

# **Standing Requirements**

## **Mission Statement**

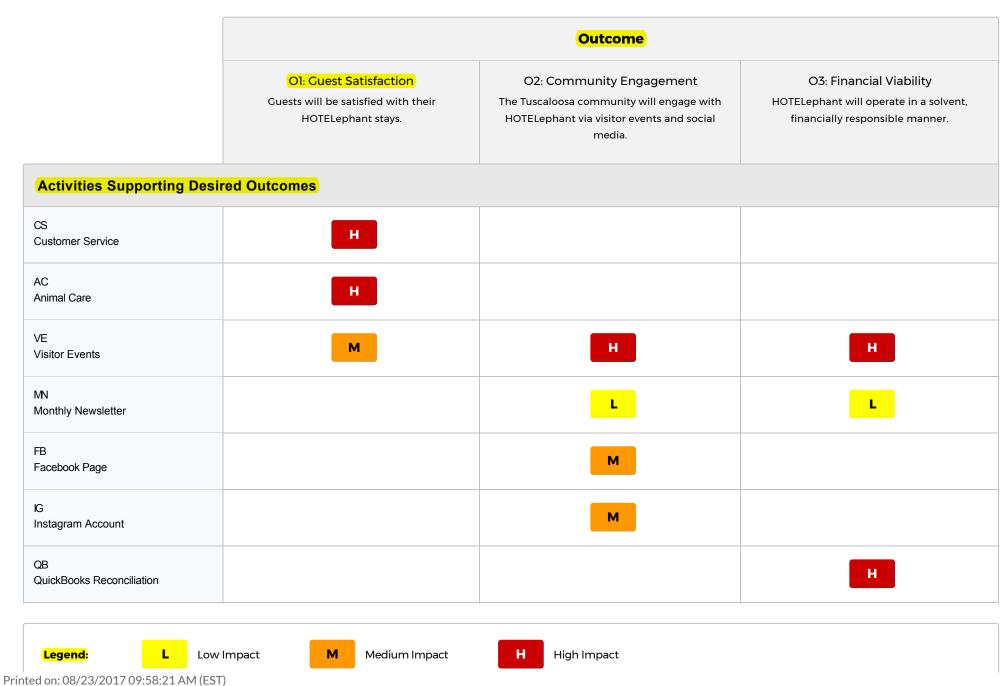
HOTELephant is committed to providing our elephant guests with comfortable, satisfying, and affordable stays. Through social media and events for the public, we also strive to engage, delight, and inspire support from the Tuscaloosa community.

# Operational Outcomes (1-lvl)

HOTELephant Outcome Set			
C	Outcome		
	Outcome	Mapping	
	O1: Guest Satisfaction Guests will be satisfied with their HOTELephant stays.	<b>UA Strategic Plan 2016:</b> Objective 2.3 Continuous Improvement Process	
	O2: Community Engagement The Tuscaloosa community will engage with HOTELephant via visitor events and social media.	<b>UA Strategic Plan 2016:</b> Objective 2.5 Community-Engaged Research	
	O3: Financial Viability HOTELephant will operate in a solvent, financially responsible manner.	<b>UA Strategic Plan 2016:</b> Objective 2.2 Research Infrastructure	

Activity Map (optional) (Here you can create a visual snapshot (table) of activities that support outcomes.)

**Active Curriculum Maps** 



created with 5 taskstream



# 2016-2017 Assessment Cycle

# **Assessment Plan**

#### **Mission Statement**

HOTELephant is committed to providing our elephant guests with comfortable, satisfying, and affordable stays. Through social media and events for the public, we also strive to engage, delight, and inspire support from the Tuscaloosa community.

#### **Measures**

# **HOTELephant Outcome Set**

Outcome

**Outcome: O1: Guest Satisfaction** 

Guests will be satisfied with their HOTELephant stays.

#### **▼ Measure:** M1.1 Monthly Guest Satisfaction Surveys

Details/Description of Measure (what, when, where, how):

Near the end of each month, we ask current guests to complete our satisfaction survey (attached) in Qualtrics. There are 6 questions on a 1-4 response scale (1 peanut = poor; 2 peanuts = OK; 3 peanuts = good; 4 peanuts = superb), plus a few open-ended questions.

