

National Responsible Tourism Guidelines for the South African Tourism Sector

APPLICATION OF THE GUIDELINES TO THE NATURE-BASED TOURISM SECTOR

CASE STUDY ASSESSMENT

Jackalberry Lodge – Thornybush Game Reserve

Prepared by Piers Relly with Eddie Koch

March 2002

Contents

Page

<u>1</u>	<u>EXECUTIVE SUMMARY</u>	3
1.1	<u>Economic Guidelines</u>	3
1.2	<u>Social Guidelines</u>	3
1.3	<u>Environmental guidelines</u>	4
<u>2</u>	<u>ACKNOWLEDGEMENTS</u>	5
<u>3</u>	<u>INTRODUCTION</u>	6
3.1	<u>The Nature-based tourism sub-sector</u>	6
3.2	<u>Background to Jackalberry Lodge</u>	6
<u>4</u>	<u>NATIONAL RESPONSIBLE TOURISM GUIDELINES SELECTED FOR ASSESSMENT WITHIN THE NATURE-BASED TOURISM SECTOR</u>	8
4.1	<u>Economic Guidelines</u>	8
4.1.	<u>Social Guidelines</u>	8
4.2	<u>Environmental Guidelines</u>	9
<u>5</u>	<u>ASSESSMENT METHODOLOGY</u>	10
<u>6</u>	<u>RESULTS</u>	12
6.1	<u>Economic Guideline Assessments</u>	12
6.2	<u>Social Guideline Assessments</u>	23
6.3	<u>Environmental Guideline Assessments</u>	31
<u>7</u>	<u>DISCUSSION</u>	49
<u>8</u>	<u>CONCLUSIONS</u>	50
<u>9</u>	<u>RECOMMENDATIONS</u>	52
9.1	<u>Defining the nature, scope and extent of responsible tourism practice</u>	52
9.2	<u>Design and implementation of audit procedures and measurement criteria</u>	52
9.3	<u>Assistance programs to lodges – economic objectives</u>	53
9.4	<u>Community needs & interaction with lodges</u>	54
9.5	<u>Notes on repetition in the guideline questions</u>	54
9.6	<u>Notes on detailed work procedures</u>	55
<u>10</u>	<u>REFERENCES</u>	57
10.1	<u>Personal communications & interviewees</u>	57
10.2	<u>Contact details</u>	57
<u>11</u>	<u>APPENDICES</u>	58
11.1	<u>Appendix 1: Data Analysis – Jackalberry Lodge</u>	58
11.2	<u>Appendix 2: Flowchart for determining extent of lodge audit procedures</u>	Error! Bookmark not defined.

1 EXECUTIVE SUMMARY

Thornybush Game Reserve lies on the southwestern boundary of the Timbavati Private Game Reserves and to the northeast of the Limpopo province (Northern Province) town of Klaserie. The reserve consists of aggregated and contiguous privately owned game farms now incorporated under a common constitution.

A number of the privately owned farms operate established commercial tourist lodges, offering big five game viewing experiences to paying tourists – mostly from overseas. Jackalberry Lodge offers 10 beds at nightly rates (+/- R1,650 to R1,950/bed/night) - in the middle of the rates scale in its category. Its sister operation Waterbuck Lodge (8 beds) operates on a similar basis.

The Department of Environment Affairs and Tourism has developed a set of responsible tourism guidelines for establishments in different sectors of the industry. Jackalberry Lodge was selected as a pilot study in order to evaluate the performance of the lodge against a set of standards developed by the department for the nature tourism sector of South Africa's tourism industry.

This study thus reports on the performance of Jackalberry Lodge against a set of indicators developed by the department in order to measure the way in which nature tourism or ecotourism enterprises perform against the guidelines for responsible tourism.

1.1 Economic Guidelines

In the purchase of goods and services, the managers of Jackalberry lodge would like to support local and HDI business but very few of such exist in the area and those that might, do not meet quality and reliability standards. Community and lodge mentorship required.

In the employment of staff and labour practices: The enterprise shows relatively strong support in its policy of hiring mostly local employees and HDI's but it could balance the ratio of earnings share between HDI staff complement and other. The lodges show a slight gender bias towards male employees. More formally recognised training could also be applied.

1.2 Social Guidelines

In general, the managers of these private lodges understand the rationale of a program such as those advocated by the guidelines. They are willing to implement changes but struggle with best methods and capacity to execute them.

Management claim limitations such as:

- Budgetary and financial (often determined by the owners and not the managers)
- Resource constraints – lack of time to pursue community development and transformation activities
- Lack skill and capacity to engage and persevere with projects
- In the case of Jackalberry, they manage the lodge(s) and the land, adding an additional tier of responsibility and time commitment

In the case of privately owned game reserves there are fewer motivations to drive community process. This was attributed to the following:

- Lack of congruence in the policy of separate land owners with different agendas
- Unwillingness of landowners to go beyond certain budgets (financial or resource)
- No joint land ownership or lease arrangements between community and landowners
- Lack of state NGO support/intervention and/or donor funding.

Nonetheless, the greater reserve has implemented a compulsory contribution from each landowner to the local school. In addition to this, various contributions have been made by Jackalberry to local or regional causes, but other than school funding, managers and lodge owners have not been able to initiate and support community training, development, skills acquisition & enterprise development.

1.3 Environmental guidelines

Water energy and waste disposal guidelines are fairly clearly defined and require changes in attitude plus in some instances straightforward financial cost-benefit decisions. The lodge is not under any financial pressure to implement energy saving investments. It is perceived that electricity is the most convenient energy source and at present, they will manage the unnecessary use of power. Usage is not monitored in detail.

Likewise with water, borehole and river water is unlimited and obtained at a low cost. Whilst this does not imply a lack of interest in good water management on the part of the managers and staff, there is little perception of its cost and hence less incentive to accurately monitor usage. This area of environmental management does not receive much attention.

Solid waste is responsibly separated and disposed of but the destination of bottles and cans removed from the property is unknown. The disposal of waste water requires more careful attention.

Responsibility for the land falls on the management company which engages in: habitat and carrying capacity surveys, infrastructure maintenance, erosion protection, game management buffalo breeding and land rehabilitation. It is difficult to assess the extent of the above but it is in the interests of landowners to perform these tasks effectively in order to manage sustainably the trade-off between a consistent wildlife tourism experience and a balanced habitat.

2 ACKNOWLEDGEMENTS

Kevin Godding and Sue Godding of Jackalberry Lodge for kind assistance with interviews and sourcing of data for analysis.

Anna Spenceley for the use of her thesis material: Spenceley A, (2002), *Sustainable Nature-Based Tourism Assessment, Jackalberry Lodge, Thornybush Greater Game Reserve*, Phd working paper

3 INTRODUCTION

3.1 The Nature-based tourism sub-sector

The nature-based tourism industry is one that relies heavily on the integrity of an attractive environment to persist. By its very definition, it frequently occurs in rural rather than suburban areas, where the majority of South Africa's poor people reside. The responsible design and management of enterprises working in this sector of the tourism industry has critical implications for the growth and maintenance of economically, socially and environmentally sustainable development.

This document sets out the assessment of the draft guidelines and indicators for responsible tourism as applied to one nature-based tourism enterprise: Jackalberry Lodge. It is important to note that the guidelines selected to address the nature-based tourism sub-sector are only a small proportion of the agreed national responsible tourism guidelines. They have been highlighted in terms of importance for assessment for the following reasons:

- They can be assessed during the operational rather than construction phases – with data that should be readily available to enterprises
- Attractiveness to consumers (tourists and tour operators) – these are issues that the tourism market and the tour operators *want* to know about

Objectively and transparently measurable and declarable – rather than qualitative or intangible issues that are open to interpretation by assessors.

Dealing with the selected guidelines will decrease costs for business, and improve marketability of operation. It does not, however, mean that the others are unimportant!

The assessment methodology has been designed to address the following questions:

- What baseline information is available to address the guidelines?
- What objectives do the case studies have that relate to the guidelines?
- What systems are there in place (or can be designed) to monitor progress towards the guidelines?

3.2 Background to Jackalberry Lodge

Thornybush Game Reserve lies on the southwestern boundary of the Timbavati Private Game Reserves and to the northeast of the Limpopo province (Northern Province) town of Klaserie.

The reserve consists of aggregated and contiguous privately owned game farms now incorporated under a common constitution. The reserve is divided into northern and southern management areas.

A number of the privately owned farms operate established commercial tourist lodges, offering big five game viewing experiences to paying tourists – mostly from overseas. Jackalberry Lodge offers 10 beds at nightly rates (+/- R1,650 to R1,950/bed/night) - in the

middle of the rates scale in its category. Its sister operation Waterbuck Lodge (8 beds) operates on a similar basis.

The reserve borders the Timbavati community. There are no joint land ownership arrangements or leases between the privately owned farms and the community, so external participation in the activities on the reserve arises primarily through formal and casual employment. The majority of employees reside beyond the boundaries of the Timbavati village community.

Prior to their employment at Jackalberry lodge and/or the Timbavati region, management all resided in areas outside of the 50km measurement range.

4 NATIONAL RESPONSIBLE TOURISM GUIDELINES SELECTED FOR ASSESSMENT WITHIN THE NATURE-BASED TOURISM SECTOR

4.1 Economic Guidelines

<p>1. Buy locally-made goods and use locally-provided services from locally-owned businesses wherever quality, quantity, and consistency permits. Monitor the proportion of goods and services the enterprise sourced from businesses with 50 km and set 20% target for improvement over three years.</p>
<p>2. Give customers the opportunity to purchase locally produced crafts and curios, set targets to increase the proportion of sales of goods sourced within 20 km of the enterprise. Assist local craft workers to develop new products to meet market demand as evidenced in the enterprise.</p>
<p>3. Government and established businesses need to redress previous imbalances, and to enable the historically disadvantaged to engage in the tourism sector. For example they should source 15% of services and 15% of products, increasing by 5% per year, for 3 years, from historically disadvantaged groups, and/or individuals, and report on purchasing activities.</p>
<p>4. Encourage visitors to spend more money in the local economy, and to visit local bars and restaurants and participate in tours to local areas, bringing business to local communities. Where appropriate treat this as part of the business of the enterprise and charge a booking fee or commission, or sell craft and local food products through the mainstream enterprise.</p>
<p>5. Recruit and employ staff in an equitable and transparent manner and maximise the proportion of staff employed from the local community. Set targets for increasing the proportion of staff and/or of the enterprise wage bill going to communities within 20 km of the enterprise.</p>
<p>6. Be transparent when reporting community benefits distinguish between</p> <ul style="list-style-type: none">• Benefits to employees• Benefits to emerging or community based entrepreneurs• Community benefits, for example leasehold payments that go to community projects (grinding mills or school books) or are distributed as household income in the local area. <p>Consider establishing targets to monitor progress in achieving objectives.</p>

4.1. Social Guidelines

<p>7. Consider what contributions the enterprise can make to scholarships, local youth sports teams and other community causes. Monitor and report increasing contributions with respect to the number of projects and level of investment</p>
<p>8. Use tourism as a catalyst for human development, focussing on gender equality, career development and the implementation of national labour standards. (Report on gender</p>

equality and career development)

9. Use local guides, and encourage them to continually improve their quality, to ensure that the community speaks for itself and to increase the revenues going into the local community (by higher fees for quality tours). Monitor and report this economic contribution to the community and set targets to increase it annually.

10. Develop a local social contract for interactions and behaviour between the local community and tourists (including responsible bargaining), developed with the participation and contributions from the community, and display it prominently for visitors and publicly within the community.

4.2 Environmental Guidelines

11. Meter the quantity of water consumed and manage consumption and leakage so as to reduce water consumption by 5% per annum for 3 years, and report water consumption and performance in monitoring.

