ATHE Level 5 Management for Travel and Tourism Specification

ATHE Level 5 Certificate in Management for Travel and Tourism (QCF)
ATHE Level 5 Diploma in Management for Travel and Tourism (QCF)
ATHE Level 5 Extended Diploma in Management for Travel and Tourism (QCF)

About ATHE

An Ofqual regulated awarding organisation, providing QCF qualifications in management, health & social care management and travel & tourism management.

We are known for our excellent customer service, efficient support and flexible qualifications that offer diverse progression routes.

Our Qualifications

Our management qualifications are the culmination of expert input from centres, sector skills councils, industry professionals and our qualification development team. We have taken full advantage of the flexibility of the QCF to develop a suite of awards, certificates and diplomas that offer progression from level 4 up to level 7.

Key features of the qualifications include:
- core units that are common to different sectors offering the opportunity for learners to move between sectors or delay decisions as to which area to specialise in
- small qualifications that can be used for professional development for those in employment or for learners who do not have the time to undertake a full time programme
- flexible methods of assessment allowing tutors to select the most appropriate methods for their learners.

Support for Centres

We are committed to supporting our centres and offer a range of training, support and consultancy services including:
- qualification guidance, suggested resources and sample assignments
- an ATHE centre support officer who guides you through the centre recognition process, learner registration and learner results submission
- health check visits to highlight any areas for development
- an allocated ATHE associate for advice on delivery, assessment and verification.

Contents

ATHE QCF Qualifications at Level 5 in this Specification

This document provides key information on ATHE's suite of Level 5 QCF qualifications in Management for Travel and Tourism, including the rules of combination, the content of all the units and guidance on assessment and curriculum planning. It should be used in conjunction with the ATHE handbook "Delivering ATHE Qualifications". Further guidance on resources and assessment is provided separately.

These qualifications have been accredited to the Qualifications and Credit Framework (QCF). Each qualification has a Qualification Accreditation Number (QAN). This number will appear on the learner's final certification documentation. Each unit within a qualification also has a QCF code.

The QAN numbers for these qualifications are as follows:

ATHE Level 5 Certificate In Management for Travel and Tourism (QCF)	600/4715/X
ATHE Level 5 Diploma In Management for Travel and Tourism (QCF)	600/4720/3
ATHE Level 5 Extended Diploma in Management for Travel and Tourism (QCF)	600/4721/5

Accreditation Dates
These qualifications are accredited from 1st March 2012 which is their operational start date in centres.

Entry Requirements
These qualifications are designed for learners from aged 19 and above. However, ATHE does not specify any entry requirements. Centres are required to ensure that learners who register for these qualifications have the necessary skills to undertake the learning and assessment.

Introduction to ATHE's Level 5 QCF Qualifications in Management for Travel and Tourism

Our new qualifications in Management for Travel and Tourism at Level 5 have been developed to conform to the requirements of the QCF, to meet the requirements of the sector and to respond to the needs of our centres.

We provide a flexible route for learners who have already achieved management qualifications at a lower level and for learners who do not have management qualifications, but may have qualifications in other areas and/or prior experience the work place.

Our suite of qualifications is designed to provide:
- maximum flexibility with different sized level 5 qualifications for those who only wish or have the time to initially take smaller qualifications and then build up qualifications over time
- opportunities for learners to develop knowledge and skills, personal qualities and attitudes essential for successful performance in working life
- optional units in particular specialisms that are directly related to learners' current responsibilities or that meet a particular interest and support career development
- opportunities for learners who wish to undertake a full time course of study leading to an Extended Diploma.

Certificate
Our certificate allows learners to develop some of the key skills they need to work in a management role with a mandatory unit and a choice of options.

Diploma
Our Diplomas allows learners to develop the key skills they need to work in a management role with a number of mandatory units together with a choice of options.

Support and Recognition
These qualifications have been developed with the support of centres who are currently delivering qualifications at this level in Travel and Tourism and Management or who plan to do so in the future.

National Occupational Standards
The ATHE Level 5 qualifications in Management for Travel and Tourism provide much of the underpinning knowledge and understanding for the National Occupational Standards in Management and Leadership.

Progression
On successful completion of a Level 5 qualification in Management for Travel and Tourism there are a number of progression opportunities.

Learners may progress to:
- larger qualifications at the same level e.g. from a Certificate to the Diploma or Extended Diploma in Management or related qualification for example the Diploma in Management for Health and Social Care.
- a degree programme in a higher education institution and claim exemptions for some of the units completed.

Recognition of Prior Learning (RPL)
The QCF is based on the principle of credit accumulation and transfer. Within this suite of qualifications, learners have the opportunity to build their achievements from a single unit into a full Diploma.

There will be occasions where learners wish to claim recognition of prior learning which has not been formally assessed and accredited. Centres should contact ATHE to discuss the requirements for RPL.

Support for ATHE Qualifications
ATHE provides a wide range of support. This includes:

- materials on our website to support teaching, learning and assessment
- training events to support the delivery of the qualifications and assessment
- the services of a team of experienced advisors and External Verifiers
- support for business development.

Credit values and rules of combination
The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. There are three sizes of qualification in the QCF:

- Award, between 1 and 12 credits
- Certificate, between 13 and 36 credits
- Diploma, 37 credits and above.

Each unit within a qualification has a credit value and a level. The credit value specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes and met the assessment criteria of a unit. The level is an indication of relative demand, complexity and depth of achievement and autonomy.

Each credit represents 10 hours of learning time. The learning time is a notional measure which indicates the amount of time a learner at the level of the unit is expected to take, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria. Learning time includes activities such as directed study, assessment, tutorials, mentoring and individual private study.   The credit value of the unit will remain constant in all contexts regardless of the assessment method or the mode of delivery. Learners will only be awarded credits for the successful completion of whole units.

Each unit also contains information on guided learning hours (GLH). GLH are intended to provide guidance for centres on the amount of resource needed to deliver the programme and support learners i.e. the time required for face to face delivery, tutorials, workshops and associated assessments.

Each qualification has agreed rules of combination which indicate the number of credits to be achieved, which units are mandatory and the choice of optional units. The rule of combination for each qualification is given below.

ATHE Level 5 Extended Diploma in Management for Travel and Tourism

The ATHE Level 5 Extended Diploma in Management for Travel and Tourism is a 120 credit qualification. Learners must achieve the 5 mandatory units which amount to 75 credits.
At least 30 credits must come from group O1.
The remaining 15 credits may come from either group O1 or group O2

Unit Title	Level	Credit	GLH
Travel and Tourism Organisations in a Global Context	5	15	60
Finance and Funding in the Travel and Tourism Sector	5	15	60
Research Project	5	15	60
Managing communication	5	15	60
People Management	5	15	80
Optional Units (O1)			
At least 30 credits must come from group O1.			
The Management of Visitor Attractions	4	15	60
Passenger Transport Operations	4	15	60
Sustainable Tourism Development	5	15	60
Tourist Destinations	4	15	60
Tour Operations Management	4	15	60
Resort Management	5	15	60
Special Interest Tourism	5	15	60
Optional Units (O2)			
Marketing Principles and Practice	5	15	60
Business Ethics	5	15	60
Personal and Professional Development	5	15	60
Employability Skills	5	15	60
Business Law	5	15	60
Corporate Social Responsibility	4	15	60
Resource Management	4	15	60
Administrative Services	4	15	60
Planning a Work Based Team Project	4	15	60
Planning a New Business Venture	4	15	60
Customer Relationship Management	4	15	60

ATHE Level 5 Diploma in Management for Travel and Tourism

The ATHE Level 5 Diploma in Management for Travel and Tourism is a 60 credit qualification. Learners must achieve the 3 mandatory units which amount to 45 credits and 1 one unit from the optional units making a total of 60 credits to achieve the Diploma.

Unit Title	Level	Credit	GLH
Travel and Tourism Organisations in a Global Context	5	15	60
Managing communication	5	15	60
People Management	5	15	60
Optional Units			
Learners must complete a further 1 unit from the list below to achieve a minimum of 60 credits for the Diploma.			
The Management of Visitor Attractions	4	15	60
Passenger Transport Operations	4	15	60
Tourist Destinations	4	15	60
Tour Operations Management	4	15	60
Resort Management	5	15	60
Finance and Funding in the Travel and Tourism Sector	5	15	60
Special Interest Tourism	5	15	60
Sustainable Tourism Development	5	15	60
Marketing Principles and Practice	5	15	60

ATHE Level 5 Certificate in Management for Travel and Tourism

The ATHE Level 5 Certificate in Management for Travel and Tourism is a 30 credit qualification. Learners must complete the 1 mandatory unit and 1 of the optional units.

Unit Title	Level	Credit	GLH
Travel and Tourism Organisations in a Global Context	5	15	60
Optional Units			
Managing communication	5	15	60
People Management	5	15	60

Guidance on Assessment

For all ATHE qualifications assessment is completed through the submission of internally assessed student work. To achieve a pass for a unit, a learner must have successfully achieved all the assessment criteria for that unit. There are no externally set written examinations attached to any unit.. However, learners taking the Level 5 Extended Diploma in Management for Travel and Tourism will be required to complete a research project.

ATHE will provide a sample assignment for each unit which can be used as the assessment for the unit. We would encourage our centres to develop their own assessment strategies so you have the opportunity to put assignments in a context that is appropriate for your learners. Any assignments that you devise will need to be submitted to ATHE for approval before delivery of the programme. Centres can submit assignments for approval using the 'Centre-Devised Assignment' template documentation available on the ATHE website.