Expectation of Achievement/Target:

For each Likert question, we expect to see ratings of 3.5 or better (averaged across guests). Openended questions are reviewed for trends in what we're doing well and what we could do better.



Schedule for Data

Collection/Evaluation

(e.g., every 2 years):

To avoid survey fatigue, we ask guests about their satisfaction monthly. Their responses and suggestions are reviewed, analyzed, and shared with staff monthly. Areas for improvement are incorporated into ongoing professional development activities. For reporting purposes, we aggregate results annually.

Key Personnel (e.g., for collecting or rating data):

The hospitality team updates and administers the survey.

# **Supporting Attachments:**

Monthly survey from April 2016 (Word Document (Open XML))

#### **Measure:** M1.2 Exit Interviews with Departing Guests

Details/Description of Measure (what, when, where, how):

Guests typically stay with us for a semester. Near the end of each stay, we invite each guest to have a "farewell chat" with a member of the hospitality team (snacks provided). The attached script is used as a way to standardize the exit interviews. Although we hope to hear good things about HOTELephant, the script is also designed to elicit suggestions for improvement.

Expectation of Achievement/Target:

We expect that feedback will be generally positive.

Schedule for Data Collection/Evaluation (e.g., every 2 years): Exit interviews are conducted in November and April. The interviews are recorded, transcribed, and analyzed qualitatively. Themes are shared with staff and used to generate improvement plans. For reporting purposes, we aggregate results annually.



Key Personnel (e.g., for collecting or rating data):

The hospitality team conducts the exit interviews and works with the marketing team to analyze the data.

# **Supporting Attachments:**

Script for Exit Interviews (Word Document (Open XML))

# **▼ Measure:** M1.3 TripAdvisor Ratings

Details/Description of Measure (what, when, where, how):

hen, submit reviews of hotels they've stayed in. The overall rating scale ranges from 1 to 5. Based on the reviews, the website generates rankings

within each hotel category.

Expectation of Achievement/Target:

We expect our overall rating to be at least 4.8 out of 5. We also expect to maintain or improve our ranking compared to similar hotels.

TripAdvisor is an independent site where travelers

Schedule for Data Collection/Evaluation (e.g., every 2 years): We monitor TripAdvisor regularly. For reporting purposes, we record data annually (May 15 of each year).

Key Personnel (e.g., for collecting or rating data):

The hotel manager is responsible for monitoring TripAdvisor.

# **Supporting Attachments:**

TripAdvisor page (Web Link)
https://www.tripadvisor.com/Hotel\_Review-g471846-d306240-ReviewsElephant\_Plains\_Game\_LodgeSabi Sand Game Reserve Kruger National Park.html



# **Outcome: O2: Community Engagement**

The Tuscaloosa community will engage with HOTELephant via visitor events and social media.

▼ **Measure:** M2.1 Number of Community Visitors

Details/Description of Measure (what, when, where, how): For each HOTELephant event, we track the number of visitors (noting categories such as adult/child and new/returning). We distinguish between general events that are open to the public (e.g., afternoon tea) and special/private events (e.g., for an elementary school class or UA student group). Visitors are asked to sign in at the reception desk; if they provide an email address, we add them to our newsletter list.

Expectation of Achievement/Target:

Target numbers will vary by event type; we collected baseline data in 2016-17. Our general expectation is that visitor numbers will increase over time, in a sustainable way.

Schedule for Data
Collection/Evaluation
(e.g., every 2 years):

Attendance is tracked at each event, and every week the log book entries are transferred to our electronic database. The numbers are aggregated monthly and reported annually.

Key Personnel (e.g., for collecting or rating data):

The hospitality team handles initial data collection; the marketing team maintains the electronic database.

Measure: M2.2 Social Media Engagement



Details/Description of

Measure (what, when,

where, how):

We collect metadata from 3 social media channels: Facebook (number of friends),

Instagram (number of followers), and our webbased quarterly newsletter (number of visits).

**Expectation of** 

Achievement/Target:

We expect to increase each engagement metric

over time.

Schedule for Data

Collection/Evaluation

(e.g., every 2 years):

Key Personnel (e.g., for collecting or rating

data):

Monthly tracking and updates to staff; annual

reporting.

The marketing team is in charge of social media

projects and data.