12. Measure electricity consumption and introduce energy saving measures to achieve 5% reduction in use per annum over three years. This can be done by for example dimming lights, using low energy appliances and light bulbs and enhancing the use of natural ventilation

13. Set targets to increase the proportion of energy used from renewable resources – for example solar, wind, hydroelectric (increase by 10% over 3 years). Sustainable use of wood, from indigenous and plantation forests is complex, and great care needs to be taken.

14. Set percentage targets and time scales for the reduction of waste produced, levels of recycling and reuse of waste from the enterprise. Set appropriate targets for reduction and/or recycling of waste produced per year for paper (5%), plastics (5%), metal (5%) and glass (5%). Report on progress towards 15% targets over 3 years.

15. Invest a percentage of profits or turnover in species conservation or habitat restoration and management. Report the investment, and try to increase this by 5% per year.

16. Work with conservation authorities to ensure that visitors to natural heritage areas are aware of the impacts that they may have on the ecology of the area and how they should behave in order to minimise those impacts.

5 ASSESSMENT METHODOLOGY

The study was conducted by Piers Relly with Eddie Koch during the week 11th to 15th February 2002, using research information produced during a detailed study conducted by Anna Spenceley in 2001 as a basic set of data from which to update information required for the audit. The quantitative financial information was drawn from the accounting records for the financial year ended December 2001. Other information was obtained by discussions with the lodge director, Kevin Godding and the general manager Sue Godding. A summary of the finding was submitted to lodge management in order to verify accuracy. The report thus augments written information obtained from the Spenceley report referred to above and includes further information obtained during the study period, congruent with the Terms of Reference.

A recommendation for future reporting would be that researchers base their data on the entity's financial year rather than a strict calendar year. In many instances, especially with small lodges, the information system is geared to financial year ends and the process of accruing and deferring to adjust to a calendar year is an inconvenience for both researchers and lodge personnel.

Amongst issues addressed in the process, is the need to collect data conveniently and without disturbance to the staff at the lodges. If the data collection cannot be done within a day to two days, either the clients records are not accessible (usually the case) or the research/audit methods must be redesigned to focus on certain key statistics ie the data criteria must be shortened to make rapid measurability possible.

The lodge does not present disaggregated accounts (although it does allocate certain costs to each of these entities in a consolidated income statement) and the core data covers the activities of Jackalberry and Waterbuck lodges, Kayatula (owner use) as well as the Southern Thornybush Wildlife and Property Management co.

The data collected, mainly of a quantitative financial nature, was recorded on Excel spreadsheets provided by Anna Spenceley. The data provided is formatted to provide statistics relevant to various chapters of this study

The data records (or attempts to record in the instance of insufficient supporting information), findings in each of the triple bottom line criteria headings of Economic, Social and Environmental outputs. See Appendix 1.

Management are currently in the process of creating a separate entity, known as the Southern Thornybush Wildlife and Property Management Company (TWPMC). They are aiming to present separated financial information for lodge and land management activities. This is particularly important in the case of TWPMC as it is engaged in the land management for all of the privately owned properties in the southern Thornybush area, including those which are not allied to the lodges and those which are not engaged in commercial tourism enterprise. It serves a wider constituency than Jackalberry and associated lodges. It should strictly be evaluated as a land manager being a different sub-sector of tourism enterprise. Nonetheless, in this study land management is identified in some instances with the lodge operation (Economic and Social) and in the other

(Environmental) as a stand-alone operation. In the next reporting period it will be possible to identify this unit separately and researchers should make a clear distinction between the two (in this and other potential case studies).

It may be necessary to consider the land management under a separate study as it is not strictly a part of the game lodge sub-sector.

6 RESULTS

6.1 Economic Guideline Assessments

6.1.1 Enterprise purchasing

1. Buy locally-made goods and use locally-provided services from locally-owned businesses wherever quality, quantity, and consistency permits. Monitor the proportion of goods and services the enterprise sourced from businesses with 50 km and set 20% target for improvement over three years.
2. Give customers the opportunity to purchase locally produced crafts and curios, set targets to increase the proportion of sales of goods sourced within 20 km of the enterprise. Assist local craft workers to develop new products to meet market demand as evidenced in the enterprise.
3. Government and established businesses need to redress previous imbalances, and to enable the historically disadvantaged to engage in the tourism sector. For example they should source 15% of services and 15% of products, increasing by 5% per year, for 3 years, from historically disadvantaged groups, and/or individuals, and report on purchasing activities.

6.1.1.1 Assessment

Goods and services purchased during the year under review. Refer Appendix 1.1

Highlights

Item	%
Total spend on all purchases over the year	R 607,237
Proportion of total spend on all items <i>made</i> within 50 km of the enterprise	0.2% (A)
Proportion of total spend on all items <i>made by</i> historically disadvantaged groups and/or individuals: The table indicates a result of	0%(B)
Proportion of total spend on all items <i>purchased</i> within 50 km of the enterprise	59.6% (C)
Proportion of total spend on all items <i>purchased from</i> historically disadvantaged groups and/or individuals	0.2% from one supplier (D)

6.1.1.2 Crafts and Curios Highlights:

Total cost of craft and curio purchases over the year	R110,818
Proportion of total spend on crafts and curios <i>made</i> within 20 km of the enterprise	0% (E)
Proportion of total spend on crafts and curios <i>made by</i> historically	0% (F)

disadvantaged groups and/or individuals	
Proportion of total spend on crafts and curios <i>purchased</i> within 20 km of the enterprise	0% (G)
Proportion of total spend on crafts and curios <i>purchased from</i> historically disadvantaged groups and/or individuals	1% one supplier (H)

Services used by the enterprise. Refer Appendix 1.1

Total spend on services over the year	R 1,329,084
Proportion of total spend on services sourced within 50 km of the enterprise	38.3% (I)
Proportion of total spend on services sourced from historically disadvantaged groups and/or individuals	0% (J)

6.1.1.3 Outputs

What are the stated objectives of the enterprise in terms of local and HDI purchasing?

- Management states the desire to support local industry if it is able to supply goods and services of the quality required. It does not have any written objectives in this regard.

Report on items marked A-J

- With regard to the figure of 0% in B: The review time did not permit direct contact with producers of the goods. This is a time consuming yet probably meaningless item of data to attempt to quantify. For example: was mayonnaise purchased at the local store made by HDI's? It probably was made by black workers at a factory in one of the industrial areas of the country but whether the owners of the business included HDIs would entail lengthy research (and what proportion of the sales value of that item actually accrued in wages to HDI's). The forthcoming workshop should consider the practicality of this item of data collection and consider applying it only to certain goods e.g. crafts.
- It may also be an idea to consider whether responsible tourism ethics prioritise HDI business ownership, local purchase of goods and services or support for small business i.e. spread of purchases to more individuals.
- With regard to items G&H: There is a strong likelihood that the majority (say 90%) of these goods purchased were originally made by HDI's somewhere in Africa but the all these products may pass through the hands of several middlemen making the identity of the original maker difficult to trace and the actual value of his/her margin and/or wages earned in the manufacture plus the identities of and margins payable to any middlemen. Alternatively, the researcher must peruse the stock, identify each stock item by its style of manufacture & hence the origin and the maker. The question thus arises whether a Kenyan curio trader selling goods made in Kenya is selling HDI made goods? Did he wholesale to a non-HDI owned business in South Africa etc. etc. The

permutations are seemingly endless and will generate huge measurement problems in larger lodges with high levels of transactions.

- In the case of Jackalberry lodge, the lodge managers have indicated a strong willingness to conform to the principles of buying locally from HDI owned businesses. Limitations in this instance are reliability, quality, and capacity to deliver these supplies/services. According to the managers of Jackalberry, such businesses do not exist in the area. There also appears to be minimal local craft industry. The lodge thus cannot easily fulfil the requirement of purchasing from local HDI owned businesses nor from local makers of craft and curios.
- Experience in other parts of South Africa and southern Africa indicate that a strong and methodical local economic development initiative that sets up and sustains a small business development programme is required for the regional economy in which the lodge exists in order for these objectives to be meaningfully met – and then even where such LED programmes exist, experience indicates that it is extremely difficult for small businesses to compete effectively with imported goods and services. See the discussion in section 9 below for more detailed discussion on this point.

Report on realistic annual targets to increase the proportion of total spend on *goods made* within 50 km of the enterprise if the proportion was to increase by at least 20% over 3 years.

Do the same for all goods *purchased* within 50 km; for crafts and curios *made* within 20 km; and for crafts and curios *purchased* within 20 km; *services sourced* within 50 km.

- Stated in this narrow way, these targets do not appear to be practical for management. There are no local businesses that meet the requirement as defined in this criterion. However it is likely that in the broad Lowveld area in which the Jackalberry Lodge operates, there are a large number of small businesses, crafters and cultural tourism projects that could be supported by the lodge. This would require a support programme to help identify these opportunities and to make them known to lodge management. Management are willing to buy more locally given the backup of such a support programme.

Produce an action plan and strategy to show how the enterprise will change its purchasing to meet each of these targets (The enterprise will then be able to produce annual progress reports.) Include initial targets in the plan for 15% total spend on goods and 15% total spend on services sourced from HDIs, and actions to increase this by 15% over 3 years. (< 1 page of summarised points)

- No targets have been set. As mentioned above, the company would like to purchase more goods and services from HDI's but as mentioned elsewhere in this report, quite aside from the non-existence of these businesses in the nearby areas, issues of quality, reliability, consistency and price are all relevant (and demand in the case of curios).

Action Plan

- Identify, by category the types of transactions divided: services & goods (using the results of this study)
- Within each category, establish (current) distance of procurement from the lodge
- Determine the degree of quality required (i.e. capacity of region to supply from any source)
- Identify ease of substitution of business source (to HDI owned business)
 - By raising this policy intention at community meetings
 - Placing a list of procurement *policies* with tribal indunas, chiefs and council members
 - Place list of goods and services which could be provided by HDI business and the value (approximate) of these G & S's annually.
 - Invite proposals for the procurement of this business on a tender basis and at arms length, i.e. avoiding nepotistic practices.
 - Invite suggestions for goods & services provided from outside the region which could with some engineering be supplied within the region and moreover by HDI's.
- Proceed as if normal tender process by examining any incoming proposals from the above sources and assess capacity to supply.
 - Contact the following sources as leads for this process:
 - Ebony Consulting International (Johannesburg): Tourism Enhancement Program, Tim Anderson
 - DAI International (Johannesburg). Ghaza Kruger Gonarezhou TFCA co-ordinators for linkages to SMEDP promotion possibilities. Todd Johnston (USAID funded program) – Nelspruit office or cell 083- 2737639
 - Eddie Koch or Piers Relly

Report on any activities that have attempted to help local craft workers develop new products suitable for guests at your enterprise (e.g. how local businesses are informed of demand; number of craft workers contacted)

- None

Describe what improvements have been made with the assistance of the enterprise (e.g. promoting local goods to tourists; improvements in terms of quality, range, suitability for the market, sales etc)

- None

Describe how the purchasing activities of the enterprise contribute to poverty alleviation and support of historically disadvantaged individuals.

- This question is asked in several different sections. The answer is consistent amongst all of them.

Has the enterprise identified any constraints in this process, for particular communities or individuals?

- Yes. Lack of capacity, mentorship, individual incentive and entrepreneurial activity within local communities. The lodge does not have the human resources to manage the community mentorship process

6.1.2 Tourist purchasing

Encourage visitors to spend more money in the local economy, and to visit local bars and restaurants and participate in tours to local areas, bringing business to local communities. Where appropriate treat this as part of the business of the enterprise and charge a booking fee or commission, or sell craft and local food products through the mainstream enterprise.