An assignment can relate to a single unit or an integrated assignment. You may incorporate more than one unit in the assignment provided the content of the assignment is clearly mapped to show which assessment criteria from which units are being covered.

Methods of Assessment

ATHE encourages the use of a range of assessment strategies that will engage learners and give them an opportunity to both demonstrate their knowledge and understanding of a topic and to evaluate how they might apply that knowledge in a given context.

We would recommend avoiding an over-reliance on essay writing and that more varied types of assessment are included. This might include assessment through:
- a research activity resulting in the compilation of a report
- an academic paper or article for publication
- the compilation of a case study
- a critical review and evaluation of a chosen company's policies, procedures and systems
- a set project completed for an employer (also known as an 'employer-engagement' activity)
- the production of a portfolio of evidence relating to a particular unit.

This list is by no means exhaustive, but gives examples of some creative assessment methods that could be adopted.

Putting an Assessment Strategy in Place

You will need to demonstrate to your External Verifier that you have a clear assessment strategy supported by robust quality assurance in order to meet the ATHE requirements for registering learners for a qualification. In devising your assessment strategy, you will need to ensure:

- devised assignments are clearly mapped to the unit learning outcomes and assessment criteria they have been designed to meet
- that the command verbs used in the assignment are appropriate for the level of the qualification, e.g. analyse, evaluate
- that the assignment gives the learner sufficient opportunity to meet the assessment criteria at the right level, through the work they are asked to complete. (The QCF level descriptors will be helpful to you in determining the level of content of the assessment)
- students are well-briefed on the requirements of the unit and what they have to do to meet them
- assessors are well trained and familiar with the content of the unit/s they are assessing
- there is an internal verification process in place to ensure consistency and standardisation of assessment across the qualification
- assessment decisions are clearly explained and justified through the provision of feedback to the learner
- that work submitted can be authenticated as the learner's own work and that there is clear guidance on the centre's Malpractice Policy
- that there is an assessment plan in place identifying dates for summative assessment of each unit and indicating when external verification will be needed
- sufficient time is included in the assessment planning to allow the learners time for any necessary remedial work that may be needed prior to certification.

Quality Assurance of Centres

Centres delivering ATHE QCF qualifications must be committed to ensuring the quality of the assessment of all units they deliver, through effective standardisation of assessors and verification of assessor decisions. ATHE will rigorously monitor the application of quality assurance processes in centres.

ATHE's quality assurance processes will involve:
- centre approval for those centres who are not already recognised to deliver ATHE qualifications
- approval to offer ATHE QCF qualifications and units in Management at Level 5.

Once a centre registers learners for a qualification, they will be allocated an External Verifier who will visit at an early stage in the programme to ensure that an appropriate assessment plan is in place.

Centres will be required to undertake training and standardisation activities as agreed with ATHE.

Details of ATHE's quality assurance processes are provided in the ATHE Guide: "Delivering ATHE Qualifications" which is available on our website.

Malpractice

Centres must have a robust Malpractice Policy in place, with a clear procedure for implementation. Centres must ensure that any work submitted for verification can be authenticated as the learner's own. Any instance of plagiarism detected by the External Verifier during sampling, will result in the entire cohort being rejected.

Centres should refer to the ATHE Malpractice Policy on the ATHE website.

Guidance for Teaching and Learning

Within the support materials for some of the units you will find suggestions and ideas for teaching and learning activities which we hope will be helpful in getting centre practitioners started with schemes of work and session plans. You can adapt these ideas to suit your own context and the interests of your students.

Learners learn best when they are actively involved in the learning process. We would encourage practitioners delivering our qualifications to use a range of teaching methods and classroom-based activities to help them get information across and keep learners engaged in the topics they are learning about. Learners should be encouraged to take responsibility for their learning and should be able to demonstrate a high degree of independence in applying the skills of research and evaluation. You can facilitate this by using engaging methods of delivery that involve active learning rather than relying on traditional methods of lecture delivery to impart knowledge.

Your approach to delivery should give the learners sufficient structure and information on which to build without you doing the work for them. In achieving the right balance you will need to produce well-planned sessions that follow a logical sequence.

Top Tips for Delivery
- Adopt a range of teaching and learning methods, including active learning.
- Plan sessions well to ensure a logical sequence of skills development.
- Include study skills aspects, eg. how to construct a report or Harvard Referencing. Build time into your Scheme of Work and Session Plans to integrate study skills teaching.
- Set structured additional reading and homework tasks to be discussed in class.
- Elicit feedback from your students. Get them to identify where the work they've done meets the assessment criteria.
- Contextualise your activities, eg. using real case studies as a theme through the sessions.
- Take an integrated approach to teaching topics across units, where appropriate, rather than always taking a unit-by-unit approach. In this way, learners will be able to see the links between the content of the different units.

There is further guidance on teaching and learning in the support materials.

Resources

ATHE has provided a list of suggested resources for each unit. Please refer to the support materials for each unit on our website.

Access and Recruitment

ATHE's policy with regard to access to its qualifications is that:
- they should be available to everyone who is capable of reaching the required standard
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to ATHE qualifications with integrity. This will include ensuring that all learners have appropriate information and advice about the qualifications. Centres should put in place appropriate systems to assess a learner's suitability for a programme and make a professional judgement about their ability to successfully achieve the designated qualification. This assessment should take account of any support available to the learner within the centre during the programme of study and any support that may be required to allow the learner to access the assessment for the units within the qualification.

Access Arrangements and Special Considerations

ATHE's policy on access arrangements and special consideration aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2011) without compromising the assessment of skills, knowledge and understanding. Further details are given in the Reasonable Adjustments and Special Considerations Policy, which can be found on our website.

Restrictions on Learner Entry

The ATHE Level 5 qualifications in Management for Travel and Tourism are accredited on the QCF for learners aged 19 and above.

Unit Specifications

Unit Format

Each unit in ATHE's suite of level 5 qualifications is presented in a standard format. This format provides guidance on the requirements of the unit for learners, tutors, assessors and external verifiers.

Each unit has the following sections:

Unit Title
The unit title reflects the content of the unit. The title of each unit completed will appear on a learner's statement of results.

Unit Aims
The unit aims section summarises the content of the unit.

Unit Code
Each unit is assigned a QCF unit code that appears with the unit title on the Register of Regulated Qualifications.

QCF Level
All units and qualifications in the QCF have a level assigned to them which represents the level of achievement. The level of each unit is informed by the QCF level descriptors. The QCF level descriptors are available on the ATHE website.

Credit Value
The credit value is the number of credits that may be awarded to a learner for the successful achievement of the learning outcomes of a unit.

Guided Learning Hours (GLH)
Guided learning hours are an indicative guide to the amount of input that a tutor will provide to a learner, to enable them to complete the unit. This includes lectures, tutorials and workshops and time spent by staff assessing learners' achievement when they are present.

Learning Outcomes
The learning outcomes set out what a learner is expected to know, understand or be able to do as the result of the learning process.

5.13 Travel and Tourism Organisations in a Global Context

Unit Aims	This unit aims to develop learners understanding of the issues organisations face operating within a global context. This understanding will allow learners to review the issues currently impacting on businesses. Learners will base some of their work around businesses in a chosen national context.
Unit level	5
Unit code	T/503/8148
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand the context within which global travel and tourism organisations operate	1.1 Analyse key differences between travel and tourism organisations 1.2 Assess the responsibilities of travel and tourism organisations operating globally 1.3 Evaluate strategies employed by travel and tourism organisations to maintain or develop global operations
2 Understand the impact of external factors on the travel and tourism sector	2.1 Analyse how the performance of a national economy impacts on the activities of the travel and tourism sector 2.2 Explain the measures taken by governments to influence the activities of the travel and tourism sector 2.3 Evaluate the effect of national and global events on the travel and tourism sector
3 Understand the impact of global factors on travel and tourism organisations	3.1 Explain the implications of global integration on tourism organisations 3.2 Assess the effect of international tourism on domestic tourism 3.3 Review the impact of the global economy on travel and tourism organisations 3.4 Assess how new technologies have facilitated globalisation of travel and tourism organisations
4 Be able to review current issues impacting on a named travel and tourism organisation that operates globally	4.1 Carry out a review of the global environment in which a chosen organisation in the travel and tourism sector operates to identify current issues 4.2 Propose strategies to address issues affecting the chosen travel and tourism organisation's business activities

Indicative Content

1. Understand the context within which global travel and tourism organisations operate

Key differences
- Overview of the sector – size, value, number of organisations, numbers employed
- Legal status/ownership – eg sole trader, partnership, company, corporation (e.g. limited and unlimited, public limited and international equivalents), joint ventures
- Structure and size – changes in structure and size of tourism businesses due to globalisation e.g. small businesses can promote themselves without the input of larger tourism agencies
- What they offer (products and/or services)
- Where they operate
- Image e.g. eco-tourism, luxury travel, budget etc.