# **Supporting Attachments:**

HOTELephant Newsletter (Web Link)

## **Outcome: O3: Financial Viability**

HOTELephant will operate in a solvent, financially responsible manner.

#### ▼ Measure: M3.1 Operational Costs

Details/Description of Measure (what, when,

where, how):

Each summer, an expense budget is established for the coming year. Expenditures are tracked

continuously in Quickbooks.

**Expectation of** 

Achievement/Target:

In the 2016-17 budget, expected costs were

\$220,000.



Schedule for Data
Collection/Evaluation
(e.g., every 2 years):
Key Personnel (e.g., for collecting or rating data):

We reconcile and review the hotel balance sheet monthly.

The accounting team is responsible for all financial data and reporting.

#### **▼ Measure:** M3.2 Revenues

Details/Description of Measure (what, when,

where, how):

Expectation of Achievement/Target:

Schedule for Data
Collection/Evaluation
(e.g., every 2 years):
Key Personnel (e.g., for collecting or rating

data):

Revenues come mainly from three sources: private donations, hotel stays/purchases, and fees for special events.

We strive to increase revenue from private donations every year. As gift-based revenues go up, residency rates for our guests can be reduced

accordingly.

We reconcile and review the hotel balance sheet monthly.

The accounting team, in conjunction with the marketing team, tracks all donations and other sources of revenue.

# **Assessment Findings**

#### **Finding per Measure**

# **HOTELephant Outcome Set**

Outcome

**Outcome: O1: Guest Satisfaction** 

Guests will be satisfied with their HOTELephant stays.



## ▼ Measure: M1.1 Monthly Guest Satisfaction Surveys

Details/Description of Measure (what, when, where, how): Near the end of each month, we ask current guests to complete our satisfaction survey (attached) in Qualtrics. There are 6 questions on a 1-4 response scale (1 peanut = poor; 2 peanuts = OK; 3 peanuts = good; 4 peanuts = superb), plus a few open-ended questions.

Expectation of Achievement/Target:

For each Likert question, we expect to see ratings of 3.5 or better (averaged across guests). Openended questions are reviewed for trends in what we're doing well and what we could do better.

Schedule for Data Collection/Evaluation (e.g., every 2 years): To avoid survey fatigue, we ask guests about their satisfaction monthly. Their responses and suggestions are reviewed, analyzed, and shared with staff monthly. Areas for improvement are incorporated into ongoing professional development activities. For reporting purposes, we aggregate results annually.

Key Personnel (e.g., for collecting or rating data):

The hospitality team updates and administers the survey.

# **Supporting Attachments:**

Monthly survey from April 2016 (Word Document (Open XML))

## Findings for M1.1 Monthly Guest Satisfaction Surveys

#### **Summary of Findings:**

Aggregated satisfaction ratings from 2016-17, by survey question, were as follows: Staff = 3.74; Comfort = 3.50; Food = 3.54; Amenities = 3.52; Events = 3.49; Visitors = 3.46. Thus all average ratings met or nearly



met our expectation of 3.5 on the 4-point scale, with Visitors being a primary area for further analysis.

# Analysis/Interpretation of Findings:

We looked more closely at the ratings to identify trends by semester and month. Of note, Staff were consistently rated high. Satisfaction with Comfort, Amenities, Events, and Visitors was generally lower in spring than fall, sometimes by as much as half a point. This pattern, in conjunction with quest feedback and exit interviews, revealed several opportunities for improvement in the future. For example, because elephants are tough on furniture we need to update/replace certain items more frequently (March Amenities = 2.92). Spring guests requested that the pool to be open all semester. And in April, some elementary school visitors were not adequately prepared/supervised, as they attempted to climb the elephants' trunks (Visitors = 2.90).

# Impact of Previous Actions on Results:

Food ratings were initially low last fall (August = 3.25; September = 3.32). Follow-up conversations with that cohort of guests indicated some food preferences and dietary restrictions of which we had not been aware. Menu changes led to improved guest satisfaction later in the fall (November = 3.80). and with the next cohort of guests (Spring = 3.54).

# **Substantiating Evidence:**

@Satisfaction Survey Results 2016-17 (Excel Workbook (Open XML))

# These Findings are associated with the



Key Personnel (e.g., for collecting or rating data):

The hospitality team conducts the exit interviews and works with the marketing team to analyze the data.