6.1.2.1 Assessment

How far is the enterprise trying to promote a fuller understanding of the importance of local purchasing to its tourists?

- Minimal education because there are not a significant number of nearby businesses from which to purchase. If provided with information about activities, businesses, craft markets and cultural tourism activities in the broader region the lodge would be willing to advertise these to its clientele.

List the closest local bars, shops, restaurants, and attractions to the enterprise, and the distance from the enterprise (eg. <20 km)

- The closest shop to the lodge is the Guernsey Store which sells petrol, diesel and basic supplies. A number of tea gardens and stopover restaurants/B&B's (non HDI owned) may be visited in the Klaserie area. Further afield are Moholoholo (Wildlife Rehabilitation Centre), Blyde River Canyon and the Kruger National Park. All fall outside of the domain of the Jackalberry Lodge tourism enterprise. There are a number of community projects and cultural tourism activities that support village resident near the upper Blyde River Canyon area.
- From time-to-time (infrequently), tourists request visits to certain of these attractions. The management of Jackalberry subcontracts these day trips to outside operators as they do not have the capacity to undertake these tours. Many tourists who arrive by car are touring the country overland as Free Independent Travellers (FIT's). They usually visit locations outside of Thornybush at their own discretion and as part of independent holiday plans – and lodge management is willing to advertise projects and destinations that promote local economic development if provided with the relevant information.

6.1.2.2 Output

Report on the ways in which the enterprise has encouraged visitors to spend more locally (e.g. flyers/brochures advertising local bars/markets, organised and informal tours and trips to local markets/restaurants, booking fees employed, word-of-mouth, awareness of the quality of service and produce available locally).

Attempt to quantify local spend by tourists (e.g. number of your visitors going to local markets/shops, information from guests or from suppliers). Quantify this in a way that is easiest for you to do.

- A very broad set of estimates are: R56 /tourist/guest night (in the lodge curio shop) - based on annual sales/bed nights sold & R59 on drinks/bed night. It is likely that a similar amount is spent outside of the lodge per day, if guests were to consume locally produced goods. Add R 50 for a meal. Overseas tourists probably spend in the region of R155/pp./day. The figure for local tourists is around R50/person.

Set targets to increase level of tourist spend on local food, drink and products (e.g. 5% per year, for 3 years), and report these.

- No targets set. See above

Produce an action plan and strategy to show how the enterprise will reach its targets. (< 1 page of points)

Action Plan

- Management have agreed that if local community can produce crafts, they would undertake to allocate a special shelf in the curio shop – notifying guests of the importance of buying local goods & the reasons therefore.
- Undertake a similar process to the supply of goods and services by soliciting proposals from community representatives - and if not forthcoming, by providing a short list curio requirements at the lodge
- If possible, demonstrate by taking samples of curios on sale in the lodge
- Mentors could include the nearest craft centre to provide advice to prospective craft suppliers or even as an additional outlet for craft manufacturers.
- Contact Kim Sacks gallery in Johannesburg. She is linked to a number of community programs and procures art and craft from a wide area in Africa. Alternatively, contact the same organisations listed on p. 14 for leads.
- Within the lodge environment, inclusive in the document package given to guests, supply a short printed rationale for these actions (based on these guidelines), emphasising the importance of supporting local business and how this will serve to link the tourist's activities within the reserve to the community businesses and the role that they can and should play in responsible tourism.
- At current levels, it would require local purchases of curios to rise to base level of R 5,000/annum, increasing by R 5,000 per annum over the following two years.
- The above intentions should be documented and supplied to the local contact individuals as identified. Preferably also by establishing bulletin board at a pre-arranged place. The local community members will be able to consult this venue for details of any proposed contracts.

Describe how tourists purchasing activities contribute to poverty alleviation and support of historically disadvantaged individuals.

- Average household income is low, less than R400 per month. One purchase of curios or other goods for the value of say R100 could boost one household's income by more than 25% in such an instance. This would have significant effects on household nutrition and with each increment in revenue from (craft) sales, access to good education (also underprovided in the area) may become more affordable.

Where there is no supply from local communities, what steps will the enterprise take to set up workshops or facilitate the process?

- Lodge managers have discussed possibilities with local chief & indunas. Ideas mooted were: model village, lifestyle tours, sangoma visits, curio & craft stalls. Management have suggested this on a number of occasions but effort is more passive ie the seeds of ideas have been sown with community representatives and the lodge would welcome any viable proposals. Experience in other parts of the country point to the need for a structured local economic development initiative for the region in which lodges exist by an agency (government or non government) that exists outside of the enterprise.

6.1.3 Employment

Recruit and employ staff in an equitable and transparent manner and maximise the proportion of staff employed from the local community. Set targets for increasing the proportion of staff and/or of the enterprise wage bill going to communities within 20 km of the enterprise.

6.1.3.1 Assessment

In relation to all of your staff complement over the past year, list the following;

- All information regarding employment was obtained except the names of employees' home villages and the exact distances of their residences from the lodge. Of the total employees, 27 were classified as local, comprising 66% of total staff. This figure was calculated by extrapolating information taken from Anna Spenceley's report and adding new local employees for 2001.

Then work out the following from the information you have collected:

Total number of permanent staff	41 (K)
Total number of temporary staff (employed over the past year)	max 16 currently 6 (L)
Proportion of staff recruited/resident within 20 km of the enterprise	27 staff 66% (M)
Proportion of the total wage bill (permanent & temporary) paid to people from within 20 km of the enterprise:	Insufficient data to calculate this as a percentage. As an alternative HDI percentages are calculated and indicate that HDI's made up 68.3% of staff complement

	& earned 41.7% of average annual remuneration (N)
Proportion of staff who have received training through the company	this year 15% (O)
Proportion of staff who had advanced through promotion in the company	this year 17% (P)

6.1.3.2 Outputs

Report on assessment items marked K-P

- A high proportion of staff (27/41, 66%) resided within 20 km although only a few lived close to the reserve boundaries. This is a reasonable statistic bearing in mind the need for wildlife and tourism to be seen to be supporting local economy.
- If the same statistic holds true for the rest of Thornybush, then one can expect around 200 employees to be supported by local tourism economy. At an average package/month of R 1,500, this could translate to annual earnings in the local economy of R3.6 million (a highly speculative point).
- Excluding farm employees and the corporate lodge Kayatula, the staff bed ratio is 28:18 (includes Waterbuck lodge), 1.55 staff per bed. This is a fair ratio. (Low is 1.2 and high is up to 3 in top end lodges)
- HDI staff made up 68% of the total staff complement and earned 41.7% of the total monthly cost to company for the month reviewed.
- Refer extract below:

Average Ann. Sal.	HDI	R12,881
Salary	Other	R38,864
Without GM & Asst		R28,188

- Average salary of other = 2.2 times higher than HDI average
- Note: the above calculation excludes 2.5% turnover shared between all non-management staff
- The above figures also exclude annual bonuses, gratuities (difficult to estimate), and all non-financial benefits to employees.
- Above taken from payroll for ratio purposes only.
- The 2.5% turnover share to staff is generous and almost unique in the writers' experience of lodge reviews which covers some 60 – 70 lodges.
- Recruitment & promotion shows a high percentage of males. This is mainly attributable to new employees taken on by STW&PM Co (the land management co.) and the reshuffling of employees throughout the three lodges and farm. No gender preference

given, most of the positions were vocations usually associated with male employment: mechanics, farm assistants, assistant farm manager etc.

Report on targets and strategies to increase the proportion of staff from communities within 20 km of the enterprise. (e.g. aim for at least 20% of the workforce, with preferential recruitment for poor, rural communities when vacancies are available)

- Job turnover is low due to scarcity of employment. Opportunity to recruit is therefore limited, whether locally or further afield. The higher skilled employees tend to be more mobile. Rangers and non- shareholding managers average approx 18 months in this industry but are not easily replaced by local community as skills absent. This could change with a structured training and skills development programme of the type being implemented by the Tourism and Hospitality Education and Training Authority (Theta).

Report on strategies to increase the proportion of the total *wage bill* going to staff from communities within 20 km of the enterprise by 2% above inflation each year. (e.g. preferential recruitment from poor, rural communities when vacancies are available; training and promotion for local people)

- No strategy but note that 2.5% turnover share and 13th cheque is paid to non-management on a quarterly basis. Although average annual wage is low, the lodge is making attempts to share in the success of the lodge and incentivise by paying turnover share based obviously on occupancy and turnover.

Report on company safeguards to ensure that recruitment and promotion occurs in an equitable/transparent manner (e.g. without nepotism, or discrimination based on race, sex or disability)

- Staff turnover is low but most recruitment is by word of mouth and this tends to reinforce the value of knowing a staff member at the lodge. The General Manager, assures that there is no gender discrimination and no reports thereof have been noted.

Describe how the enterprises employment and wages contributes to poverty alleviation and support of historically disadvantaged individuals.

- Average household income is low, less than R400 per month. An income of in excess of R 1,000 per month enables the recipient family to significantly improve standards of living, particularly nutrition.

6.1.4 Community benefits

Be transparent when reporting community benefits distinguish between

- Benefits to employees
- Benefits to emerging or community based entrepreneurs
- Community benefits, for example leasehold payments that go to community projects (grinding mills or school books) or are distributed as household income in the local area.

Consider establishing targets to monitor progress in achieving objectives.

6.1.4.1 Assessment

(Benefits to employees, and to emerging or community based entrepreneurs have been covered already.)

Current resource use benefits from Jackalberry Lodge for the staff are:

'Women may cut reeds to make mats from the reserve: they are told where they may collect them from and when

- *People are allowed to fish in the dams to eat, and must ask permission to do so, and not take young fish*
- *Harvesting termites*
- *Harvesting marula fruit*
- *Meat rations of 2 kg are allocated weekly to all staff*
- *There are also incentives to report poaching and thefts through bonuses.'*

Source: (Spenceley pg. 13)

What is the vision for how the local community should look in 5 years?

- Refer to 6.1.4.2 (Outputs) below

List the community projects that benefit from the enterprise. Refer below & Appendix 1.3.

Project	Ann. Contribution	Source donations	
		Tourist Donations	Enterprise revenue
Computer Centre	R 3,706.00		R 3,706.00
Ilkley School contribution	R 9,486.00		R 9,486.00
Theatre Group (5 trips)*	R 1,500.00		R1, 500.00
Theatre group gratuities	R 1,000.00	R 1,000.00	
Wildlife College (Show)	R 2,000.00		R 2,000.00
Entertainment, chief, indunas	R 3,000.00		R 3,000.00
Community Tourism Rally	R 1,500.00		R 1,500.00
Total	R 22,192.00	R1,000.00	R 21,192.00

Specify those that occur within 50 km of the enterprise:

- Only the Wildlife College (R 2,000) is beyond 50km limit (R)

Quantify the amount of money (or in kind – materials, labour, equipment) provided to each enterprise per year.

- Refer to above table(S)

Specify where this money comes from (e.g. revenue, donations from tourists, grants).

- Refer to above table (T)

Establish targets for increasing the support provided to each community project assisted.

