

**COMMUNITY BASED TOURISM SERVICE SCORECARD**

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COMMUNITY BASED TOURISM PERFORMANCE SCORECARD

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To My Beloved  
Luqman, Iskandar and Amira

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## ABSTRAK

Pelancongan Berasaskan Komuniti (CBT) ialah apabila komuniti setempat terlibat secara aktif dalam penyampaian barangan dan khidmat pelancongan bagi kepentingan ekonomi. Komuniti untuk projek CBT mesti dipilih dengan teliti serta perlu dipantau secara berterusan untuk kelestarian. Permasalahannya, sorotan kajian menunjukkan bahawa pada ketika ini masih belum ada alatan Teknologi Maklumat dan Komunikasi (ICT) yang sesuai untuk membantu agensi pemberi dana seperti Kementerian Pelancongan membuat penilaian prestasi CBT. Tujuan penyelidikan ini ialah untuk mengisi keperluan tersebut dengan mencadangkan sebuah kad laporan prestasi untuk penilaian projek CBT. Soalan utama di sini ialah apakah penunjuk untuk kad laporan tersebut? Paradigma interpretif dan konstruktivis telah dipilih untuk menjawab persoalan-persoalan penyelidikan dengan kaedah bercampur terbenam telah dipilih sebagai pendekatan penyelidikan ini. *Balanced Scorecard* (BSC) berupaya untuk menggambarkan pelbagai perspektif sesuatu organisasi tetapi aplikasinya dalam industri pelancongan terhad dan belum pernah digunakan pada CBT Malaysia. Tujuan utama kajian ini ialah untuk menggunakan perspektif BSC untuk menguji sebuah BSC Khidmat Pelancongan yang boleh meramal pelbagai pembolehubah yang mempengaruhi prestasi sesuatu CBT, manakala tujuan kedua ialah untuk mengumpul data kualitatif prestasi CBT. Penyelidikan tindakan telah digunakan sebagai kaedah penyelidikan utama. Tiga kitaran penyelidikan tindakan telah dijalankan pada industri CBT Malaysia dengan menggunakan sebuah alatan BSC Khidmat yang diubah suai yang dibangunkan oleh kajian ini. Kitaran pertama dijalankan pada program penilaian dan pemantauan prestasi inap desa Johor. Kitaran kedua pula pada penilaian prestasi industri pelancongan Johor melalui Anugerah Pelancongan Johor. Akhirnya, kitaran ketiga dilakukan pada *telecentres* CBT di Sabah dan Sarawak. Berdasarkan penyelidikan ini dan alatan yang telah dibangunkan, perspektif yang lebih jelas dan berpetunjuk bagi CBT sudah boleh dirancang, dilaksana dan dipantau dengan lebih strategik melalui penggunaan BSC Khidmat Pelancongan.

## ABSTRACT

Community-Based Tourism (CBT) is when a local community is involved actively in the provision of tourism goods and services to visitors for economic gains. Communities for CBT projects must be chosen carefully and require constant monitoring for sustainability. Here then lies the problem; the literature review shows that currently there is no proper Information and Communication Technology (ICT) tool to assist a funding agency like the Ministry of Tourism to evaluate the performance of a CBT. The goal of this research is to fill in the gap by proposing a performance scorecard for the evaluation of a CBT project. A main research question here is what are the indicators for the scorecard? The interpretive and constructivist paradigms were chosen to answer the research questions with an embedded mixed method chosen as its research approach. Balanced Scorecard (BSC) is able to reflect the multiple perspectives of an organization but its application in the tourism industry is limited and has never been applied to Malaysian CBT. The primary purpose of the study is to use the BSC perspectives to test Tourism Service BSC that predicts various variables that can influence the performance of a CBT while the secondary purpose is to gather qualitative data on CBT performance. Action research was used as the main research methodology. Three action research cycles were conducted on the Malaysian CBT industry using a modified Service BSC tool developed in this research. The first cycle was on the Johor Homestay quality evaluation and monitoring programme. The second cycle was on the performance of the Johor tourism industry through the Johor Tourism Award. Finally, the third cycle was carried out on actual CBT telecentres in Sabah and Sarawak. Based on this research and the tools developed, a clearer and more indicative perspective of the CBT can now be strategically planned, applied and monitored through a Tourism Service BSC.