# **Supporting Attachments:**

Script for Exit Interviews (Word Document (Open XML))

## Findings for M1.2 Exit Interviews with Departing Guests

#### **Summary of Findings:**

Guests expressed a positive opinion of the hotel. The initial interview questions ask (1) whether the guest is likely to return for another stay, and (2) whether s/he would recommend the hotel to other elephants. Without exception, all interviewees (N=26) answered those questions in the affirmative.

# Analysis/Interpretation of Findings:

Results from the initial questions met our expectations. Subsequent survey questions ask participants to think about different aspects of their hotel experience and discuss things they liked as well as things that could be improved. Thematic analysis of the interview transcripts indicated several areas of strength (friendliness of staff; footballrelated visitor events; holiday meals; afternoon tea; involvement in social media; the swimming pool area). There were also suggestions for improvement that dovetailed with some of the response patterns observed in Measure 1.1 (monthly surveys). Spring guests in particular suggested that the pool be open all semester, that compromised furniture be replaced more quickly, and that more sports-events be added. The full findings from the exit interviews were summarized in a report (attached) that was...



**Expectation of** We expect our overall rating to be at least 4.8 out Achievement/Target:

of 5. We also expect to maintain or improve our

ranking compared to similar hotels.

Schedule for Data Collection/Evaluation (e.g., every 2 years):

We monitor TripAdvisor regularly. For reporting purposes, we record data annually (May 15 of

each year).

Key Personnel (e.g., for collecting or rating data):

The hotel manager is responsible for monitoring

TripAdvisor.

# **Supporting Attachments:**

TripAdvisor page (Web Link)

https://www.tripadvisor.com/Hotel Review-g471846-d306240-Reviews-

Elephant Plains Game Lodge-

Sabi Sand Game Reserve Kruger National Park.html

# Findings for M1.3 TripAdvisor Ratings

**Summary of Findings:** On May 15, 2017, our TripAdvisor rating was

> 5.0 (maximum score, presumably rounded up from 4.96 or 4.97, etc.). Within our hotel

category, we were ranked #15 of 42.

Analysis/Interpretation

of Findings:

The 2017 rating exceeded our expectation of 4.8, and it also exceeded our 2016 rating of 4.9. Our ranking moved up from #17 to #15

this year. Although the changes in

rating/ranking were small (and possibly not very meaningful), they were in the desired

direction.

**Impact of Previous Actions on Results:**  We have no way of knowing what specific changes/initiatives (or sampling variation) may have influenced our improved TripAdvisor statistics. We'll continue our daily efforts to make guests comfortable and satisfied.



Key Personnel (e.g., for collecting or rating data):

The hospitality team handles initial data collection; the marketing team maintains the electronic database.

#### Findings for M2.1 Number of Community Visitors

**Summary of Findings:** In 2016-17 (August through April), our visitor

counts were:

Public Events (52)

Adults=474 Children=922

Private Events (14)

Adults=72 Children=163

These numbers (which are broken down by month in the attached spreadsheet) do not reflect a notable increase over 2015-16.

Analysis/Interpretation of Findings:

Public events consisted mainly of afternoon tea (held 1-2 times per week on various days) and monthly/seasonal themed events. Afternoon tea attendance was highest on Thursdays (fall) and Saturdays (spring). Our most popular themed events included Thanksgiving, Fall football parties, and a "Swim with the elephants" event we tried in March.

Most of the private events involved visits from UA student groups or elementary school

classes. Going forward, we'd like to

strategically increase the number of private events (especially adult-centered ones) and the rate of attendance at public events.

Impact of Previous Actions on Results:

**Substantiating Evidence:** 

#### Findings for M2.2 Social Media Engagement

#### **Summary of Findings:**

Results at the end of 2016-17:

Facebook: 614 followers Instagram: 292 followers Newsletter: 333 web visits

Facebook and Instagram followers are up from last year (by about 10% each), but the newsletter page has been visited slightly

less than last year.

Analysis/Interpretation of Findings:

The pattern of quarterly newsletter website hits was similar to last year, which means we didn't extend our community reach. That's unfortunate because upcoming events are advertised in the newsletter, so more readers would likely translate into more event visitors. Although the ~10% increase in Facebook and Instagram followers is encouraging, we want to increase those numbers more dramatically since there's a positive correlation between social media numbers and private donations.