- This is done on an annual budgetary basis (U)

6.1.4.2 Outputs

- Total contributions of R18,692 were paid to the local community amounting to 0.8% of enterprise revenue. A further 2.5% of revenue is paid to staff as an incentive (refer wages above).
- The computer centre is not currently in use and the project fell apart. This is attributed to lack of community awareness and buy in. Management brokered the arrangement for the community via certain members but later learned that certain community members were not aware of the arrangement. It is not certain whether the community actually has the technical skills to sustain the operation as Jackalberry does not have the capacity to do so itself.
- The Ilkley environmental school takes in scholars from nearby schools (on a subsidised basis) and gives them exposure to nature and the importance of tourism to SA. It is proposed that a grant be given by all land owners every year as the school plays a major role in increasing the awareness and importance of conservation and tourism.
- The lodge also supports shows put on by the Wildlife College and the theatre group. This contributes to tourist awareness of local culture. The lodge intends to continue with this support.
- The managers at Jackalberry lodge speak at community forums from time to time (mainly with chiefs and indunas), and the Wildlife College.
- The lodge management would like to support more community projects and a medium term vision is for the inclusion of more local business in both cultural and economic activity (purchasing of crafts and goods for consumption)
- The lodge would also like to see increased contribution from other landowners enabling a broader educational support base for local residents

6.2 Social Guideline Assessments

6.2.1 Community projects

Consider what contributions the enterprise can make to scholarships, local youth sports teams and other community causes. Monitor and report increasing contributions with respect to the number of projects and level of investment

6.2.1.1 Assessment

List the type of community projects within 50 km that the enterprise would be interested in supporting or helping to initiate (e.g. bursaries, youth sports teams, clinics, schools, water projects, business enterprise schemes):

- Bursaries will be made to Southern Cross school in Hoedspruit once it is established and adequately funded (A)

Consider how support could be provided (e.g. proportion of revenue, channelling donations from tourists, training, materials): The lodge is attempting to solicit contributions from all land-owners (some do not wish to contribute) via the management company.

- Projects will be voted from that budget (B)

Report on increasing contributions, and aim to monitor improvements regularly (Number of projects; level of investment; equity; where investment came from)

- Note the comments above - the degree of support will be dependent on the level of buy in from other land owners who may be constrained by the fact that they are not running commercial operations which are able to fund any proposed project (C)

Describe the use of participative and full consultation with the community in setting objectives for activities to support (e.g. the community projects funded must be those that are needed by the community) (D).

- The computer centre has provided a worthwhile lesson in this endeavour. Lodge management will in future be more mindful of the need to obtain broader consensus on the issue of needs priorities. The lesson has been a valuable one in that the Jackalberry managers are more aware of the protocol involved in sponsorship of assistance through the agency of the tribal structure. (D)

Record non-monetary support (e.g. in terms of materials, training) Support takes place in the form of advice on the possibility of establishing small local business (E).

- This involves meetings and entertaining community members. The farm assisted recently in the ploughing of local fields for the community. (E)

Report on progress and activities of projects, including in cases where funding or support has ceased (F).

- Aim to monitor progress regularly. Refer outputs in section 6.1.4 above.

6.2.1.2 Outputs

Report on A-B in cases where community projects have not yet been supported.

- The lodge managers and several other parents in the area are launching a private school in the nearby town of Hoedspruit. The future parents are in the process of fund raising to construct the school. Many of them are making a large contribution to this investment. It is proposed in due course that some scholarships will be granted to deserving children in the area who's parents will not be able to afford the school fees.
- The lodge management would like to take their lead from the community leaders as their experience with the provision of computers has been a worthwhile lesson in the need to both discuss support with representative community and then provide ongoing support or alternatively to arrange that individuals with capacity are able to do so

Showcase C-F where community projects have been supported over the past year.

- The lodge is also constructively engaged in persuading other landowners to make a fixed budgetary allocation to other community projects which include continued support for Ilkley school to sponsor local schoolchildren to a nature experience. The school has a good reputation and draws its visiting children from several provinces. Each paying visitor enables the school to host a child from the local schools in the area (Several dozen schools participate) at a heavily subsidised rate (R 10 per day is charged).
- These children are selected from a particular grade and sent off for the duration of the camps, lasting several days.
- Other support is provided to shows held by local community dance/singing troupes and the Wildlife College. Although the support is minor in financial terms, it generates substantial goodwill.
- Assistance to local community and entertainment to their leaders is also provided as a goodwill gesture to maintain good relations with community residing outside of the reserve.

Report on the selection criteria for community projects that are/will be supported.

- Formerly, management would make contributions at their own discretion. Any future plans will be prioritised according to the needs expressed by local (and representative) community.
- Management will continue with the smaller contributions based on the goodwill generated, the need for continuity and that they are targeted at provision of some remuneration to local residents.

6.2.2 Human Development

Use tourism as a catalyst for human development, focussing on gender equality, career development and the implementation of national labour standards. (Report on gender equality and career development)

6.2.2.1 Assessment

Use the information already collected under Guideline 5: Employment

6.2.2.2 Outputs

- Of the permanent staff, gender split: male (71%), female (29%).
- Excluding farm employees, gender split is 57%M:43%F
- Six staff received training (14% of total), all male.
- Six staff were promoted, five male (83% of promotions) and one female.
- Staff turnover is low due to job scarcity.
- Most of the promotions have resulted from the restructuring of the lodge and farm activities and to some extent organic growth. (New private lodge extensions)

Report the proportion of men to women employed at the enterprise

- Refer table below

Report on the proportion of men and women employed in each type of job in the enterprise (e.g. 80% cleaners female; 50% managers male).

- Refer table below.

Report on the proportion of men and women who have received training during the past year, and the type of training (e.g. National Qualifications; Learnerships)

- Of the six trained, five were in house and the sixth was a FGASA qualification to the lodge manager of Jackalberry

Report on the proportion of men and women who have been promoted within the enterprise.

- Refer table below.

Report on the proportion of men and women who have been recruited during the past year.

- Refer table below.

State how national labour standards are applied.

- Refer table below.
- Refer appendix 1.2

Table: Job description and gender breakdown

	Total No.	Men	Women	% M	% F
Manager	6	5	1	83%	17%
Assistant Manager	1		1	0%	100%
Mechanics	2	2		100%	0%
Ranger/Tracker	2	2		100%	0%
Chef	2		2	0%	100%
Housekeeper, Laundry, Waitress	7		7	0%	100%
Handyman	1	1		100%	0%
Groundsmen	2	2		100%	0%
Security	2	2		100%	0%
Pensioner	1	1		100%	0%
Farm supervisor	3	3		100%	0%
Farm assistants	10	10		100%	0%
Book keeper	1		1	0%	100%
Farm driver	1	1		100%	0%
Total	41	29	12	71%	29%

All staff: Training, Promotion, Recruitment

Activity	Total	Men	Proportion of total	Women	Proportion
Trained	6	6	100.0%	0	0.0%
Promoted	7	6	85.7%	1	14.3%
Recruited	8	8	100%	0	0%

6.2.3 Local Guides

Use local guides, and encourage them to continually improve their quality, to ensure that the community speaks for itself and to increase the revenues going into the local community (by higher fees for quality tours). Monitor and report this economic contribution to the community and set targets to increase it annually.

6.2.3.1 Assessment

In relation to guides the enterprises uses (e.g. including for safari tours, hunts, walks, cultural tours, diving trips, dolphin tours, skippers), determine the following using the information collected to assess Guideline 5:

- Employment: Refer table below and Appendix 1.2

Proportion of guides recruited / used from within +/-20 km of the enterprise.	Refer table (Guides/Rangers) (G)
Proportion of guides that are in-house and external	All in house (H)
Proportion of the total guiding bill paid to guides from within 20 km of the enterprise	Refer table (I)
Proportion of guides who have received training through the company	This year - one guide - FGASA Level 1(J)
Qualifications held relevant to the type of guiding position	FGASA Level 1 (K)
Proportion of guides who had advanced through promotion in the company	One tracker now listed as a manager (L)

Set targets for the enterprise to regularly increase the fees paid to guides for tours run by people from the local area, based in terms of quality, length, experience etc.

- This facility seldom used but could be expanded with local support programme. Since this is infrequent, no targets were agreed to. (M)

Monitor and report the economic contribution to the community for guiding services (in-house and external) over the past year (Refer table for local in-house guiding component). *Alternatively* commit to making an economic contribution to local guiding services, and produce a plan for doing so (<1 page of points)

- The lodge is highly focused on the provision of a good service within its boundaries. It does not presently have the staffing and vehicle capacity to provide outside tours itself. In the event of a structured external guiding program (to venues outside of the reserve) the following is proposed.

Action Plan

- The prospect of providing external community guiding has been contemplated and the following is suggested in regard to local community:
 - Approach the Mnisi tribal authority with the suggestions and request a process to:
 - Select suitable candidates for interview or provide the authority with a list of the types of cultural/other experiences which tourists are seeking
 - Approach other lodges in the area and solicit participation (Through the joint landowners forum)
 - Establishing or identifying representative shebeens, stalls, families, villages for conducted tours. (NB to be located as close to the reserve as possible to minimise transport & time constraints)
 - Determining a method of contact with the necessary guides (Shortage of telecommunications in the area).
 - Discussing appropriate fees payable to the guides and the owners of the intended venues.

- Regulating prices so as to avoid bargaining by tourists and/or over-charging by guides & other venue operators.
 - Enquire as to availability of outside agencies to assist with building capacity and standards requisite for the above
 - Make lists of potential attractions and provide these lists and contacts with an information pack made available in each tourists room. (information pack referred to in other sections pertains to responsible tourism practice)
 - Advise departing visitors (independent road travellers especially) of the possible options whilst travelling to next overnight venue.

Make a list of nearby attractions of cultural interest. Add other attractions (non cultural) for which guiding services could be supplied.

- The closest cultural centre is Shangana near Hazyview but this is too far to qualify as local and would not be suitable for day trips from the lodge on account of the distance.
- Other *local* attractions would include any of those contemplated in the above action plan (which do not exist at present).

Table – Guides/Rangers

Criteria	Narrative	Number	Proportion
Residence	Total No.	3	
	Resident within 20 km (includes resident manager)	2	66.7%
Source	Internal	3	100.0%
	External	0	0.0%
Guides Earnings	Total amount non res (includes manager)	R 64,304.00	
Local content	Within 20 km (Two HDI trackers)	R 24,140.00	37.5%
Number Trained in the current year	FGASA level one	1	33.3%
Promotions	Former tracker now Kayatula corporate lodge manager	1	33.3%

Report on G – N

- Lodge manager doubles as guide using two trackers.
- The two trackers fall outside of the definition of local (<20 km). One only marginally so (23 km). They earn 37,5% of the remuneration paid to rangers/trackers. (The ranger is also the camp

manager and his salary skewed the statistic in favour of the one ranger). The manager received FGASA training during the year

Describe the training / support provided to local guides to improve their quality.

- *'Training of rangers internally is generally ad hoc across the reserve. There is no formal initial training programme for new rangers, and they must have received training and experience elsewhere before arriving at the reserve. The Head Ranger aims to train all rangers within the reserve so that they have all obtained Fghasa [FGASA] Level 3 (Field Guides Association of South Africa) The current situation is that two rangers on the reserve are at Level 2 (for which you need 1 year of experience), three are at Level 3, and two have Special Knowledge and Skills (SKS) – a qualification that deals with dangerous animals. The remaining eight are at Level 1; a grade which every ranger must have to operate legally. According to the Head Ranger, FGASA is the best training system currently available, although it does not include physical training – for that aspect the ranger has to obtain work and experience themselves.*
- *Internal training takes place about once a month, on quiet days when there are few guests. Training may include a day concentrating on bird identification or animal behaviour. The training used to occur more frequently but the lodges have been very busy, and unfortunately training is not perceived to be a priority by the lodges, and therefore insufficient time is allocated to it. Specialist courses are occasionally held, and in February 2001 a soils course was held for the rangers with an external expert brought in. Such courses take place three to four times a year.'* (Source: Spenceley pg. 12)
- However, there is a perception that the industry is becoming more professional since guests expect more and more knowledge and interpretation from their hosts.

Describe how fees for local community guides are structured, in terms of quality, length, experience, etc.