Travel and tourism organisations e.g.
- Travel agency
- Tour operators
- Resort management
- Internet based businesses
- Visitor attractions
- Transport services, transport terminals eg airports
- Government based tourism services etc

The responsibilities of tourism businesses
- to shareholders
- to employees
- to other stakeholders
- to customers
- to the environment
- to people in tourist destinations
- ethical issues
- to Government
- to supply chain – businesses involved in travel and tourism offer

Strategies employed by tourism businesses
- human resources policy
- environmental strategy
- equal opportunities policy
- ethics
- financial policy
- international partnering policy
electronic modes of marketing and communication

2 Understand the impact of external factors on the travel and tourism sector

Changes within a national economy
For example the UK economy
- Size – population, labour market, education/training levels

- Growth/wealth - gross national product (GNP), balance of payments, inflation rates, government borrowing, trade balance, public finances, taxation, national debt, availability of credit
- Business confidence – investing, cost of borrowing, consumer buying/confidence, government policies
- Global patterns of supply and demand for tourism
- Influences on holiday and travel activities of economy, policies etc. e.g. influence on holiday choices – home or abroad, propensity to travel

Government policies
- Monetary policies, interest rates, quantitative easing, unemployment
- Fiscal policies, spending (in central and local government), fiscal policies to encourage tourism or encourage sustainable tourism (e.g. tax on fuels), public sector borrowing, controlling demand, taxation, distribution of income
- Competition Policy – how general policy affects tourism organisations e.g. in airline sector
- Sector regulation e.g. limits on tourism, support for tourism
- Environmental policies – sustainable and ethical tourism
- Regional policies – e.g. development of tourist areas
- Skills agenda, apprenticeships in travel and tourism in UK and similar training programmes internationally
- Visa restrictions/freedom to travel eg Shengen Agreement

National and global events
- Political unrest
- Natural disasters
- Accidents and disasters caused by human error e.g. sinking of Costa Concordia, BP oil spill.
- Major sporting events eg Olympics, world cup

3 Understand the impact of global factors on travel and tourism organisations

Global integration
- trading blocs
- World Bank, IMF, Global/trading bloc policies and directives (e.g.   EU), G20, OPEC and other relevant organisations
- market size
- transnational corporations

International tourism
- Opportunities eg emerging markets and new destinations
- Growth
- Trade duties and tariffs – general and travel taxes e.g. airport tax
- Increased competition
- Increased supply of tourists/visitors

Impact of global economy
- Increased competition –
- Increased customer choice – of destinations and of businesses
- Increased need for innovation in designing travel products
- Economic downturn and upturn

New Technologies
- Remote workforce – advantages of being able to locate workforce in other countries where labour may be cheaper/may have more relevant skills etc.
- The role of the internet in tourism
  - Easy communication eg skype, email, social networking
  - Customer choice – customers can book direct with businesses in destinations, customers can design and book own packages
  - Comparison websites

4 Be able to review current issues impacting   on a named travel and tourism organisation that operates globally

A review
- Domestic tourism market in chosen country
- Global tourism market
- Domestic and global policies e.g. sustainability, ethical tourism, government support for tourism
- Other global factors e.g. war and unrest, natural disasters
- Other issues – fashions in tourism destinations, desire for eco-tourism, costs of air travel etc (eco-costs and financial)
- Characteristics of global travel or tourism business
- Development issues for a global business organisation

Strategies
- New markets
- New destinations
- New environments eg move business
- New technologies
- Growth/shrink
- Change of suppliers, importers, exporters
- Change in business structure eg from sole trader to company/ corporation

Opportunities to deal direct with businesses internationally e.g. smaller hotel groups etc due to ease of communications etc.

5.20 Finance and Funding in the Travel and Tourism Sector

Unit aims	This unit aims to develop learners understanding of the issues organisations face operating within a global context. This understanding will allow learners to review the issues currently impacting on businesses. Learners will base some of their work around businesses in a chosen national context.
Unit level	5
Unit code	J/601/1742
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand the importance of costs, volume and profit for management decision-making in travel and tourism	1.1 explain the importance of costs and volume in financial management of travel and tourism businesses 1.2 analyse pricing methods used in the travel and tourism sector 1.3 analyse factors influencing profit for travel and tourism businesses
2 Understand the use of management accounting information as a decision-making tool in travel and tourism businesses	2.1 explain different types of management accounting information that could be used in travel and tourism businesses 2.2 assess the use of management accounting information as a decision-making tool
3 Be able to interpret financial accounts to assist decision-making in travel and tourism businesses	3.1 interpret travel and tourism financial accounts
4 Understand sources and distribution of funding for public and non-public tourism development	4.1 analyse sources and distribution of funding for the development of capital projects associated with tourism

Indicative Content

1 Understand the importance of costs, volume and profit for management decision-making in travel and tourism

Costs and volume
- Direct and indirect costs
- Fixed and variable costs
- Overheads – allocation and apportionment
- Principles of activity based costing
- Opportunity cost
- Volume of sales
- Break-even analysis

Importance of costs and volume
- Sales
- Profit
- Market position
- Image

Pricing methods
- Cost-plus
- Marginal costing/pricing
- Full absorption costing
- Market led pricing
- Seasonal pricing

Factors effecting profit
- Effects of economic environment e.g. recession, boom etc.
- Effects of government policies e.g. taxation on fuels, airport taxes etc
- Fashions and trends e.g. new products
- Seasonal influences e.g. summer/winter, school holidays, weather
- Social issues – e.g. concern about environment
-

2 Understand the use of management accounting information as a decision-making tool in travel and tourism businesses

Management accounting information
- Budgets and budgetary control
- Cash flow forecasts
- Management accounts
- Variance analysis
- Statistical information about sales, costs etc.

Decision-making uses
- Raising finance
- Management of working capital
- Forecasting sales/profits/costs
- Investment appraisal
- Assessing profitability

- Evaluating achievement against objectives
- Pricing

3 Be able to interpret financial accounts to assist decision-making in travel and tourism businesses

Financial accounts
- Statement of financial performance (income statement)
- Statement of financial position (balance sheet)
- Statement of cash flows
-

Interpretation
- Comparisons – year on year, business to business, business to industry averages
- Calculating ratios – profitability, liquidity, efficiency, gearing, investor
- Interpretation of ratios
- Weaknesses of ratio analysis
- Consideration of effects of non-financial factors e.g. social and environmental issues

4 Understand sources and distribution of funding for public and non-public tourism development

Sources and distribution of funding e.g.
- Banks
- Government funding
- European social funds
- Regional development funds
- Lottery funding
- Venture capitalists
- Internal sources
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Types of funding e.g.
- Retained profits
- Debt
- Equity
- Sale and leaseback

Projects e.g.
- Heritage sites
- Tourist information centres
- Activity centres – theme parks, leisure facilities etc
- Regeneration
- Infrastructure projects

5.4 Research project

Unit aims	To formulate a research specification on a chosen topic, implement the research project, evaluate and present the research findings
Unit level	5
Unit code	A/503/8152
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Be able to select a topic for research	1.1 Identify a suitable area for research 1.2 Justify your choice 1.3 Determine the aims and objectives of the research project 1.4 Assess ethical considerations that apply to the chosen area of research
2 Understand how different research methods are used	2.1 Critically compare different methods of research 2.2 Evaluate methods that can be used to collect data 2.3 Identify tools that can be used to analyse data 2.4 Explain the importance of validity and reliability of data within research
3 Be able to conduct a research project	3.1 Formulate a detailed plan 3.2 Identify sources of support for conducting a research project 3.3 Select research methods for the project 3.4 Develop research questions 3.5 Conduct research, using identified research methods 3.6 Record and collate data
4 Be able to analyse research findings	4.1 Use data analysis methods to analyse data 4.2 Draw conclusions from findings 4.3 Make recommendations related to area of research
5 Be able to present the research outcomes	5.1 Use an agreed format and appropriate media to present the outcomes of the research to an audience
6 Be able to evaluate the research outcomes	6.1 Evaluate the findings of the research and the process used 6.2 Review own learning and development from project

Indicative Content

1 Understand how to formulate a research specification

Formulating the research specification
- Identifying the purposes of the research
- Having clarity about the outcomes that will be delivered at the end of the research
- Rationale for the choice of the research including skills and knowledge to be gained
- Criteria for choice of research
- Consideration of ethical issues
- Methodology for conducting the research e.g. sources of information, primary and secondary; data collection and analysis

Creating the research project specification:
- Clarify and confirm purposes and outcomes of research
- Statement of the research question
- Identifying what is to be included in the scope of the research and what is to be excluded
- Planning
- Deciding on specific tasks which need to be completed
- Sequence
- Duration
- Time and dates
- Key milestones
- Review dates
- Monitoring and review process

Aspects for consideration:
- Nature of the information e.g. qualitative and quantitative or both, validity and reliability
- Statistical analysis; accessing relevant information
- Control of variables
- Resource

2. Be able to implement the research project within agreed procedures and to specification

Implementation
- According to plan (consideration given to modifying plan in the light of monitoring information)
- Adhering to the scope of the research
- Retaining focus on the intended purposes and outcomes of the research
- Monitoring the project including paying attention to resource and time allocation

Data collection:
- Application and implementation of the stated methods from the plan; systematic recording of data and information
- Taking account of bias, validity and reliability of information and control of variables
- Consideration of the sufficiency of the data and information collected.

Data analysis:
- Qualitative and quantitative;
- Identifying trends
- Using software and statistical tables
- Comparison of variables
- Forecasting and extrapolation
- Graphical interpretation

3. Be able to evaluate the research outcomes

Evaluation of outcomes:
- Consider the research question and specification in the light of data analysed;
- Review the successes and difficulties encountered in the project for example delivering the purposes and outcomes of the project, effectiveness of the planning, the methods used, the volume, validity and usefulness of the data; reaching conclusions.