Impact of Previous

Actions on Results:

These Findings are associated with the following Actions:

Capstone Agency
Consultation
(Action Plan; 20162017 Assessment
Cycle)



#### **Outcome: O3: Financial Viability**

HOTELephant will operate in a solvent, financially responsible manner.

# ▼ **Measure:** M3.1 Operational Costs

**Details/Description of** Each summer, an expense budget is established

Measure (what, when,

where, how):

for the coming year. Expenditures are tracked continuously in Quickbooks.

**Expectation of** In the 2016-17 budget, expected costs were

**Achievement/Target:** 

\$220,000.

Schedule for Data

Collection/Evaluation

(e.g., every 2 years):

Key Personnel (e.g., for collecting or rating

data):

monthly.

We reconcile and review the hotel balance sheet

The accounting team is responsible for all

financial data and reporting.

#### Findings for M3.1 Operational Costs

**Summary of Findings:** Expenditures for 2016-17 were \$242,000, or

9% above the projected amount (\$222,000).

Thus we did not meet our target.

Analysis/Interpretation

of Findings:

The balance sheet (attached) was reviewed monthly, and again at the end of the year, by our management and accounting teams. The main reasons for going over budget were (1) requested menu changes in the Fall, (2) the need to replace furniture sooner than we expected (Spring), and (3) an unexpected



increase in peanut prices (January). Looking ahead, the 2017-18 budget will need to be adjusted to reflect the above changes as well as some new initiatives (e.g., keeping the pool open year round as requested by Spring guests).

Impact of Previous Actions on Results:

# **Substantiating Evidence:**

Balance Sheet (Excel Workbook (Open XML))

#### ▼ Measure: M3.2 Revenues

Details/Description of Measure (what, when,

where, how):

Expectation of Achievement/Target:

Schedule for Data
Collection/Evaluation
(e.g., every 2 years):
Key Personnel (e.g., for
collecting or rating

data):

Revenues come mainly from three sources: private donations, hotel stays/purchases, and fees for special events.

We strive to increase revenue from private donations every year. As gift-based revenues go up, residency rates for our guests can be reduced accordingly.

We reconcile and review the hotel balance sheet monthly.

The accounting team, in conjunction with the marketing team, tracks all donations and other sources of revenue.

Findings for M3.2 Revenues



**Summary of Findings**: 2016-17 revenues were \$198,000, up about

3% over last year. Technically, our

expectation was met. However, the increased

revenues did not offset increases in expenditures. Thus guest rates for the coming year will have to go up, which is

never our goal.

Analysis/Interpretation

of Findings:

The pattern of donations was similar to 2015-16. We didn't see many new donors, which is part of a larger theme in this year's data (e.g., most of our adult visitors were returning friends of the hotel). Our supporter base grew steadily from 2011 to 2015, but

now it appears to have leveled off.

Impact of Previous
Actions on Results:

**Substantiating Evidence:** 

MBalance Sheet (Excel Workbook (Open XML))

These Findings are associated with the following Actions:

Change in Target (Action Plan; 2016-2017 Assessment Cycle)



While we did well with guest satisfaction in 2016-17, it's clear that we can do more in certain areas to make hotel stays more enjoyable (e.g., keeping the pool open year round; diversifying our elephant menus; holding certain kinds of public events more often). Of course, these initiatives will cost money, and the need for them comes at a time when our support base has leveled off and the gap between costs and revenues has increased. Our challenge is to improve amenities/events and expand engagement/giving while keeping costs down.

# **Action Plan**

#### **Mission Statement**

HOTELephant is committed to providing our elephant guests with comfortable, satisfying, and affordable stays. Through social media and events for the public, we also strive to engage, delight, and inspire support from the Tuscaloosa community.

#### **Actions**

#### **HOTELephant Outcome Set**

Outcome

#### **Outcome: O1: Guest Satisfaction**

Guests will be satisfied with their HOTELephant stays.