- Paid as standard salaries per industry norm. Guides usually perform well on gratuities and this is an industry expectation

Describe how support of local guides contributes to poverty alleviation and support of historically disadvantaged individuals.

- This issue is addressed in the section on community benefit. The points noted apply equally to this section.

6.2.4 Social Contracts

Develop a local social contract for interactions and behaviour between the local community and tourists (including responsible bargaining), developed with the participation and contributions from the community, and display it prominently for visitors and publicly within the community

6.2.4.1 Output

If there is already a social contract regarding interactions and behaviour between the local community and tourists (including responsible bargaining) then:

- **Report on the contents and nature of the existing contract**
- **Describe how it was developed (especially with respect to consultation with, and consideration of the local community)**
- **Describe how the contract is displayed or advertised for tourists and local communities.**

- **Describe how the contract is reviewed and updated as necessary.**

If there is no contract:

- **Show a commitment to develop a social contract (to include responsible bargaining) and give a deadline for doing so.**
- **Design the process of developing a contract (e.g. to include participation by the local community, where it will be displayed, how it will be communicated to tourists and local people, how it will be reviewed and updated)**
- **Report on whether the enterprise can commit to regularly monitor & report progress.**
- Most of the interaction between lodge/reserve management and the community occurs in ad hoc meetings with the chief and some indunas or councillors. The meetings are used to communicate about various issues regarding land, poaching, crime, ad hoc proposed support and the like. Issues do not necessarily focus on tourism and sustainability but focus more on the maintenance of good neighbourliness between reserves and community. This is borne out by the extracts from market research data included below where 56% of respondents felt that the game reserve respected the community whereas a low percentage (seven out of 314 respondents) reported having had discussions about tourism. Management of the lodge would like to see more tourism related interaction and in future will address this more frequently in these forums.
- *'Members of the community are not involved in management aspects of the protected areas they neighbour, including the Thornybush Game Reserve. However, it was noted that there were village meetings to discuss potential developments in general (87.9%). It appears that all community members are allowed to attend these meetings (80.2%), and the estimates the number of attendees varied from 40 to 600. Most people estimated that between 100 and 200 people would be present, and that the meetings were held on the sports field (64.2%) or at the school (31.9%). There was a split between the number of people who thought that planners and developers could speak Shangaan (44.7% said they could), but the majority said that they used translators to communicate with them (77.9%). The meetings were open for anyone to contribute (89.4%) and 77.9% of the respondents reported that they had contributed in the past.'* (Source: Spenceley 2002)
- *'However, most of the 'authority figures' interviewed noted that they had not been involved in any talks regarding tourism planning in the area. Although a small majority of people thought that tourism companies and developers respected the community (56.4%), only 7 respondents of 314 had been involved in tourism discussions in the area, and these were regarding different development plans such as education at the Southern African Wildlife College, water supply, stopping poaching, and one with regard to a tourism-youth project.'* (Source: Spenceley 2002)
- The issue of formalisation and reporting of a lodge/community interactive approach is a sensitive one, given the number of role players, land owners and other affected parties. Under the circumstances of the study, it was not possible to undertake the task of binding management to set targets and agendas as it would be perceived as outside interference.
- It is worth noting at this point (with no particular relevance to social contact), that all of the sections require the negotiation of targets in each 'responsible tourism'

performance criterion. There is a distinct danger that these targets could be viewed as imposed so the process requires sensitive negotiation and continued mentorship.

- Notwithstanding the writers' experience in this field of study, it was felt that to even enter these discussions about target setting (social contract and other) would risk the success of the cooperation thus far. There is a need not to impose targets on these lodges but to invite (and perhaps sponsor) them to participate. The length of time given to site visit and data collection did not give the required level of confidence to negotiate a long list of performance measures and contracts.

6.3 Environmental Guideline Assessments

6.3.1 Water use

Meter the quantity of water consumed and manage consumption and leakage so as to reduce water consumption by an additional 5% per annum for 3 years, and report water consumption and performance in monitoring.

6.3.1.1 Assessment

Is there any understanding of the implications of water use by the enterprise on surrounding communities?

How much water is used?

Install water meters (or another volume-measuring technique) at water sources and consumption sites (unless they are already present and working).

- None

If there is no mechanism to monitor water volumes, commit to planning and designing a suitable scheme.

- Not considered a priority by management at the moment

Determine whether the enterprises regularly monitors and record the quantity of water consumed.

- No

Set up and use database to record volume of water consumed regularly, and report on volumes used (e.g. monthly over the past year).

- Will be possible in the future once meters fully installed

Design a benchmark for water use that is easy to understand and work out (e.g. volume per bed/night; volume per tourist; volume per month) to record monthly and display to staff.

- Not possible, water volumes not recorded (A)

Report on monthly volumes used and relate variations to changes in water consumption (e.g. weather, additional tourists, construction work), and how your benchmark has changed over the past year.

- No comparatives, water not monitored (B)

Work out associated monthly water costs (e.g. bills, filtering equipment, pumping costs, labour).

- No separate ledger account (C)

Are there any leaks? Ensure the enterprise understands how it might subtract consumption volumes from source volumes to identify leakages. Then they may fix leaks where they are identified, in order to minimise wastage of water reduce water costs (e.g. in pumping, filtering etc)

- Not aware of any leaks

Saving water and money!

- **Set targets to reduce water consumption by a minimum of 5% per annum for 3 years (e.g. reduce consumption by 10 litres per bed/night) (D)**
- **Design management strategies with the enterprise to reduce water consumption to reach the targets by managing use and installing low-water use equipment (e.g. consider water-saving taps & showerheads; small dual-flush toilet cisterns; grey water re-cycling; educating guests and staff; appropriate garden design & reducing the need for watering; collection of rainwater; use of laundry, dishwasher loads; pool covers) (< 1 page of points). (E)**
- **Describe appropriate technology used, and determine whether it can be maintained at the location, or expertise can be sought locally. Encourage the enterprise to train staff to maintain the equipment internally.**
- **Monitor and report on water savings *and* associated cost savings made. (F)**
- **Work out how quickly water saving equipment will be paid off, in terms of predicted water cost savings. (G)**
- **Are guests and staff made to understand the importance of water conservation through education? Is information provided to enable them to contribute to this objective?**
- **Is staff given the opportunity to devise plans for reducing consumption, with awards for successful ideas?**

6.3.1.2 Outputs

Report on what facilities and systems are in place to monitor water consumption (or plans to implement them.

- Plans install water flow meters

Report on A – G, with B and F if possible (e.g. if a monitoring system is already in place, and monitoring data has been collected):

- Water is obtained from two sources: (1) The Klaserie river at an annual cost of R 700. and (2) from boreholes.

- In the case of (1) The raw water is stored in a holding dam and filtered for use in the lodge. As the cost to the company is minimal and the quantity is relatively unlimited, the incentive to use water sparingly is low. The storage dam also serves the dual purpose of being a waterhole for wildlife. As a storage facility, the dam is relatively large and it is likely that evaporation and seepage accounts for high water loss.
- In the case of both (1) and (2), no flow meters are used and water reduction targets have not been implemented.
- Management estimate that Jackalberry lodge and staff quarters use approximately 12,000L of water per day. As much as two thirds of the daily consumption may be used on the lawns and gardens.
- Garden water is routed from raw water tanks before filtration and other water is run through a filtration process. Sprinklers are timed to come on in late afternoon evening which improves soil penetration and reduces evaporation. The raw water used in the garden is from the river and poses no pollution threat to the environment.
- Since water is obtained at low cost, savings methods have not been contemplated. Management would have to adopt such measures through an environmental ethic. This would entail reducing the extent of the lawns, which are considered a necessary aesthetic for the chalets scattered around the site. For the same reasons as above, staff and guest awareness of water conservation is low but guests are verbally requested (if they choose) not to have towels washed every day.

Showcase staff and guest water conservation education activities, and any reward schemes for conservation:

- None

Show that the use of appropriate, maintainable technology has been used.

- In order to provide sufficient water pressure, due to storage tanks being at ground level, the lodge must use a booster pump (most of them activate at 4 – 5 bars pressure). The flow rate of the showers increases substantially as a consequence of this requirement. In a water audit performed on another lodge, it was demonstrated that guest water usage was reduced by 50% by dispensing with the booster pump, but this could only be done if sufficient gravity pressure was available. Gravity pressure from raised storage tanks would run at between one and two bars resulting in much lower water flow rate and consumption but this would be at the expense of good safety precautions in the event of a fire where higher pressure is required. All in all the most appropriate bulk flow systems are in place. The lodge could do more to reduce usage with the utilization of small water savings devices (and these would be used in a desert environment) but tourism requires certain aesthetics, maintenance of grounds being the principal one – and this is not easily remedied in the short term.
- Unfiltered raw dam water bypasses the filter system for purposes of irrigating the garden.

- It is estimated that of the daily consumption of 12,000 litres, roughly two thirds is used on the in the garden. This is the best system under the circumstances.

Action Plan for reduction of water consumption:

In chalets:

- Notices for guests advising the importance of water conservation
- Reduced flow devices on shower heads and taps
- Installation of smaller cisterns or full flush/half flush lever systems
- Daily washing of towels/linen on guest request only, otherwise at end of each guest's stay or every third day.

Within lodge environment:

- Fitting of volume flow meters to document and monitor actual usage
- Staff awareness program for water conservation. (Presentation by management)
- Signs erected in kitchens, ablutions and staff quarters advising of above (Plus methods of restricting water usage).
- Use of horizontal axis washing machines which use less water
- Recycling of grey water which can be used for watering gardens.
- Use of pool covers

Farm:

- Use of reports from environmental reports to maximise water and grazing opportunities by rotation of pans.
- Construction of smaller concrete pans to reduce evaporation and water dispersion into the ground.

6.3.2 Energy use

Measure electricity consumption and introduce energy saving measures to achieve 5% reduction in use per annum over three years. This can be done by for example dimming lights, using low energy appliances and light bulbs and enhancing the use of natural ventilation

6.3.2.1 Assessment

Although 'electricity' is noted in the guidelines, it is important to reduce the use of all fuels, to save money and reduce impact on the environment. In addition to electricity, monitor consumption of other fuels used. The example for *electricity* is used here, but **repeat**

assessment for other fossil fuels used such as gas, diesel, petrol, and paraffin in the same way.

How much electricity is used?

Set up and use database to record electricity consumed (e.g. monthly as bills arrive).

- Refer appendix 1.5 and consumption tables in text.

Report usage and electricity cost from fuel bills (in kWh).

- Refer appendix 1.5 and consumption tables in text.

Design a benchmark for electricity that is easy to understand and work out (e.g. kWh per bed/night; usage per tourist; usage per month) and record monthly and display to staff.

Electricity consumption figures

- The following table requires that management insert three variables
 - Usage in kwh
 - Cost
 - Bed nights sold in month
- The output provides averages in
- kwh and cost
- Line one (Jan) is presented as an example and the table may be adapted for actual figures.

Electricity monitoring plan for Jackalberry lodge (includes Kayatula)									
Month	INPUT			Beds	Tourist capacity in month (bed nights)	OUTPUT			
	Usage per month (kwh)	Electricity Cost per month	Bed nights sold for month (electricity statement to be used for reading dates)			Use per bed per month (KwH)	Cost per bed per month	Use per bed/night occupied (KwH)	Ave' cost per bed night used
					3650				
Jan	15,141	R 5,147.94	188	10	304.17	1,514	R 515	81	R 27.38
Feb	-	-	-	10	304.17				
Mar	-	-	-	10	304.17				
Apr	-	-	-	10	304.17				
May	-	-	-	10	304.17				
Jun	-	-	-	10	304.17				
Jul	-	-	-	10	304.17				
Aug	-	-	-	10	304.17				
Sep	-	-	-	10	304.17				
Oct	-	-	-	10	304.17				
Nov	-	-	-	10	304.17				
Dec	-	-	-	10	304.17				

Report on monthly electricity usage and relate variations to changes in energy consumption (e.g. due to weather, additional tourists, construction work), and how your benchmark changes:

- The appendix refers to monthly usage calculated at a per bed and per guest night consumption rate. Management do not keep records of these statistics - they had to be calculated during the site visit. As a consequence there is no seasonal or daily monitoring to ascertain cycles of use (I)

Saving energy and money!