Recommendations and future consideration:
- Significance and implications of the conclusions reached; application of the findings
- Limitations of and improvements to the research
- Developing recommendations including possible areas for future research or the processes used for conducting the research

4. Be able to present the research outcomes

- Format and media: consideration of possible formats linked to the target audience; professional delivery of research
- Use of appropriate media

5.5 Managing communication

Unit aims	This unit aims to develop knowledge and understanding of how communication takes place within and between organisations, the potential pitfalls and the benefits of good practice. Using this knowledge, the learners will carry out a review of communication within an organisation
Unit level	5
Unit code	D/503/7074
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand how information and knowledge is communicated within an organisation	1.1 Analyse key information and knowledge requirements for a range of stakeholders within different organisations 1.2 Explain the systems used for communicating key information and knowledge to stakeholders 1.3 Analyse potential barriers to effective workplace communication
2. Understand factors that impact on workplace communication	2.1 Evaluate how communication is influenced by values and cultural factors 2.2 Explain how technology can be used to benefit as well as hinder the communication process 2.3 Explain how policies and procedures can impact on the communication processes
3. Be able to promote effective interpersonal communication	3.1 Evaluate the effectiveness of own communication skills 3.2 Apply theories of interpersonal communication to oneself 3.3 Request feedback from others on own interpersonal communication skills 3.4 Plan own personal development to improve own communication skills, based on feedback from others
4. Be able to review communication within an organisation	4.1 Carry out a communications audit 4.2 Apply theories of organisational communication 4.3 Create a plan to improve workplace communications 4.4 Identify measures to evaluate the success of the plan to improve workplace communications

Indicative Content

1. Key information and knowledge requirements

- Company performance eg financial data, sales figures, regional differences
- Staff information eg numbers, salaries, appraisal information, training and CPD needs
- Product knowledge eg components, how produced
- How to carry out roles, professional knowledge, sources of 'know-how'
- Stakeholders eg shareholders, board members, directors, senior managers, operatives

Communication systems
- Meetings, briefings (whole staff, departmental, individual)
- Presentations
- Email
- Newsletters
- email
- Interviews, appraisals
- Literature eg manuals, booklets, notices
- Training sessions
- Letters

Potential barriers
- Verbal communication – tone, clarity, active listening and focusing
- Clarity of written message – readability, language, tone
- Technology – poor connections, inappropriate use
- Interpersonal relationships – personal conflict
- Non-verbal communication – body language
- Equality and diversity, pre-judgements, assumptions

2. Values and cultural factors

- Language
- Customs
- 'Saving face'

Use of technology

Help
- To reinforce spoken message, to remind, to ensure written record
- To provide additional/visual information eg graphs, presentation software/slides
- Speed and efficiency

Hinder
- Inappropriate/overuse of email
- 'death by PowerPoint'
- Overreliance eg instead of face to face, in event of technology failure

Policies and procedures
- Legislation
- Charters
- Codes of practice

3. Effectiveness of own communication skills

- Ability to contribute to meetings
- Use of body language
- Written communication skills
- Use of ICT

Theories of interpersonal communication
- Attribution theory, expectancy value model, uncertainty reduction model, social network theory

Feedback from others
- Written, oral
- Formal, informal

Plan own person development
- SMART Targets
- Oral, written, electronic communication
- At meetings, presentations, etc.
- Formal and informal
- Feedback from colleagues and managers

4. Communications audit

- Communications systems and processes
- Policies and procedures

Theories of organisational communication
- Eg Attraction –selection-attrition framework, contingency theories, groupthink, social network theory

Improve workplace communications
- Plan – carry out analysis and act on the results
- Consensus
- Survey
- Training
- Feedback

Measures to evaluate
- Improved performance eg sales figures
- Increased staff retention eg staff turnover
- Increased motivation eg productivity

5.3 People Management

Unit aims	In this unit learners develop the knowledge and understanding of what motivates individuals and teams and be able to use this to review people management strategies used in organisations. Leaners will gain an understanding of leadership theories, motivational theories, the impact of structure and culture as well as other tools that can be used to empower people in the workplace
Unit level	5
Unit code	Y/503/7073
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand how structure and culture impact on people in organisations	1.1 Explain how organisational structure impacts on people in organisations 1.2 Analyse how organisational culture impacts on people in organisations
2. Understand approaches to managing the differences between individuals that impact on their performance at work	2.1 Explain how personal differences impact on individuals' behaviours at work 2.2 Analyse the management styles needed to deal with differences in behaviours
3. Understand the organisational factors that impact on people performance	3.1 Analyse the effect of leadership styles on individuals and teams 3.2 Explain the benefits of flexible working practices to individuals and organisations 3.3 using motivational theories, assess how the working environment impacts on people performance 3.4 Assess how an organisation's ethical practices impact on motivation levels 3.5 Evaluate how organisations use their corporate social responsibility agenda to motivate employees
4. Understand methods for developing human resources	4.1 Explain how motivation theories can be applied to developing people in organisations 4.2 Explain the different uses of coaching and mentoring in organisations 4.3 Analyse the benefits of training and development to individuals and organisations
5. Be able to review how people are managed within organisations	5.1 Review people management strategies used in an organisation 5.2 Assess the impact on people of management strategies used in organisations 5.2 Recommend strategies to promote high levels of performance

Indicative Content

1. Understand how structure and culture impact on people in organisations

Structure
- Hierarchical
- Flat/tall
- Matrix
- Inverted triangle
- Functional
- Product, market and geographical structures

Culture
- 'the way we do things'
- Assumptions
- Behaviours
- Values
- Codes
- Stories, myths
- Ceremonies and rituals
- Working practices

Impacts
- Power/influence of individuals
- Power/influence of teams
- Leadership power/influence (span of control)
- Communication channels, ease of communication
- Motivation levels
- Creativity
- Confused reporting lines

2. Understand approaches to managing the differences between individuals that impact on their performance at work

Differences in
- knowledge, skills and experience
- Attitude
- Personality
- Attitude
- Perception
- Opinion
- Culture
- Religion and beliefs

Management styles to suit different behaviours
- Theory x and theory Y
- Self-fulfilling prophecy
- The Hawthorne studies

3. Understand the organisational factors that impact on people performance

Leadership styles and theories
- Trait theories
- Behavioural approach
- Contingency approach
- autocratic/democratic/laissez faire
- Hersey and Blanchard Situational theory
- Charismatic leadership
- Tannenbaum and Schmidt

Effect of leadership styles on
- Motivation
- Creativity
- Flexibility
- Credibility
- Trust and respect
- Productivity
- Commitment

Benefits of flexible working practices
.. to employees
- Levels of autonomy, empowerment, trust
- Productivity
- Quality of life

.. to organisations
- Motivational
- Productivity
- Need for facilities and systems

Motivational theories
- Hawthorne studies
- Maslow - hierarchy of needs
- Herzberg - hygiene factors and motivators
- Reiss Theory

Ethical practices
- Scrutiny of suppliers
- Distribution techniques
- Customer relationship management
- Selling practices
- Staff development

Corporate Social Responsibility (CSR) Agenda
- Developing the workforce
- Supporting the community
- Providing work experience placements
- Mentoring and coaching
- Supporting career progression, providing opportunites

- Environmental policy
- Employment practices e.g. disability

4. Understand methods for developing human resources

Developing people
- Empowerment, self-actualisation, theory x

Uses of coaching and mentoring
- Talent pools
- Developing skill and confidence
- Poor performance, disciplinary issues
- Re-engaging in the workforce

Benefits of training and development
Individuals
- Self-actualisation, developing potential
- Increased motivation
- Developing talent
- Promotion
- Enhanced pay

Organisations
- Increased productivity
- Workforce retention
- Enhanced profit
- Legal compliance

5. Be able to review how people are managed within organisations

People management strategies
- Working environment
- Leadership style
- Structure
- Culture
- Staff development opportunities
- Flexible working practices
- Ethical practices
- CSR agenda

Impacts on:
- Individuals,
- Teams
- Performance
- Staff retention
- Employee satisfaction

Strategies for promotion of performance
- Incentives, bonus schemes, incremental rises, improved job satisfaction

- For organisational improvement
- For organisational productivity
- For self-improvement

4.21 The Management of Visitor Attractions

Unit aims	The aim of this unit is to develop learners understanding of visitor attractions, their appeal and their impacts. Using this understanding, learners will be able to consider the management strategies appropriate to manage visitors and minimise impacts on the environment.
Unit level	4
Unit code	A/503/8149
GLH	60
Credit value	15
Unit Grading Structure	Pass
Assessment Guidance	Assignment according to awarding organisation guidance.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand the key features of visitor attractions	1.1 Differentiate between different types of visitor attractions 1.2 Analyse the ownership and key objectives of different types of visitor attractions 1.2 Describe the role of agencies and organisations involved in different types of visitor attractions
2. Understand the appeal of visitor attractions to different visitor types	2.1 Analyse how the needs of different visitor types are met at visitor attractions 2.2 Apply motivational theories to analyse the appeal of different visitor attractions
3. Understand the impacts of visitor attractions	3.1 Analyse the economic impacts of visitor attractions 3.2 Analyse the impacts of visitor attraction on the environment and local communities
4. Understand the management strategies used at visitor attractions	4.1 Assess management strategies used at visitor attractions 4.2 Analyse the management strategies used at visitor attractions to enhance sustainability