#### **▼ Action:** Accelerated Furniture Replacement

## This Action is associated with the following Findings

#### Findings for M1.1 Monthly Guest Satisfaction Surveys

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)

#### **Summary of Findings:**

Aggregated satisfaction ratings from 2016-17, by survey question, were as follows: Staff = 3.74; Comfort = 3.50; Food = 3.54; Amenities = 3.52; Events = 3.49; Visitors = 3.46. Thus all average ratings met or nearly met our expectation of 3.5 on the 4-point scale, with Visitors being a primary area for further analysis.

## Findings for M1.2 Exit Interviews with Departing Guests

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)



## **Summary of Findings:**

Guests expressed a positive opinion of the hotel. The initial interview questions ask (1) whether the guest is likely to return for another stay, and (2) whether s/he would recommend the hotel to other elephants. Without exception, all interviewees (N=26) answered those questions in the affirmative.

Action, Initiative, or

Strategy for

Improvement (details):

Elephants can be tough on furniture. Going forward, we'll adopt a more aggressive furniture

maintenance/replacement schedule. Pool

furniture will be replaced each semester (rather than each year), and furniture within the hotel will be more frequently monitored and (whenever necessary) replaced. We believe that we'll save

money in the long term by focusing on

preventive rather than deferred maintenance.

**Implementation Plan** 

(timeline):

This change will begin immediately.

Key/Responsible

Personnel:

Maintenance team, hospitality team

**Budget approval** 

required? (describe):

Estimated cost of pool furniture replacement

(spring): \$2,000

Estimated cost of indoor furniture replacement:

\$8,000

**Budget request amount:** 

\$10,000.00

**Priority:** 

High

#### ▼ Action: Keep Pool Open Year-Round

# This Action is associated with the following Findings

Findings for M1.1 Monthly Guest Satisfaction Surveys

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)

**Summary of Findings:** 

Aggregated satisfaction ratings from 2016-17, by survey question, were as follows: Staff = 3.74; Comfort = 3.50; Food = 3.54; Amenities = 3.52;



Events = 3.49; Visitors = 3.46. Thus all average ratings met or nearly met our expectation of 3.5 on the 4-point scale, with Visitors being a primary area for further analysis.

# Findings for M1.2 Exit Interviews with Departing Guests

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)

#### **Summary of Findings:**

Guests expressed a positive opinion of the hotel. The initial interview questions ask (1) whether the guest is likely to return for another stay, and (2) whether s/he would recommend the hotel to other elephants. Without exception, all interviewees (N=26) answered those questions in the affirmative.

Action, Initiative, or

Strategy for

Improvement (details):

Historically, we have closed the pool from December through February. Based on the

feedback of Spring guests, we will still close the

pool in December (when we have no guests) but

reopen it in January. We'll also invest in some heat lamps for the pool area. The fact is, elephants like to swim in all seasons and

weather.

Implementation Plan

(timeline):

Heat lamps will be purchased in this Fall, and

after winter break the pool will reopen for the

first full week of January 2018.

Key/Responsible

Personnel:

Maintenance team

**Budget approval** 

Estimated cost of heat lamps: \$3,000

required? (describe):

Estimated cost of Jan/Feb pool upkeep: \$1,600

Budget request amount: \$

\$4,600.00

**Priority:** 

High



The Tuscaloosa community will engage with HOTELephant via visitor events and social media.

#### **▼ Action**: Capstone Agency Consultation

# This Action is associated with the following Findings

Findings for M2.1 Number of Community Visitors

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)

#### **Summary of Findings:**

In 2016-17 (August through April), our visitor counts were:

Public Events (52)

Adults=474

Children=922

Private Events (14)

Adults=72

Children=163

These numbers (which are broken down by month in the attached spreadsheet) do not reflect a notable increase over 2015-16.

#### Findings for M2.2 Social Media Engagement

(Assessment Plan and Assessment Findings; 2016-2017 Assessment Cycle)

#### **Summary of Findings:**

Results at the end of 2016-17:

Facebook: 614 followers Instagram: 292 followers Newsletter: 333 web visits

Facebook and Instagram followers are up from last year (by about 10% each), but the newsletter page has been visited slightly less than last year.

Action, Initiative, or

Strategy for

Improvement (details):

As noted earlier, visitor counts and and social media engagement did not increase in 2016-17 as much as we needed them to. Online visits to our newsletter actually decreased. Starting in August 2017, we'll be consulting with the Capstone Agency, a communications firm run by UA students, to develop campaigns to expand awareness and support of HOTELephant.