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## LIST OF ABBREVIATIONS

3BL	-	Three Bottom Line
ABC	-	Activity Based Costing
APEC	-	Asia-Pacific Economic Cooperation
ARC1	-	Action Research Cycle 1
ARC2	-	Action Research Cycle 2
ARC3	-	Action Research Cycle 3
BSC	-	Balanced Scorecard
CBST	-	Community Based Sustainability Tourism
CBT	-	Community Based Tourism
CoERI	-	Centre of Excellence for Rural Informatics
ECER	-	East Coast Economic Region
EVA	-	Economic Value Added
FELDA	-	Federal Land Development Agency
GLACIER	-	Growth, Leaderships, Acceleration, Collaboration, Innovation, Environment & Retention
ICT	-	Information, Communication and Technology
IS	-	Information System
ISITI	-	Institute of Social Informatics
JHA	-	Johor Homestay Association
JTA	-	Johor Tourism Award
JTAC	-	Johor Tourism Action Council
JTD	-	Johor Tourism Department
KKLW	-	Ministry of Rural & Regional Development
MOCAT	-	Ministry of Culture and Tourism
MOTOUR	-	Ministry of Tourism, Malaysia
NOSS	-	National Occupational Skills & Standard
PPT	-	Pro-poor Tourism

PRA	-	Participatory Rural Appraisal
SBU	-	Small Business Unit
SSU	-	Shared Service Unit
TPRG	-	Tourism Planning Research Group, UTM
TIM	-	School of Travel Industry Management
UN	-	United Nation
UNDP	-	United Nation Development Program
UNIMAS	-	Universiti Malaysia Sarawak
UNWTO	-	United Nation World Tourism Organization
US	-	United States of America
UTM	-	Universiti Teknologi Malaysia
WTO	-	World Tourism Organization