Indicative Content

1. Understand the key features of visitor attractions

Types of visitor attractions
- Natural: including

  - National parks
  - Wildlife
  - Viewpoints
  - Landscapes eg mountain ranges, deserts, wetlands
  - Outstanding natural phenomena eg Grand Canyon, Victoria Falls, Great Barrier Reef,

- Artificial, manmade or purpose built:

  - Cultural resources (ancient and modern culture)
  - Religious sites,
  - Museums
  - Art galleries
  - Architecture
  - Archaeological sites eg Grimes graves
  - Traditions folklore
  - Festivals
  - Theme parks eg Alton Towers, Eden Project
  - Sports activities eg olympic and paralympic events

Ownership
- public/government owned eg English Heritage and National Gallery
- private eg Australia Zoos and theme parks
- voluntary sector eg National Trust (UK)

Key objectives to include

- Profit
- Conservation
- Preservation, enhancement of local culture and/or heritage
- Revitalisation – attract new business, jobs, revenue, multiplier effect

Agencies and Organisations

- UNESCO – world heritage sites – to protect and preserve heritage
- National Government -- to provide funding for voluntary organisations, designation of protected areas eg National Parks, SSSI; revitalisation of an area (new business, jobs, revenue)
- Local government - to process planning regulations

- Private enterprise/ public limited companies –
- Pressure Groups eg to protection of local environment
- Local community groups - to raise concerns about impacts
- Other tourism organisations eg transport companies, accommodation providers , caterers - to provide associated goods and services

2. Understand the appeal of visitor attractions to different visitor types

Visitor types, to include

- Market segmentation: demographic, geographic, psychographic, socio-economic

- Visitor needs: pleasure and enjoyment, practical (eg restaurants and comfort facilities, access to transport, pushchairs, wheelchairs, etc.) and added value (eg catering for special interest, offering events, activity areas, education facilities) accommodation / transport provision, promotional links eg to supermarket store cards,

Motivational Theories
- Physical
- Emotional
- Cultural
- Status
- Personal
- Personal development

3. Understand the impacts of visitor attractions

Economic Impacts
- To national economies – enhanced appeal of destinations, increased visitor flows, multiplier effect, costs, income
- To local economies – revenue, jobs (seasonality), multiplier effect, attracting other businesses, costs

Environmental Impacts
- exceeding carrying capacity leading to traffic congestion, overcrowding, queues,
- erosion/wear and tear (on buildings, paths, mountain sides)
- pollution: litter, noise

4. Understand the management strategies used at visitor attractions

Visitor Management Strategies

managing supply by
- offering flexible capacity eg extended opening hours, increased staff levels, additional eating and seating capacity

- managing the environment eg by regulated temperatures in historic buildings, darkened rooms to prevent sun damage

managing demand by
- managing visitor flow eg set routes to avoid congestion, timed tickets
- differential pricing strategy, offers to visit off peak times
- targeted marketing

Management strategies to enhance sustainability

- Opening times eg seasonal closure to aid recovery of natural habitats, closure one day a week to reduce wear and tear
- Managing demand eg visitor flows (see above)
- Increasing supply (see above)
- Marketing, price incentives
- Education of visitors eg managing visitor expectations, educating re. their impacts, codes of conducts
- Signage and information eg at attraction, en route to attraction
- Use of technology eg simulated experiences

Inclusion of local community to prevent local conflict eg Masia involved in wildlife preservation

4.20 Passenger Transport Operations

Unit aims	The aim of this unit is to introduce learners to the environment in which passenger transport providers operate. The learners will gain an understanding of those factors that influence passengers' decisions, how passenger transport providers operate to meet passengers' needs and deal with the complex and ever changing external environment. With this understanding the learner will review the effects of recent developments on passenger transport operations.
Unit level	4
Unit code	M/503/8150
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand the influences on passengers' travel decisions	1.1 Analyse the factors that influence passengers' choices of transport 1.2 Analyse how transport operators respond to passengers' choices
2 Understand key aspects of passenger transport operations	2.1 Explain the operational elements of passenger transport systems 2.2 Evaluate the complexities of operating a transport node
3 Understand the external environment in which transport providers operate	3.1 Describe the regulatory framework in which the transport sector operates 3.2 Evaluate the competitive strategies used to maintain and grow market share
4 Be able to review the effects of recent developments on passenger transport operations	4.1 Assess recent developments that have had an impact on passenger transport operations 4.2 Evaluate the impact of terrorist threats on transport operations 4.3 Evaluate the responses to recent developments by different transport operators

Indicative Content

1. Understand the influences on passengers travel decisions

Factors that influence choice
- Appeal – attractiveness, suitability, status, novelty, affordability, image, safety, passenger facilities
- Convenience - accessibility, departure/arrival points, regularity of service, speed, departure/arrival times, ease of booking, time available for travel
- Prior experience, loyalty
- Price, perceived value
- Purpose of trip – business, leisure, or visiting friends and relatives (VFR)
- Quality, classes offered

Response of transport operators
- Targeted marketing
- Pricing policy
- Choice of departure points/services; choices of ticket purchase methods
- Facilities for different traveller types
- Variable process/offers
- Increased/decreased capacity

2. Understand key aspects of passenger transport operations

Operational elements
- passenger requirements eg itineraries, schedules, journey patterns, ticketing requirements, services needed at nodes
- legal and financial aspects - fares, fuels, taxes, licences, health and safety, codes of practice, contracts
- operational plans – staffing levels, service agreements, dealing with rush hour, schedules, capacities, seating
- working with other agencies eg BAA, UKBA

Transport nodes (terminals)
- carrying capacities for inflowing, outgoing traffic/passengers, timings, pressures on facilities caused by late departures/early arrivals, access, passenger controls, peaks and troughs, seasonality, impact of weather, emergency procedures/evacuations
- Terminal facilities for passengers : staff, waiting areas, catering facilities, comfort facilities, queue management equipment (eg ropes, loud halers) support services, surveillance, VIPs, cleanliness, baggage, signs, access routes, check in ticketing management/handling,

Other terminal facilities – parking, surveillance, accommodation, travellers services (eg currency shops), passport control at borders

3. Understand the external environment in which transport providers operate

Regulatory framework
- Regulatory bodies for road, rail, air, sea
- Key regulatory requirements for road, rail, air and sea travellers
- political agenda eg tax, subsidies
- regulatory requirements concerning consumer protection , the environment, diversity and inclusion, health and safety

Competitive strategies
- price eg no frills airlines, advance booking train tickets,
- convenience eg reduced check in times, taxi service to/from airport, regional airports
- additional services eg speedy boarding, VIP lounges, silent carriages/working carriages on trains, meet and greet services, on board entertainment, catering facilities
- quality and image; environmental policies, perceived or actual attitude to customers, community relations,

4. Be able to review the effects of recent developments on passenger transport operations

Recent developments
- environmental pressures and awareness
- diversity of transport
- new markets/destinations
- health issues eg SARS, foot and mouth, deep veined thrombosis
- increased customer expectations – of service, on environmental impacts
- pressure on green belt land
- new services , eg Cross Rail link, Eurostar, new airports/terminals
- economic pressures

Responses
- development of new markets
- consolidation
- withdrawal of services
- improved process and procedures
- providing new services for travellers eg onboard wifi, improved communication
- new designs eg for aircraft, rolling stock

Impact of terrorist threats … on
- staffing needs
- security measures
- regular reviews of security procedures
- checks on staff
- queue's/longer check in times
- passenger awareness
- need for information

emergency procedures – with regular reviews and enactments

5.12 Sustainable Tourism Development

Unit aims	The aim of this unit is to develop knowledge and understanding of the need for sustainable tourism and the role of the planning process to ensure future developments are sustainable for the host communities and their environments. Learners will gain knowledge and understanding of best practice. They will use their knowledge to review the sustainability of a destination and make recommendations to preserve its environmental and social fabric.
Unit level	5
Unit code	T/503/8151
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcome. The Learner will	Assessment Criteria. The learner can
1. Understand the planning process in relation to tourism development	1.1 Assess the objectives of planning for tourism development 1.2 Explain the roles of different stakeholders, agencies and organisations involved in the planning process 1.3 Evaluate the different approaches to planning 1.4 Evaluate the tools used to inform the planning process
2. Understand the need for the sustainable development of tourist destinations	2.1 Justify the concept of sustainable tourism development 2.2 Analyse the impacts of tourism on destinations 2.3 Explain why business decisions can create conflict with local people
3. Understand best practice in terms of sustainable development	3.1 Evaluate how negative environmental impacts can be minimised 3.2 Evaluate how negative socio cultural impacts can be minimised 3.3 Evaluate how positive economic impacts can be maximised 3.4 Evaluate how ethical practices can benefit business and customers
4. Be able to review the sustainability of destinations	4.1 Present viewpoints of those involved in destination developments, including host communities 4.2 Make recommendations to preserve the environmental and social fabric of a destination 4.3 Justify your recommendations, using examples of best practice

Indicative Content

1. Understand the planning process in relation to tourism development

Objectives

- Maintain/protect/use cultural diversity, cultural heritage,
- Maintain/protect/use eco systems, unique environments, wildlife, landscape
- Maximise economic advantage eg jobs, increased profit, foreign exchange, balance of payments
- improved infrastructure, more facilities for travellers and/or host population
- sustainability, long term gain
- increased income (more visitors/customers),
- image/perception
- co-ordinate development
- Stakeholders
- Travellers/visitors
- Host communities
- Local businesses
- Public and private sector tourism partnerships
- Destination management organisations
- Developers/ international businesses
- Governments
- Travel agencies/companies