Set targets to reduce electricity consumption by a minimum of 5% per annum for 3 years (e.g. reduce consumption by 10 kWh per bed/night).

- No targets agreed to (J)

Design management strategies with the enterprise to reduce electricity consumption to reach the targets by managing use and installing low-energy use equipment (e.g. water-saving taps & showerheads; insulated pipes, water tanks, fridges and ovens; set thermostats on boilers at optimum temperatures; use of natural lighting and ventilation; dim lights, or use low-energy fluorescent bulbs)

- Staff are conscious of energy cost and neither lights nor air conditioners are allowed to run unnecessarily. (K)

Describe appropriate technology used, and determine whether it can be maintained at the location, or expertise can be sought locally. Encourage the enterprise to train staff to maintain the equipment internally.

- None used, electricity is managed by a savings approach. Management considers this an issue of staff relations and encouragement rather than the reliance on automatic devices.

Monitor and report on energy savings *and* associated cost savings.

- n/a (L)

Work out how quickly energy saving equipment will be paid off, in terms of predicted electricity cost savings.

- n/a (M)

Are guests and staff made to understand the importance of energy conservation through education? Is information provided to enable them to contribute to this objective?

- No written information is given but they are made aware of the cost of running all appliances and they are instructed to keep usage to a minimum. Examples are unnecessary use of fans or air conditioners.

Is staff given the opportunity to devise plans for reducing consumption, with awards for successful ideas?

- No

6.3.2.2 Outputs

Refer to table below for consumption figures:

Consumption figures/ bed and per guest bed night given in the table below

Electricity consumption for Jackalberry lodge (includes Kayatula)				
Usage (Kw)/month	Electricity Cost/Month	Use per month (KwH)	Use per bed/month (KwH)	Use per bed/night used (KwH)
15,141	R 5,148	15,141	1,514	87.92
		The true average consumption/bed here is skewed due to the inclusion of Kayatula in the electricity invoice.		
		NB: Staff quarters included in the Jackalberry invoice but farm and office excluded.		
Hydrocarbons				
Average monthly	Cost/Month	Litres/Month	Cons. per bed/month (litres)	Cons per bed night used (Litres)
Paraffin	R 83	30	3	0.17
Petrol/Diesel	R 8,667	2,476	248	14.34
Gas (in kg)	R 653	139	14	0.81
Only recently installed (in kitchen at Jackalberry). No long term cons' figures.				

Showcase staff and guest energy conservation education activities, and any reward schemes for conservation:

- None applied

Show that the use of appropriate, maintainable technology has been used:

- See notes above

6.3.3 Renewable Energy

Set targets to increase the proportion of energy used from renewable resources – for example solar, wind, hydroelectric (increase by 10% over 3 years). Sustainable use of wood, from indigenous and plantation forests is complex, and great care needs to be taken.

6.3.3.1 Assessment

List renewable sources of energy that are currently used (e.g. solar, wind, sustainable forestry). Ascertain options with the enterprise for increased use of renewable energy resources, and what they would be most useful for (e.g. windmills for pumping groundwater through boreholes; solar power for electric fences; solar power for water heating/lighting)

- Solar panels are used to power the electric fences, other than this there are no renewable energy sources used in the lodge.

Set targets to increase the proportion of energy used from renewable resources by 10% over 3 years, and devise a plan to meet these targets.

- None exist, management will have to be assisted and need to buy into this concept formally (N)

Describe appropriate technology used, and determine whether it can be maintained at the location, or expertise can be sought locally. Encourage the enterprise to train staff to maintain the equipment internally:

- None

Monitor and report on energy savings *and* associated cost savings:

- Not available (O)

Work out how quickly renewable energy equipment/technology will be paid off, in terms of predicted electricity/gas/diesel/paraffin (etc) cost savings:

- Not available (P). Refer below for cost savings methods

Are guests and staff made to understand the importance of renewable energy through education, and provided with information to allow them to maximise its effective use:

- No, but possible in future (Q)

6.3.3.2 Outputs

Report on renewable sources of energy that are used (or plans to use them), and what they are used for.

- Wood used for fires is taken only from bush clearing activities. The lodge is economical in the use of this wood (poma fires only) and there is a high level of awareness in regard to its sustainability – bearing in mind the number of users in the reserve.

- No solar or wind energy sources are in use other than the panels used to power the electrified fences.

Report on N – Q, with O reported if information is available regarding savings over the past year.

- Gas was installed in the kitchen, this is thought to have reduced energy costs and is more environmentally friendly but the savings could not be quantified.
- Low wattage bulbs were installed but they were found to be blowing. Whether this was due to Eskom power surges or not is unknown but the incidence has caused the lodge to revert to normal globes
- Other electricity savings can be achieved through hot water geyser management (lowering thermostat levels, switching off when there are no guests), hot water pipe insulation, good management of fans/air conditioners, (Switched off while guests on drives).

Tables demonstrating potential savings on lighting shown below.

Table 4.7: Dim and Save (Hassol, 1994a)		
Incandescent Lighting	Electricity Saved	Extends Lamp Life
10 % dimmed	5%	2 times
25% dimmed	15%	4 times
50% dimmed	30%	20 times
75% dimmed	50%	Over 20 times

Potential Compact Fluorescent Bulb savings for Jackalberry Lodge (Spenceley 2002)				
	Incandescent bulb (100 W)	Equivalent Compact Fluorescent (21 W)	Incandescent bulb (60W)	Equivalent Compact Fluorescent (12 W)
Rated lamp live (hours)	1000 h	8000 h	1000 h	8000 h
# lamps used over 8,000 hours	8	1	8	1
kWh used over 8,000 hours	800 kWh	168 kWh	600 kWh	96 kWh
Operating cost per 8,000 hours*	R267.52	R56.18	R200.64	R32.10
Retail cost per bulb (labour free)	R2.99	R43.99	R2.99	R43.99
Bulb costs per 8,000 hours	R23.92	R43.99	R23.92	R43.99
Total life-cycle costs per fitting	R291.44	R100.17	R224.56	R76.09
Number of bulbs in use (Lodge)	24	24	46	46
Total life-cycle costs for Jackalberry Lodge light fittings	R6,994.56	R2,404.07	R10,329.76	R3,500.25

Potential life-cycle savings from energy saving bulbs, over 8,000 hours	R17,324.32 – R5,904.32 = R11,420 (No energy saving) (All energy saving)
<i>Estimated lodge savings per annum</i>	8000 h ÷ 6 years ÷ 365 days = 3.65 hours light per day Assume average usage for all bulbs is 3.65 hours per day R11,420 savings ÷ 6 years = R1,903.33 saved per year <i>Or R190.33 saved per bed per year</i> <i>Or savings of 66% for lighting costs</i>
* Assuming that 1 kWh costs R 0.3344	

Show that the use of appropriate, maintainable technology has been used.

- The activities of the lodge are oriented towards the use of electricity. This may not be considered environmentally appropriate but the existence of this facility is convenient, cheaper and probably reduces the immediate environmental cost of inefficient use of other fossil fuels to achieve the same ends.

6.3.4 Waste management

Set percentage targets and time scales for the reduction of waste produced, levels of recycling and reuse of waste from the enterprise. Set appropriate targets for reduction and/or recycling of waste produced per year for paper (5%), plastics (5%), metal (5%) and glass (5%). Report on progress towards 15% targets over 3 years

6.3.4.1 Assessment

List activities currently working to (a) reduce waste produced, (b) re-use, and (c) recycle at the enterprise (e.g. purchasing goods with minimal packaging, & packaging that can be recycled or re-used). (R)

Aim to reduce *total waste* produced by 15% over 3 years. (In terms of volume or weight)

Aim to increase recycling of *total waste* produced by 15% over 3 years.

Aim to reduce *paper, plastic, metal and glass* waste by 5% per year for 3 years (e.g. 15% total reduction after 3 years).

Aim to recycle *paper, plastic, metal and glass* waste, and increase the amount by an additional 5% per year for 3 years (e.g. 15% total increase after 3 years).

Design and report on strategies and actions to reach *each* of the targets:

- Everything is packaged so buying is difficult (S)

Engage the active participation of staff in designing strategies and actions to reduce/reuse/recycle.

Consider what can be done in all aspects of the enterprise (e.g. kitchen, office, housekeeping, garden/land, tours/trips, purchasing agreements)

Consider the use of activities such as community recycling schemes, providing suitable waste for craft ware (e.g. plastic bags used to make weaved mats); or giving waste food to local pig farmers:

- Refer to commentary below on waste disposal and action plan

Communicate the strategies to staff and tourists, in such a way that they understand the importance of the activity, and of their participation in the process.

Regularly report on progress towards targets to staff, guests and other stakeholders.

6.3.4.2 Outputs

Report on R-S

- The lodge is aware of the need to dispose of solid waste in a responsible manner. As with a number of compliance and target procedures, the lodge would need mentorship in planning the proposed reduction process. At present, organic waste is composted, paper and plastic is incinerated and bottles/glass are removed for recycling. In this much the lodge is acting responsibly but would welcome a brief proposal on how waste reduction could be achieved.

Showcase ways in which staff have participated in designing ways to reduce/reuse/recycle Showcase activities that have benefited local communities (e.g. community recycling; craft ware).

- Bottles and glass are separated and placed in bins. These are collected from six lodges on weekly basis by Royal Malewane where they are stored for collection. A community member empties the bins once a month and takes the waste to Acornhoek. The destination of the refuse thereafter is unknown. It is presumed that the waste is being sold on to other recycling agencies. A Danish initiative to inter-alia dispose of waste appears to have degenerated as the facility, including a can crushing machine has fallen into disuse. Management have spoken to Collect-a-Can who have indicated that if collection and central drop off can be coordinated. It could be viable for them to extend their activities to cover the area but this requires orchestration from a greater number of participants.

Show how staff and tourists are educated in the importance of their participation in the process.

- Importance of conservation is communicated on an ad hoc. basis by rangers. The lodge manager is responsible for ensuring that waste is properly separated and placed in the appropriate bins. He checks that this is being adhered to.

Action Plan for waste disposal

- Presentation to all Jackalberry staff (lodge and farm) on the implications of waste disposal and the impacts, highlighting the possibilities of mitigating impact through change of habit.