## **CHAPTER 1**

### **INTRODUCTION**

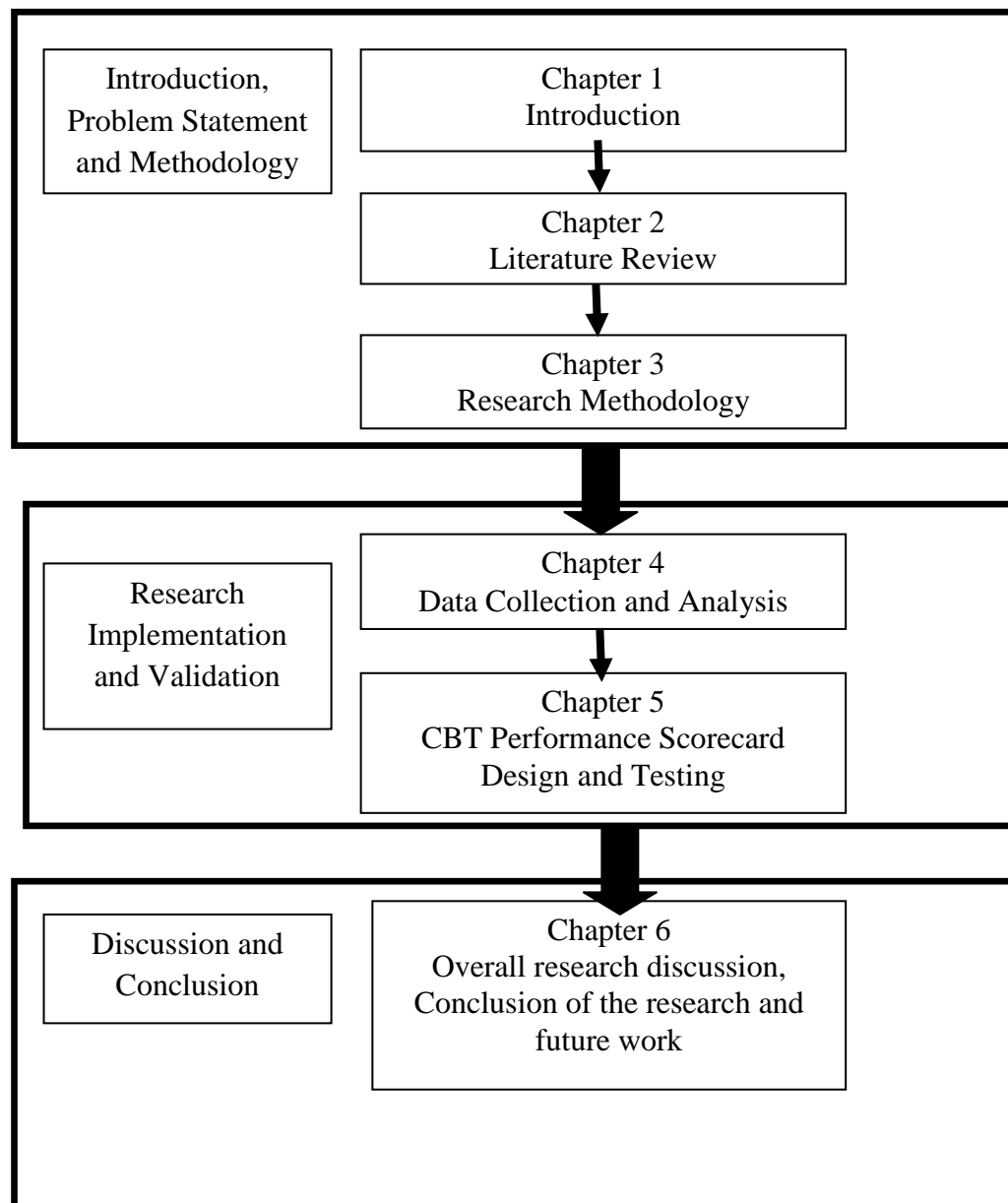
#### **1.1 Overview**

This chapter provides an overview of the study conducted. Firstly, it deliberate the research background and the set-up of the research. The key research questions asked and objectives of the research is outlined. Next is the scope of the research discussed to guide the study and then followed by the significance of the study in terms of theory, practice and methodology. This chapter is concluded with an outline of the structure adopted for the remaining sections of the study.

#### **1.2 Research Background**

According to SNV Pro Poor Sustainable Network (2007), community-based tourism (CBT) is a form of tourism in which a local community is involved actively in the provision of tourism goods and services to the visitors at a tourism destination for sustainable economic gains.

objectives and its scope. Chapter 2 is the deliberation of the related literature review while Chapter 3 is the description of the methodology and planning in conducting the research. Chapter 4 relates to the data collection and analysis while Chapter 5 describes CBT Performance Scorecard Design and testing phase. Chapter 6 presents the overall discussion on the work of the research, the conclusions and recommendation of the future work.



**Figure 1.1** Thesis organization

## **1.6 Significance of the Research**

This research is in-line with the national planning especially under the New Malaysia Blue Ocean Strategy. The proposed ICT framework has many benefits and will give an impact on the various CBT stakeholders and areas of concern in terms of socio-economic development especially to local governments that are interested to develop the community based tourism industry.

Funding and implementation agencies related to CBT like the Johor Tourism Department, the Malaysian Ministry of Tourism, the Asia–Pacific Economic Cooperation (APEC) Tourism Working Group and World Tourism Organization (WTO) as well as research institutions like the Institute of Social Informatics and Technological Innovations (ISITI), and its affiliated Centre of Excellence for Rural Informatics (CoERI), Community-Based Tourism Institute that are interested in the development of CBT will benefit from this research by having an ICT Framework and tools to effectively evaluate performance of a CBT.