Agencies and organisations
- International eg UN
- National eg government and campaign groups
- Regional eg regional government
- Local eg local government
- Organisations that drive ethical tourism eg Tourism Concern, Responsible Tourism
- Travel companies

Approaches
- Environmental economic, social
- International, national, local
- Strategic, short term
- Quantitative, qualitative

Tools
- Environmental Impact Assessment
- Cost benefit analysis
- Cambridge Economic Impact Model

2. Understand the need for the sustainable development of tourist destinations

Concept of sustainable tourism development
- Principles of sustainable tourism development – re-focusing, adapting, monitoring, governance
- Need for sustainable development of tourist destinations
- Maintain a balance between limits and usage
- Environmental promotion
- Social and Corporate responsibility
- Enhanced integrity of local ecosystems
- Triple Bottom line, Corporate Social Responsibility (CSR), ecological footprint, human capital, natural capital
- Reports and recommendations - Bruntland Report (1987), World Travel and Tourism Council

Impacts
- Negative, positive
- Socio- cultural eg tourist host relationships, crime , gambling, changes to sexual attitudes, social change , family values, habitual, educational, commercialisation/destruction of culture, destruction/preservation of heritage
- Economic – increased employment opportunities, Balance Of Payments, multiplier effect, opportunities for local business, foreign exchange; leakages, foreign/multinational ownership, increased income
- Environmental – conservation, preservation destruction; pollution (air noise, environmental) damage to environment/ecology, erosion, natural resources, preservation through National parks, irrigation, Official facts and figures

Business decisions that may cause conflict
- Ownership of developments eg leakages of economic benefits/profits overseas
- Environmental costs to destination eg environmental damage, over use of fragile eco systems, damage to coral
- Socio-cultural cost to destination eg dress, customs, religious taboos, family expectations, sexual norms
- Use of limited resources eg water, land, power
- Location of developments eg on sacred sights,
- Limited accessibility for host population eg to beach, enclave tourism, All-inclusive resorts

Limited opportunity for host population to benefit from developments eg all-inclusive resorts

3. Understand best practice in terms of sustainable development

Measures to minimise negative environmental/sociocultural impacts
- Qualitative measures
- Quantative measures eg tourist tax
- Restricted guided tours eg to mountain gorillas, fragile environments
- Land zones
- Environmental friendly polices eg not washing towels every day in hotels
- Shows/staged authenticity eg of local customs, rituals, dances
- Visa, permits eg Antarctica
- Environmental Impact assessment of all activities eg Antarctica

Maximising economic benefits
- Engaging local communities in decision making – empowerment through engagement
- Economic gain through employment and micro-enterprise development;
- Pro poor tourism approach – maximise linkages between local tourist industry and tourist
- Minimise leakages
- Local sourcing of materials and labour
- National and local government involvement

Benefits of ethical practices to businesses/customers
- Improved Image and perception
- competitive advantage
- niche market
- increased demand
- corporate social responsibility agenda

4. Be able to review the sustainability of destinations

Present viewpoints
- Host communities
- Local tourism industry
- Organisations/Activists supporting sustainable tourism
- Developers
- Planners
- Visitors

Recommendations (with reference to LO3)
- Measures to minimise negative environmental/sociocultural impacts
- Maximising economic benefit

Best practice
- Countries, destinations, governments
- See current Tourism for Tomorrow Award

4.25 Tourist Destinations

Unit aims	To develop an understanding of tourist destinations in the UK and worldwide and knowledge of the cultural, social and physical features of tourist destinations. Also an understanding of the appeal and popularity of tourist destinations and issues that could affect these.
Unit level	4
Unit code	K/601/1748
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assessments in accordance with awarding body guidance.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand the scope of key UK and worldwide tourist destinations	1.1 Analyse main tourist destinations and generators of the world in terms of visitor numbers and income generation 1.2 Analyse statistics to determine tourism destination trends and predict future trend
2. Understand the cultural, social and physical features of tourist destinations	2.1 Analyse cultural, social and physical features of tourist destinations explaining their appeal to tourists 2.2 Compare features of developing and leading tourist destinations
3. Understand how the characteristics of destinations affect their appeal to tourists	3.1 Compare the appeal of current leading tourist destinations with that of currently developing tourist destinations 3.2 Evaluate how characteristics of a tourist destination affect its appeal
4. Understand issues likely to affect the popularity of tourist destinations	4.1 Analyse issues that affect the popularity of tourist destinations 4.2 Discuss the potential for responsible tourism to enhance the host community at worldwide tourist destinations

Indicative Content

1. Understand the scope of key UK and worldwide tourist destinations

Tourist destinations
- Tourism generators (numbers and spend) eg regions, countries cities
- Tourism receivers (numbers and spend)
- International, national, regional generators eg regions, countries, cities
- International, national, regional receivers, eg regions, countries, cities

Trends
- Growing and declining regions and destinations
- Visitor numbers
- Types of visitor
- Accommodation and travel preferences
- Level of tourist spend

2. Understand the cultural, social and physical features of tourist destinations

Features
- Cultural e.g. history, architecture, art and music, food and drink celebrations and festivals,
- Social e.g. markets, sporting events, communities, other events
- Physical e.g. lakes, mountains, coastline, areas of natural beauty, cities, islands

Features of developing and leading tourist destinations
- Stage of product life cycle
- Ease of travel to destination
- Available accommodation
- Attractions - man made and natural
- Tourist infrastructure e.g. tourist information centres
- Leisure facilities and entertainments

3. Understand how the characteristics of destinations affect their appeal to tourists

Appeal
- Developing and leading destinations
- Trends and fashions
- Business and leisure markets
- Costs e.g. cheaper resorts, effects of exchange rates

Characteristics
- Political and governmental issues – form of government etc.
- Economic issues- economic growth, dependency on other countries, economic impact of tourism
- Infrastructure – transport, sanitation etc

- Public attitudes to tourism
- Conservation and sustainability issues

4. Understand issues likely to affect the popularity of tourist destinations

Issues affecting popularity
- Attitudes to sustainability
- Political unrest
- Natural disasters
- Poor infrastructure
- Political attitudes e.g. on conservation, human rights
- Economic stability
- Exchange rates

Responsible tourism
- Low carbon footprint
- Positive impact on population – enhancing affluence of population
- Low impact on existing industries such as farming, mining etc
- Low impact on cultural identity

4.26 Tour Operations Management

Unit aims	To develop an understanding of how tour operators create and sell holidays and the strategic decisions involved in managing tour operations.
Unit level	4
Unit code	T/601/1748
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the tour operators industry within the travel and tourism sector	1.1 Analyse the effects of current and recent trends and developments on the tour operators industry
2. Understand stages involved in creating holidays	2.1 Assess the stages and timescales involved in developing holidays 2.2 Evaluate the suitability of different methods of contracting for different components of the holiday and different types of tour operator 2.3 Calculate the selling price of a holiday from given information
3. Be able to review brochures and methods of distribution used to sell holidays	3.1 Evaluate the planning decisions taken for the design of a selected brochure 3.2 Assess the suitability of alternatives to a traditional brochure for different types of tour operator 3.3 Evaluate the suitability of different methods of distribution used to sell a holiday for different types of tour operator
4. Understand strategic and tactical decision making for tour operators	4.1 evaluate the strategic decisions made by different types of tour operator 4.2 compare the tactical decisions that could be taken by a selected tour operator in different situations

Indicative Content

1. Understand the tour operators industry within the travel and tourism sector

Tour operations industry
- Different types of tour operators: mass market, specialist interest, activity based, domestic operators, direct selling
- Industry statistics and structure – major operators, independent operators, numbers of passengers/customers, market share, products and services, structure of businesses, role of trade bodies
- Relevant legislation eg EU Package Travel Directive definition

Current and recent trends
- Changing market trends – package holidays, bespoke holidays, special interest sector etc.
- Dominance of market by a few operators
- Economic impact, liquidations
- Awareness and concern about environmental impacts
- Impacts of globalisation
- Fair trade issues
- Impact of internet and ecommerce
- Customers booking their own holidays/travel arrangements
- Growth of budget airlines
- Regulation and control

2. Understand stages involved in creating holidays

Stages and timescales
- Market research
- Costs and financing
- Seasonal issues
- Different types of holidays
- Planning and forecasting – timescales, finances, components
- Contracting
- Production of sales materials – webpages, brochures, etc

Contracting
- Air/train transport – chartering, allocations, adhoc
- Accommodation – a 'commitment' contract, allocation, adhoc,
- Issues of currency and exchange rates

Components of the holiday
- Accommodation
- Transport
- Resort services
- Ancillary services

Types of tour operator

- Specialist
- Bespoke
- Mass market/packages

Selling price
- Costs – fixed and variable costs, direct and indirect costs, overheads
- Costing – full absorption, marginal costing, break-even
- Profit margin and mark-up
- Currency issues
- Seasonal pricing
- Looking at competitors
- Load factors

3. Be able to review brochures and methods of distribution used to sell holidays

Brochure design
- Format of traditional brochure – size, paper quality etc
- Copy – target customers, photographs, text,
- Practicalities – design, printing, proofs, timescales, print runs
- Legalities – relating to information and pricing options presented

Alternatives
- Web pages
- Television
- CD/DVD formats

Suitability of alternatives to brochure
- Target market
- Products and services etc.
- Margins
- Timescales
- Costs
- Number of anticipated sales

Distribution
- Travel agencies
- Internet direct selling
- Internet agencies
- Mail direct selling
- Telephone selling

4. Understand strategic and tactical decision making for tour operators

Strategic decisions
- Product choices/target markets
- Volume and price decisions
- Pricing strategies and distribution
- Marketing and branding strategy
- Capital investment decisions
- Organisational structure and culture
- Emergency planning

Tactical decisions
- Response to competition e.g. competition pricing
- Maximising room/seat occupancy etc e.g. using marginal costing
- Staffing decisions
- Marketing methods e.g. special offers, discounts
- Responses to liquidations of competitors
- Relationships with press

5.19 Resort Management

Unit aims	To develop an understanding of the operations of tour operators within resorts.
Unit level	5
Unit code	A/601/1754
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignment according to awarding organisation guidance. Learners should have access to information relating to real resort operations on which to base their analyses.