- Wherever solid waste is disposed (kitchen/staff quarters, private lodges, etc.), ensure that containers are immediately available for on site waste separation. (Avoids the unpleasant task of later separation).
- Ensure that a separate designated area is set aside in one place on the farm for any toxic waste e.g. oils, batteries etc.
- Establish a roster system to ensure individual responsibility for waste separation and disposal with daily, weekly inspections as appropriate and follow up by management to police the system.
- Provision of details of waste disposal to guests indicating their role in waste disposal, energy, water conservation etc.
- Staff should be monitored for the following.
 - Ensure biodegradable waste pits are regularly covered with brush and soil.
 - Fenced to prevent intrusion by wildlife
 - Only biodegradable waste is placed in pits and all other categories are sorted and placed in the designated sites for removal or incineration.
- Management should perform the following.
 - Instruct verbally and provide written guidelines on responsible waste disposal and the rationale behind these guidelines
 - Monitor the cycle of removal of recyclable waste from the reserve and clearly identify the recycling agent to ensure that the waste is simply not dumped elsewhere
 - Provide the necessary containers, transport and equipment to ensure that staff can fulfil their obligations
 - Ensure that the quantities of waste collected are recorded and noted by a responsible collection agent for monitoring of waste volumes.
 - Implement a points system of reward credits for responsible waste disposal and apply a series of incentives to encourage a non-pollution oriented philosophy amongst staff.
 - Introduce the ideas and concepts presented in their waste reduction efforts to all farm and lodge owners within the reserve
 - Consider stock items which offer reduced waste production through bulk buying or the purchase of goods that are sold in recyclable containers.
- In planning targets for waste recycling the lodge should aim for the following:
 - Within year one, introduce a total waste system that allows for complete separation of all waste

- By the end of year one ensure that all recyclable waste has a responsible agent for collection of the waste. And that the high reward waste must be collected together with the lower reward waste.
- That periodically the outcome of waste collection is recorded by reference to the appointed end user agent to compare volumes despatched from the lodge & delivered to recycling depots for each category of waste.
- In planning for waste reduction the lodge should attempt to:
 - Influence suppliers through bulk purchasing
 - Convert to the use of as many containers that carry deposits or are categories suited for recycling.
 - Implement a system that measures the bulk of such waste (in barrels, bags, skip jacks or whatever) over designated periods and records this data against occupancy in bed nights to produce a total waste figure which is meaningful.
 - Find alternative uses for waste that is not practically recyclable but has secondary uses
 - Invite local community to collect any such waste as deemed useful for domestic or other use.
 - Refer to guidelines provided by Wastetech and Pickitup programs designed to minimise pollution impact.

6.3.5 Investment in conservation

Invest a percentage of profits or turnover in species conservation or habitat restoration and management. Report the investment, and try to increase this by 5% per year.

- Note that one method of investing in conservation is through a levy, with a committee determining how the money generated is spent. The committee could ideally consist of representatives from the relevant management authority and the tourism operation. The tourism operation could also channel additional voluntary contributions for projects that they find attractive, either financed by the enterprise or donations from guests.

6.3.5.1 Assessment

Determine the percentage of profits or turnover that were invested in species conservation or habitat restoration and management over the past year.

- Southern Thornybush Wildlife and Property Management Company is newly formed and has yet to determine budgets for these purposes (T)

Determine other investment in species conservation or habitat restoration and management over the past year (e.g. in terms of labour, equipment, donations):

- The figures are for part year only. The management company's accounts have not yet been fully disaggregated from the lodge accounts. Total farm (non-lodge) income from fees to Dec 2001 (part year) was R196,400 Ecological surveys cost R 15,500 (U)

Report the investment, and what source the funds came from:

- Southern Thornybush landowners are charged a fee for property management, this includes road maintenance, erosion protection. The fees were paid by farms Ridgeway, Waterbuck and Xilutsi (V).

Aim to increase the investment by 5% per year, using a financially sustainable scheme:

- The lodges will probably invest at a rate exceeding this but this will be determined in due course.

Design a plan and strategy to increase the investment to reach the target, listing potential conservation and restoration programmes the enterprise would like to support, in addition to individuals and groups to contact. (< 1 page) (W)

- The reserve as a whole and Jackalberry Lodge's owners and directors specifically, are engaged in creating a private game reserve that will provide an experience that competes with the best of big five game reserves in South Africa, providing tourists with a rounded experience of Africa's bushveld attractions.
- The rationale behind the purchase and restoration of old farming land is to create a reserve that has sufficient habitat diversity and hectareage to enable the reserves owners to *inter alia*:
 - Provide for the natural expansion of wildlife populations
 - Return degraded farming land to wildlife which in most cases is proven to yield the best economic advantage to surrounding communities.
 - Give the reserve the means to carry endangered mammal species requiring large home ranges. e.g. wild dogs
 - Provide the means to carry a large population of tuberculosis free buffalo which may in the future prove to be a far sighted investment in one of Africa's fabled big five.
- In the light of the above comments the following should be noted:
 - The lodge, its owners and it's neighbours are already making a substantial contribution that matches the criteria discussed in this section. viz. 'conservation and restoration programmes'. It would be excellent if Thornybush could extend its conservation measures beyond its own boundaries but at present it has a seriously committed long-term task to achieve this with its own land. In absolute and in relative terms the lodge and the reserve as a whole are allocating as much capital as budgets will allow to the upkeep and restoration of the reserve and this excludes private owner capital committed to the purchase and re-incorporation of contiguous farming land.
- Issues of relevance to the lodge may be:

- Water management. The planning of dam and pan rotation to spread the utilization of grazing by water dependent species.
- Elephant population growth plan.
- Predator management, allowing a better predator balance to develop and having less predominance of lions (provided the habitat is conducive)
- Use of scientific bush clearing methods that focus on the renewability of the wood used for fires in the lodges *and* are scientifically sustainable for the habitat chosen for clearing.
- Understanding of the relationship between animal and plant biomass ensuring optimal carrying capacity
- Drought plan for the reserve in the event of severe food and/or water shortage throughout the reserve.
- Fire plan as per above.

6.3.5.2 Outputs

Report on T-W & showcase how tourists have been encouraged to invest in conservation or restoration

- Some lodge groups have sophisticated structures allowing them to collect and manage donor funding and apply these funds to worthy social or environmental causes.
- This is done through professionally managed guest campaigns requiring the input of many labour hours and high printing costs. Small lodges like Jackalberry may find this sort of exercise difficult in practice and the scale of effort involved is not cost beneficial.
- Many tourists make assumptions, not unreasonably, that the price of their stay covers the cost of maintaining the environment in which they are being accommodated. Unless informed in writing though, that there is a relationship between their usage and a responsibility to environment, this is conveyed casually with no guarantee that the message is effective.
- Again, in bigger lodge groups there are budgets to cover brochure printing, resource centres, libraries, lectures and other forms of awareness creation though cognisance of this information is still of the guest's volition.
- One way of drawing this specifically to guests' attention is by including a minor levy for community/conservation development. Many lodges have mandatory community levies though few have environmental ones.

6.3.6 Reducing negative impacts

Work with conservation authorities to ensure that visitors to natural heritage areas are aware of the impacts that they may have on the ecology of the area and how they should behave in order to minimise those impacts.

6.3.6.1 Assessment

List ways in which the enterprise has worked with conservation authorities or industry bodies (e.g. diving bodies; safari groups) to ensure that visitors to natural heritage areas are aware of the impacts that they may have. (X)

Very little but see comments in 'outputs' below

Determine whether the operation has obtained up-to-date information on best practice regarding minimising negative ecological impacts on natural areas that are used during operation (e.g. photographic safaris; hiking; hunting; diving; whale watching)

No, no guidelines available on best practice although the work previously done by Anna Spenceley on her thesis highlighted areas for improvement in the lodges approach to triple bottom line responsibility. The management felt that the report (insofar as it pertained to them) was too detailed.

Has the operation informed visitors *and* staff of best practice to minimise their impacts, and the potential implications (locally and globally) of not behaving responsibly?

No.

Have penalties been considered for visitors and staff in serious breaches of best practice?

No

6.3.6.2 Outputs

- The landowners in Thornybush all contribute pro-rata to the Thornybush Wildlife and Property Management Company.
- Included in its (TWPMC's) activities and budget responsibilities are habitat maintenance, dam construction, erosion protection and anti-poaching. During the year under review, R 15,500 was expended on ecological studies to assess the condition and carrying capacity of the grass sward in various parts of the reserve.
- Although there is no specific budget for game purchases, the reserve embraces an ethic which seeks to provide visitor satisfaction through the delivery of good game sightings. The investment in this experience is ongoing.
- As a private game reserve, contact with conservation authorities is limited. The reserve once sought incorporation into the Timbavati Private Game Reserve and hence KNP but the landowners were unable to meet the requirements of KNP and the

Association of Private Nature Reserves who require that a certain minimum hectareage be added and that a number of lease related formalities were fulfilled. Thornybush is unable at present to guarantee compliance at present.

- Lately, with the realisation of the value of holding disease free buffalo stock, the incentive to join has diminished with the realisation of the commercial value of the herd - which would run the risk of infection if incorporated with Timbavati and KNP where fences were removed in 1993.
- The following extracts from: (Spenceley, 2002, pp. 35-36) elaborate:

'Dams and Pans: It was recommended that waterholes were not pumped every year in order to conserve water and also decrease intensity of grazing year after year. This would also potentially control the numbers of impala and warthog (which increase rapidly with water provision; Venter & Wright, 1990). This is also critical since the rate of current and historical pumping is unknown, and boreholes may potentially run dry in time. Swemmer (1999) recommended that no more dams should be constructed on the reserve, but additionally required water points should be pumped when required, and located in suitable areas. Monitoring of vegetation condition around waterholes would allow landowners to cease pumping when wildlife impact reached a certain level. He notes that given staff and guests at the time, 18 camps needed to supply up to 312 people with water...

'There is currently no monitoring of the impacts of tourism on the reserve, such as behavioural changes on wildlife, impacts of artificial water provision on animal distribution and vegetation damage, or the impacts of off-road driving. Therefore, it is not possible to currently determine what environmental tradeoffs are being made for the financial benefits of tourism. However, it is clear that the presence of the reserve itself, and the generation of revenue from wildlife viewing and hunting has allowed the reserve to survive as a habitat for game, rather than reverting to its former cattle and tobacco farming use. Since Jackalberry Lodge relies upon repeat business, it is very important to maintain quality and consistency in terms of wildlife viewing, behaviour and habitat condition.

'Rehabilitation efforts that have been implemented by management have been financially costly (e.g. gabions and piping to minimise water erosion around roads; rehabilitation of old roads and waste tips) but no monitoring of their recovery, though photographs or surveys, has occurred. Therefore, the actual progress of recovery, and selection of best techniques is not possible for future work.'

- Although the above states that post rehabilitation results of these and other habitat conservation initiatives are not being measured, it is clear from the budget allocations that roads, erosion, bush encroachment and other forms of habitat maintenance are the prime concern of the land management company. To neglect these aspects would imperil the quality of the wildlife experience and management are very conscious of this in the use and allocation of the available budget. The incorporation of new farms from time to time is one patent method of ensuring capacity for growth in game stock.
- In regard to tourist awareness of this process: Guiding activities usually include (informal) commentary on the role and need for natural heritage protection, conversion of farming land to game reserves etc. This is frequently communicated on game drives where the ranger explains the origins and history of the land making up the Thornybush Reserve. This heightens tourist awareness of conservation. In addition, FGASA (Field Guides Association of South Africa) sets a standard of knowledge applicable to

environment and ecology. As guides progress through the FGASA system of certification, so too does the diversity of their knowledge which inevitably reflects in the quality of general information received by visiting tourists.

- Projects making a major contribution to conservation:
 - The breeding of TB free buffalo.
 - Conversion of Ridgeway farm from cattle & tobacco farming activities back to wildlife. It is now incorporated in the reserve

Showcase the up-to-date information on best practice that is used to minimising negative ecological impacts on natural areas that are used during operation.

Apart from the findings of this report and the work programs and targets suggested within this report, there is no accepted or standard industry best practice guideline.

Best environmental practice is usually ensured (not always) by a combination of guidelines provided by ecologists commissioned to report on the ecological state of the property and make recommendations re: carrying capacity,

National legislation may cover the sale of hunting rights, protected/endangered species, disease management, erosion protection, alien vegetation, pollution control etc. but these are not incorporated under any industry applied code of conduct within one framework e.g. wildlife tourism operators. Private land owners are largely responsible for their own ecological practices which results in the disparities experienced between one game farm and another.