A consistent evaluation to evaluate the performance of CBT was assist these organizations to plan its actions and allocate necessary resources to assist ailing as well as progressive CBT projects. The framework also was assist the CBT operators themselves to know their current situation in the form of a report card and hence take any necessary actions to improve their situation. The use of Action research in deriving the ICT framework for the toolkit was provide more information on the use and effectiveness of Action research in Malaysia.

## **1.7 Structure of the research**

The thesis is organized in seven chapters as shown in Figure 1.1. Chapter 1 is an introduction on the topic of the research, the research problem, questions, its

In order to answer this question, the following issues or sub-questions were identified:

1. What is the framework for collecting information and then evaluating the performance of a community-based tourism project?
2. What are the indicators for evaluating a community-based project at its various life cycles?
3. How to facilitate the effective gathering, storing and planning of information to produce the performance evaluation?
4. How to visualize the result of the valuation in a simple but yet balanced and holistic manner and then recommend any action to be taken?

## **1.5 Research Objectives**

Based on the main research question, the primary objective of this research is to investigate and create a suitable framework that can be used to assist a monitoring agency to evaluate the performance of community-based tourism projects.

To achieve this goal, the secondary objectives for this research are as follow:

1. To study and review the current community-based tourism performance evaluation systems.
2. To propose a framework to facilitate the effective collection of information and then to analyze the performance results for a community-based tourism project.
3. To propose a set of indicators for evaluating a community-based project at its various life cycle.
4. To identify a methodology that is able to produce the result of the performance evaluation in a simple but yet balanced and holistic manner, and recommend any action to be taken.

there is a request for funding to improve the CBT, the Ministry of Tourism does not have a proper framework to evaluate effectively CBT current performance.

Further study indicated that similar organizations suffers the same problem due to the non-existence of a proper and effective performance measurement for the CBT.

### **1.3 Problem Statement**

Literature review and initial study conducted shows that currently there is no ICT Framework available to evaluate the performance of a CBT project for a certain community.

Hence there is a need to design and create an ICT framework as a tool to evaluate the performance of an existing CBT project for a certain community so that necessary remedial actions can be taken to improve the CBT.

### **1.4 Research Questions**

In this study, an ICT Framework should assist to facilitate the performance evaluation of CBT project. The research questions is:

*What is the suitable ICT framework that can be used to assist any monitoring agency to evaluate the performance of community-based tourism projects?*

In this research, a community represent individuals from a demographic group comprised of indigenous people and rural villagers with collective responsibility and ability to make decision on their tourism business. The level of participation in the tourism activities can vary i.e. either the whole community being fully involved, partially with only certain families or selected members or in joint-partnership with commercial tourism operators and even with the involvement of government agencies.

Once a CBT project has been launched and is in operation, its implementation status like other business projects require constant monitoring and control. Here, lies the problem; according to this research, there is no proper tool to assist a funding agency like the Ministry of Tourism to assess the various stages of a CBT project life cycle. Since there was many CBT projects to be assessed, an effective tool that can provide a consistent assessment through all the phases is required as compared to the *ad hoc* manual method currently being employed.

According to the report by Project Management Institute (2001) a CBT type of project normally was go through the cycle of conceptualization or initialization phase, planning phase, implementation or execution phase and finally closing phase. Monitoring and control mechanisms are deployed in all the four phases to ensure the integrity and good management of the project. For this reason, various ICT tools have been devised to monitor and evaluate the projects.

Due to the different nature and activities in each phase, using a single tool is not feasible to evaluate the four phases of the project. Hence, there is certainly a need to have a tool to assess the feasibility of the project during the conceptualization phase, another tool to capture the preparation in the planning stage, another tool to monitor the project performance during its implementation phase and finally a tool to audit the final outcome of the project in the closing stage.

The conceptualization phase is a critical phase for CBT and its feasibility is detrimental to the community. However, many CBT projects have been launched without proper planning and as such a more proper assessment is required to determine what could be done to improve the current CBT implementation. When

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