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1. Understand the function and structure of resort operations	1.1 Analyse the function of the resort operations of tour operators 1.2 Analyse the structure of the resort offices of different types of tour operator
2. Understand the role and impact of quality systems and procedures	2.1 Discuss how effective quality systems and procedures affect legal and conflict situations 2.2 analyse the impact of quality systems and procedures implemented by a specified tour operator on its operations
3. Understand the management issues relating to incidents	3.1 analyse incidents that could affect the operation of a resort 3.2 evaluate the procedures to be implemented by a tour operator to deal with different incidents 3.3 discuss how procedures to be implemented by a tour operator link with guidelines of trade associations and government bodies

Indicative Content

1. Understand the function and structure of resort operations

Functions of resort operations
- Provision of services – understanding service offer
- Customer service - standards
- Legal issues – health and safety, local law, contract law (customer and supplier contracts)
- Financial issues – cost levels, profit margins, budgets
- Human resources – staffing issues in resorts – resort representatives, training issues
- Sourcing and supply of resource based services – local trips, guides, special offers etc.
- Communication with customer, supplier, organisation head office, handling agents

Types of tour operators
- Activity based
- Summer/winter
- Eco-tourism
- Self catering/hotel/camping/boating
- All inclusive
- Age based e.g. 18-30, over 60s

Structures
- Reporting lines
- Job roles and responsibilities
- Numbers of staff, Communication lines
- Office based/hotel based staff
- Working hours

2. Understand the role and impact of quality systems and procedures

Legal and conflict issues
- Consumer protection
- Contractual obligations
- Health and safety issues
- Industry regulations and guidelines (e.g. ABTA)
- Environmental issues
- Local legislation
- Customer complaints
- Conflict with local law and/or custom
- Codes of conduct

Quality systems and procedures
- Risk assessment procedures

- Documentation
- Quality monitoring and control procedures
- Complaints procedures
- Communication to resolve issues
- Reporting of risks and issues
- Ensuring procedures and policies are in line with legislation and regulations

Impact of quality systems
- security
- staff confidence
- early resolution of problems
- customer relations/reputation
- clear lines of communication
- clear emergency procedures
- reduced incidence rates

3. Understand the management issues relating to incidents

Incidents
- Natural disasters or events e.g. flood, avalanche, hurricanes, earthquake, volcano eruption
- Accidents – accommodation fire, transport crashes etc.
- Illness – food poisoning, outbreak of infection
- Political unrest
- Changes in legislation
- Restrictions on movement e.g. due to disease or political issues

Procedures to deal with incidents
- Emergency and contingency plans
- Staff responsibilities
- Liaison with third parties e.g. government officials, police, emergency services, military, embassy staff
- Reporting responsibilities within organisation
- Accounting for all customers in resort
- Ensuring safety of customers in resort
- Dealing with press and social media
- Liaison with embassy
- Lines of communication

Guidelines
- Industry body guidelines eg ABTA, CAA
- Home country government guidelines
- Local government guidelines

5.21 Special Interest Tourism

Unit aims	To develop knowledge of special interest tourism and an understanding of its growth in recent years. To understand the customer base, motivations and issues around special interest tourism.
Unit level	5
Unit code	M/601/1752
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assessments should follow awarding body guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand the nature and development of special interest tourism	1.1 discuss special interest tourism in terms of product differentiation and tourist types 1.2 Assess the contribution of tourism trends, factors and shifts in holiday interests to special interest tourism development
2. Understand how special interest tourism matches customers products and service	2.1 Evaluate how providers can match products and services to different customer types
3. Understand the appeal and motivation of special interest tourism for customers	3.1 Analyse the appeal to customers of special interest tourism features and benefits 3.2 Evaluate how the motivations of tourists are met by special interest tourism locations and features
4. Understand management needs and issues of special interest tourism	4.1 Evaluate the organisational and support logistics involved in the management of special interest tourism trips 4.2 Assess how operators resolve issues that affect special interest tourism

Indicative Content

1. Understand the nature and development of special interest tourism

Nature of special interest tourism

- Definition: tourism around specialist activities
- Product differentiation : by types of activities (artistic/creative, active/sports, health/relaxation, educational, learning a new skill, hobbies based), by cost, by location, by target market
- Tourist types: differentiation by socio economic groups, experience of travel, education, amount of leisure time
- Provision e.g. niche rather than mass market

Development of special interest tourism

- Demand factors: disposable income, ease of finding information/booking, trends and fashions, increased leisure time, social factors eg increased divorce rate, aging populations

Supply factors: globalisation, better transport and infrastructure, competition, availability of destinations, internet selling reaching wider markets for niche products

2. Understand how special interest tourism matches customers, products and service

Products and services
- Activities: special interest tours, outdoor activities, hobbies and interests, educational courses, special events (e.g. Olympics)
- Destinations: urban, rural, home or abroad, coast, mountain etc.
- Packages: all inclusive, bespoke, self catering etc.

Customer types
- Individuals
- Groups
- Families
- Age ranges e.g. elderly, teenage etc.

3. Understand the appeal and motivation of special interest tourism for customers

Features and benefits
- Difference from usual tourism offer
- Can combine destination and interests
- Can offer range of activities for families/groups travelling together
- Opportunity to pursue or learn a skill or take part in an activity

Motivation
- Self-actualisation – reach one's own potential (Maslow's hierarchy of needs)
- Do something different e.g. skiing, watersports, painting

- Learn something new
- To compete
- Meet like minded people
- To do something dangerous/ thrill seeking / challenging
- Travel that meets social concerns e.g. low carbon footprint
- Remote locations

4. Understand management needs and issues of special interest tourism

Management
- Financial issues: cost, profitability, demand, price
- Human resources: selection of tour leaders, resort representatives and/or instructors
- Legal/regulatory: permits, licences, health and safety rules and issues, access and visas
- Provision: infrastructure, price, accommodation, transport, equipment required, working with other countries/organisations
- Marketing: identifying customer needs, ensuring customer satisfaction, co-ordination of contributions from different suppliers
- Management of risk

Issues
- Health and safety
- Security
- Environmental impacts
- Cultural impacts
- Social impacts
- Language differences
- Risk

5.6 Marketing   Principles and Practice

Unit Aims	To develop an understanding of general marketing principles and their application to business
Unit Level	5
Unit code	M/503/7077
GLH	60
Credit Value	15
Unit Grading Structure	Pass
Assessment Guidance	This unit aims to develop an understanding of marketing principles. Learners will then be required to conduct an investigation of a business and analyse its marketing strategy. They will also develop a marketing plan for a specific product or service.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand the role of marketing in business	1.1 explain how marketing can be defined 1.2 explain the contribution of marketing to the achievement of business objectives 1.3 analyse the external factors influencing marketing 1.4 explain the role of marketing in a not for profit business 1.5 explain the elements of the marketing process
2. Understand the principles of marketing	2.1 explain the different elements of the marketing mix 2.2 explain methods of segmenting markets 2.3 evaluate the benefits of segmenting markets 2.4 analyse different methods of researching a market 2.5 explain how current technology impacts on marketing activity
3. Understand the application of the marketing mix in a specific business	3.1 review the market segments for a specific product or business 3.2 analyse how the business positions its products or services 3.3 explain how products are distributed 3.4 analyse the use of pricing strategies 3.5 analyse the promotional strategy used by the business
4.Be able to develop a marketing plan for a specific product or service	4.1 propose strategic aims and objectives for the plan 4.2 determine the target market/s for marketing activity, with justification 4.3 analyse the macro and micro environmental factors influencing the marketing planning 4.4 propose a marketing mix for the product or service 4.5 explain how factors relevant to the implementation of the plan have been considered

Indicative Content

1 Understand the role of marketing in business

Marketing definitions
- Differing definitions by various marketing bodies/associations e.g. CIM

Business objectives
- To introduce a new product
- To enter a new market
- To expand market share
- To increase sales
- To increase profits

Marketing contribution to business objectives
- Building competitive advantage
- Improving customer focus
- Increasing customer satisfaction
- Enhancing reputation
- Improving quality

External factors
- Political, economic, social and technological factors
- Pressure groups, competitors, Porter's competitive forces

Not for profit marketing
- Providing information in order to change attitudes e.g. health campaigns
- Providing information and generating income e.g. charities
- Social marketing e.g. political campaigns