The tourism white paper produced by DEAT in 1996 does provide bullet point guidelines for responsible tourism (with regard to environment) but they are of a very generic nature.

The difficulty in conducting temporally based audits on land usage and the lack of enforcing legislation have resulted in a largely deficient body of work re the policing of environment in the private game ranch sector.

The recent enactment of regulations regarding EIA's for new property development could be used as a guideline but fail to regulate existing properties within ecological and environmental framework.

The best practice guidelines would be those emerging from this report after debate and consideration of the relevance of each item.

Describe how visitors and staff are informed of best practice, and any penalties:

They are not informed of best practice guidelines and no penalties exist within the system (specific to tourism).

7 DISCUSSION

Refer section nine for discussion and accompanying recommendations.

8 CONCLUSIONS

The purchase of goods and services: the managers of the lodge would like to support local and HDI business but very few of such exist in the area and those that might, do not meet quality and reliability standards.

Community issues: in general, managers and owners of private lodges understand the rationale of a program such as advocated in this study but struggle with the how's of executing them. Like the communities they are seeking to empower, they may also require mentorship in the transformation of their businesses.

The management at Jackalberry display a willingness to engage with community and in community related projects but like many small lodges they claim limitations:

- Budgetary and financial (often determined by the owners and not the managers)
- Resource constraints – lack of time to pursue community development and transformation activities
- Lack skill and capacity to engage and persevere with projects
- In the case of Jackalberry, they manage the lodge(s) and the land, adding an additional tier of responsibility and time commitment

In the case of privately owned game reserves there are fewer motivations to drive community process. This was attributed to the following:

- Lack of congruence in the policy of separate land owners with different agendas
- Unwillingness of landowners to go beyond certain budgets (financial or resource)
- No joint land ownership or lease arrangements between community and landowners
- Lack of state support/intervention and/or donor funding.

Nonetheless, the greater reserve has implemented a compulsory contribution from each land owner to the local Ilkley environmental school. In addition to this, various contributions have been made by Jackalberry to local or regional causes, Other than school funding, managers and lodge owners have not been able to instigate and support community training, development, skills acquisition & enterprise development.

The implementation of energy saving methods and responsible waste disposal: these activities are fairly clearly defined and require changes in attitude plus in some instances straightforward financial cost-benefit decisions. The lodge is not under any financial pressure to implement energy saving investments (exception, installation of gas in the kitchen). It is perceived that electricity is the most convenient energy source and at present, they will manage the unnecessary use of power. Usage is not monitored in detail.

Likewise with water, borehole and river water is unlimited and obtained at a low cost. Whilst this does not imply a lack of interest in good water management on the part of the managers and staff, there is little perception of its cost and hence less incentive to

accurately monitor usage. This area of environmental management does not receive much attention.

Solid waste is responsibly separated and disposed of but the destination of bottles and cans removed from the property is unknown.

9 RECOMMENDATIONS

9.1 Defining the nature, scope and extent of responsible tourism practice

The application of all of the guidelines by a single lodge operation represents the best standards scenario. It is recognised that the intention of this study is to produce achievable goals in each of the categories of quantifiable measurement, Economic, Social and Environmental.

‘Targets should be realistic (requiring achievable significant change) and fit within the national framework to enable DEAT to report annually on progress towards achieving the national targets.’

(National Responsible Tourism Guidelines for the South African Tourism Sector, Version 3 - January 26 2002, *Methodology for case study assessments application of the guidelines to the nature based tourism sector*)

Viewed from the point of the researcher or individuals appointed to audit participant lodges (informed by the standards developed by Responsible Tourism Practices body), the methods and tests adopted could be structured in such a way that the programme of work can be condensed to two A4 pages, noting the following in regard to guidelines ‘Auditing and monitoring will need to be conducted in an inexpensive, rapid and participatory way. It is anticipated that sub-sector and enterprise *guidelines* will not be more than two sides of A4 and that they will contain roughly equal proportions of economic, social and environmental objectives and targets’ (National Responsible Tourism Guidelines for the South African Tourism Sector, Version 3 - January 26 2002, *Methodology for case study assessments application of the guidelines to the nature based tourism sector*)

It is not unreasonable to expect then that an audit procedure can likewise be designed to a two-page version focusing on key measurement criteria. These audit procedures may have to be adapted for limited audits where the lodges are not able, for whatever reason, to commit to all of the proposed guidelines and targets (unless they become legal or industry membership requirements).

Recommendation: In order to secure maximum participation from the industry, a design method could be considered that follows a pattern dependent on the level of participation secured from individual lodges canvassed. This ranges from full cooperation and commitment through limited cooperation to no cooperation. (Possibly through compliance with own or other standards).

9.2 Design and implementation of audit procedures and measurement criteria

The audit programme in this study focuses primarily on relative standards i.e. setting percentage improvement targets in all three performance areas. In the case of Jackalberry lodge, these targets would not be unreasonable given the extent of scope for improvement. Other lodges however may be adhering to high levels of responsible tourism practice and may only be able to offer marginal improvement. This may only be ascertained through the setting of absolute standards.

Recommendation: The standard setting committee/forum should understand the distinction between relative and absolute performance measurement standards. Design of standards and targets should take into account:

- Proximity of lodge to target communities and employee residences
- Proximity of lodge to suppliers of goods and services
- Extent of state cooperation in the lodge venture
- Access to donor funding, support, mentorship for the lodges
- Land tenure or ownership rights held by community (incl. land claims)
- Official; Individual owner, Lodge, (Group)Company, Game Reserve policy in regard to one/all of the three performance areas
- Degree of buy in and commitment from lodges (moral commitment)
- Extent of lodge's responsibility for habitat & reserve management
- Community equity in the venture
- Absolute profitability of the lodge & financial capacity

The list is not exhaustive but the above criteria will exert considerable leverage on a lodge's ability to meet either relative or absolute performance levels. Hence, the need to consider whether audits can be flexible enough to factor these into performance evaluation levels.

9.3 Assistance programs to lodges – economic objectives

In some instances, recommendations for the meeting of certain standards may be relatively easy to implement e.g. making tourists aware of water conservation in dry habitats. In others, e.g. community support programs, many small lodge operators may be trying to implement changes but have limited skill, capacity and financial/human resource bases, Jackalberry lodge being a good case in point.

Jackalberry and associated lodge operations are expected to make sufficient profits to cover both the lodge and the farm management expenses (which explains why it incurs losses at relatively high occupancy levels)

Some lodge owners and operators e.g. Wilderness Safaris and Conservation Corporation have access to their own donor structures, foundations and trusts to sponsor development programs. In addition, by virtue of their size and economies of scale, they have internal financial and staff resources specifically allocated to community development projects (social or economic). It is likely that lodges managed by these organisations would in some cases be meeting and exceeding relative and absolute standards.

The Jackalberry lodge managers would willingly purchase goods and services from local HD organisations and individuals but it is currently beyond their skill and capacity to mentor small business development programs. In discussions with the local chief and

indunas, various small business opportunities have been suggested. But this requires the four critical elements for success:

- Committed desire of motivated individuals to pursue business opportunities
- Mentorship, training and capital during the development process
- Willingness of the lodge to consume the products or services
- Delivery of quality, consistency and in most instances price competitive product

Recommendation: In order to successfully implement and achieve a range of target economic obligations to adjacent communities, some of the participants (lodges) will require mentorship themselves. The forum should include this topic for debate as to how this can be done within the structure or failing that, what other resources and organisations can be accessed.

9.4 Community needs & interaction with lodges

Social requirements & contributions may vary from area to area. If practically possible and within the means of commercial lodges to deliver, they should consider how communities prioritise their needs and try to deliver on those by order of priority.

e.g. The Timbavati community around Thornybush GR have very poor water infrastructure. Any contributions in this domain would achieve a high level of local awareness for the lodge/game reserve (even the importance of tourism to the community) and its commitment to upliftment in the area.

Recommendation: Any proposed social assistance from the lodges should be discussed and workshopped with appropriate local community representatives. Lodges should be provided with guidelines on how to assess and canvass community priorities that serve as many target community members as possible. Consider:

- Infrastructure, water, power, roads
- Educational assistance, primary, secondary, tertiary, vocational, mentorship etc.
- Health, free clinic, sponsorship of periodic visits from nurse/doctor. AIDS counselling etc.
- Small business development, dev. of craft industry, service providers etc.
- Construction & building skills
- Agricultural assistance (e.g. Jackalberry ploughs fields for local community)

Responsible Tourism Guidelines should provide a recognised list of project categories & methods of canvassing these requirements – (matched to budgetary commitment from Lodges)

9.5 Notes on repetition in the guideline questions

There are a number of questions asked in different sections through the study that overlap e.g. community benefits.

Recommendation: These should be consolidated into one section, reporting (1) Financial benefits to community plus details and (2) Other community support and if a value can be estimated then record that with details.

9.6 Notes on detailed work procedures

General:

- Ensure that reviewers are properly trained, familiar with accounting records, financial statements etc., industry terminology & properly equipped with own computer resources.
- Establish whether lodge will prepare all (or limited information) of their own volition
- Setting up an audit: Establish whether accounting records are kept off site – if so, suggest separate visit to office where accounting records are kept & make appointments with accounting staff via management.
- Conduct on site review subsequent to above, management can assist with on site information and any queries from above.

9.6.1 Economic Guidelines Assessment

9.6.1.1 Enterprise purchasing

In the case of Jackalberry Lodge & associated lodges, the work program for the audit was found to be too detailed. The lodge managers provided full cooperation but noted that it took too much of their time.

Recommend: In such cases the procedure should be limited to measurement of key indicators to be debated at the workshop

9.6.1.2 Purchase of local goods & curios

Local craft may not be available (e.g. Jackalberry Lodge) or may be available but has no appeal to tourists.

Recommend: That purchases from any HDI's or organisations be recognised as a contribution to empowerment. (Noting that the lodge would be encouraged to develop local capacity)

Definition of HDI's.

Does the definition cover crafts/products/services rendered or sold by individuals outside of South Africa

Recommend: Provide adequate definition of HDI's

9.6.1.3 Employment

Data Requirements:

As per above for purchasing, the level of detail required is high, asking for classification of each employee, distance of residence from lodge etc.

Recommend: Extent of data collected could be condensed allowing a quicker review without compromising results e.g. employee interviews were not possible within the scope

of this assignment – discuss in forthcoming workshop. Recommend analysing a sample month of wages and using the wage records in conjunction with a management interview.

9.6.2 Environment and water usage

During the review management agreed that they were conscious of the environmental cost but, as yet, no monitoring process was in place.

Recommendation: The audit tests performed should focus on water saving devices or practices. Many lodges do not have meters, being supplied by river, dam, and borehole water.

In the case of municipal supply it would be possible to monitor through water statements but this is uncommon in the lodge environment. A short list of water saving measures could be supplied to the lodge.

10 REFERENCES

Spenceley A, 2002, *Sustainable Nature-Based Tourism Assessment, Jackalberry Lodge, Thornybush Greater Game Reserve*, Phd working paper

10.1 Personal communications & interviewees

Kevin Godding, Managing Director, Jackalberry Lodge

Sue Godding, general manager, Jackalberry Lodge

10.2 Contact details

Piers Relly

P O Box 1037

Saxonwold 2132

Tel: 083 - 2667067

Eddie Koch

Box 5529

Nelspruit

1200

083 - 2674633

11 APPENDICES

11.1 Appendix 1: Data Analysis – Jackalberry Lodge

(Attached as excel file named database case study)

Appendix 1.1 (sheet 1) Enterprise Purchasing

Appendix 1.2 (sheet 2) Employment

Appendix 1.3 (sheet 3) Community

Appendix 1.4 (sheet 4) Water

Appendix 1.5 (sheet 5) Energy