Marketing process
- Marketing audit
- Environmental analysis
- SWOT analysis
- Setting aims and objectives
- Planning
- Constraints
- Options

2. Understand the principles of marketing

Elements of the marketing mix
- Product mix: products and brands, features and benefits, product life cycle, Boston Matrix, product development, positioning,
- Price: cost plus, competitive, psychological, skimming, use of strategies in different markets,
- Promotion: above and below the line promotion, public relations, ethics in promotion, internet promotion, direct marketing, choice of strategy

- Place: types of distribution channel, managing distribution channels, use of Internet in distribution, choosing appropriate distribution channel
- Shift from 4Ps to 7Ps product-service continuum, the extended marketing mix, the soft elements of marketing e.g. people

Methods of segmenting markets
- Demographic
- Socio-economic
- Geographic
- Psychographic
- Benefits of segmentation

Marketing research methods
- Primary, secondary
- Qualitative/quantitative
- Surveys, questionnaires
- Sampling methods
- Interviews, structured, unstructured, focus groups
- Observation
- Experimentation
- Ethnography

Impacts of new technology
- Use of social media, Facebook, Linked in, Twitter
- Viral marketing
- Mobile marketing

3. Understand the application of the marketing mix in a specific business

Market segment description
- Demographic
- Socio-economic
- Geographic
- Psychographic

Positioning and product mix
- Analysis of positioning
- Products and brands offered
- Product life cycle analysis
- Boston Matrix analysis
- product development process
- Porter's competitive forces
- Stakeholder analysis

Methods of distribution
- Analysis of distribution channels
- Management of distribution channels
- How channels reach target market

Pricing strategies
- Analysis of strategies used

Promotional strategies
- Analysis of strategies used

4. Be able to develop a marketing plan for a specific product or service

Aims and objectives
- To introduce a new product feature or service
- To enter a new market
- To expand market share
- To increase sales
- To increase profits
- To enhance reputation

Target markets
- Specific demographic
- Geographic area
- Socio economic group
- Defined psychographic group

Macro environmental analysis
- Use of tools such as PEST

Micro environmental analysis
- Use of tools such as analysis of strengths, weaknesses, opportunities and threats (SWOT)

Proposed marketing mix
- Proposed product development
- Proposed product positioning
- Proposed pricing strategy
- Proposed promotional strategy
- Proposed distribution strategy

Implementation factors
- Barriers to implementation of the plan and their resolution
- Marketing budget
- Monitoring and controlling the marketing plan

5.8 Business Ethics

Unit aims	The aim of the unit it to provide the learner with an introduction to business ethics and how they are used by businesses to plan and manage their business goals, objectives and activities.
Unit level	5
Unit code	M/601/1024
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	N/A

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand different ethical perspectives in business	1.1 Explain the background and development of theoretical ethical approaches 1.2 Compare and contrast absolute and relative ethics 1.3 Explain the ethical issues which can affect the operational activities of a business
2 Understand business objectives from an ethical perspective	2.1 Explain how business objectives are affected by ethical considerations 2.2 Evaluate the implications for a business and its stakeholders to operate ethically
3 Understand ethics in workplace relationships	3.1 Assess the role of the company acting as moral agent 3.2 Analyse the development of mechanisms for achieving employee involvement and empowerment
4 Be able to assess a current ethical issue in a business	4.1 Research a current ethical issue affecting a selected business 4.2 Report on how the business could improve the ethics of their operations whilst meeting objectives and ensuring good employer/employee relationships 4.3 Design a suitable ethical code

Indicative Content

1. Understand different ethical perspectives in business

The history and development of ethics
- Modern ethics: teleological, deontological, utilitarianism and pragmatic ethics
- Applied ethics: How ethical problems are resolved in the context of the business or corporate and individual conduct
- Normative and descriptive business ethics
- Institutions and frameworks: The Society of Ethics, the European Business Ethics Network (EBEN)

Absolute v. relative ethics
- Public morality and ethical codes
- Absolute v. relative
- Contextual ethics

Ethical issue in business operations
- Values in business activities
- Corporate social responsibility
- Trade
- Workplace and human rights
- Environmentalism and sustainability
- Professional conduct and standards
- Individual responsibility and conduct
- Corporate Governance
- Legal and regulatory compliance

Legal and regulatory compliance

2. Understand business objectives from an ethical perspective

Business objectives and ethics
- Business objectives such as shareholder value, profit, meeting customer and employee expectations, increasing market share etc.
- How these objectives are affected by ethical considerations such as compliance, environment, CSR, human rights, sustainability ethical treatment of suppliers, workers, investors and other stakeholders

Implications for business and its stakeholders
- Stakeholders such as employees, customers, owners, suppliers, wider population

- Implications
    - Designing ethical processes and relationships
    - Responding to ethical pressures

- Ethical policy
- Ethics and responsibility reporting
- Reputation
- Ethical trade
- Compliance with legislation and codes of practice.

3. Understand ethics in workplace relationships

The business as moral agent
- Stakeholder/business responsibilities, obligations and duties
- Moral obligations
- Psychological contract
- Transparency and accountability

Mechanisms for employee involvement and empowerment
- Employer/employee relations
- Workers councils, employee ownership e.g. John Lewis, unionisation and employer accountability
- Discrimination and human resource policies e.g. equal opportunities
- Individual ethical rights, behaviours and responsibilities

4. Be able to assess a current ethical issue in a business
Research

- Ethical Issues such as globalization, labour issues, outsourcing, fair trade, sustainability, environmentalism, global warming, energy security, access to resources, e.g. water, timber, bio-fuels, community relations, intellectual property, social networking and personal information

- Report on ways to improve such as whistleblowing policies, contribution to the community, ethics in sales and marketing, ethics in IP

- Design of ethical code including ethical auditing for example supply chain; ethical environmental and social reporting; business processes and design; ethical practices, standards and codes of conduct

5.9 Personal and Professional Development

Unit aims	To develop confidence in the learner to successfully manage their personal and professional skills in order to achieve their career goals
Unit level	5
Unit code	T/601/0943
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignment according to awarding organisation guidance

Learning outcomes. The learner will:	Assessment criteria. The learner can:
1. Understand how self-managed learning can enhance lifelong development	1.1 Evaluate approaches to self-managed learning 1.2 Propose ways in which lifelong learning in personal and professional contexts could be encouraged 1.3 Evaluate the benefits of self-managed learning to the individual and organisation
2. Be able to take responsibility for own personal and professional development	2.1 Evaluate own current skills and competencies against professional standards and organisational objectives 2.2 Identify own development needs and the activities required to meet them 2.3 Identify development opportunities to meet current and future defined needs 2.4 Devise a personal and professional development plan based on identified needs
3. Be able to implement and continually review own personal and professional development plan	3.1 Discuss the processes and activities required to implement the development plan 3.2 Undertake and document development activities as planned 3.3 Reflect critically on own learning against original aims and objectives set in the development plan 3.4 Update the development plan based on feedback and evaluation
4. Be able to demonstrate acquired interpersonal and transferable skills	4.1 Select solutions to work-based problems 4.2 Communicate in a variety of styles and appropriate manner at various levels 4.3 Evaluate and use effective time management strategies

Indicative Content

1. Understand how self-managed learning can enhance lifelong development

Self-managed and lifelong learning
- Approaches to learning continuing professional development e.g. off-site training, on-the-job training, mentoring and coaching, research based learning, team learning, professional networks
- Learning theory - Kolb learning cycle; learning styles analysis
- Managing learning - Identifying and setting learning goals and aims; planning how to achieve these, setting timescales and review points
- Industry learning – specific qualifications, training, apprenticeships etc. required and available for specific job roles and where to find information

How lifelong learning might be encouraged
- Explanation of the benefits, incentives such as promotion, time off work to study, payment of fees
- Organisational culture where learning is valued, encouraged and facilitated
- Availability and ease of access, credit accumulation

Benefits of self-managed learning
- Benefits to self – self-confidence, career progression, personal development- improvement in knowledge, understanding and skill
- Benefits to organisation – delivering business results more effectively and efficiently e.g. skilled employees, meets succession planning needs, satisfied employees, staff retention, attracting new employees

2. Be able to take responsibility for own personal and professional development

Skills auditing
- Personal profile
- Identifying skills and attributes – personal skills, industry and job skills, management and leadership skills etc.
- Matching skills and attributes to industry/current job/desired job role, including identification of skill gaps

Personal development needs and activities required to meet them
- Development needs and opportunities available –training available, learning programmes and activities
- Mentoring, coaching
- Career progression, secondments, job swops

Personal development plan
- Setting aims and objectives for a personal development plan, for example identifying the purposes of the development and the goals
- Setting timescales for achievement, monitoring progress with achieving goals
- Action plans

3. Be able to implement and continually review own personal and professional development plan

Implementing development plans
- Time planning/ planning learning sessions
- Consideration of what forms of training/learning are available and appropriate e.g. short course, distance learning, blended learning, full-time or part-time study
- Organising and undertaking activities
- Availability of funding
- Practical issues – time away from work etc.
- Study skills – note taking, self-assessment

Documenting progress
- Evidence – suitable evidence of formal, informal, on-the-job learning
- Portfolio building: how to build a portfolio; meeting evidence requirements; CVs; transcripts

Reviewing and updating development plans
- Reviewing and evaluating achievements against aims and objectives and timescales
- Reflective learning, reflective diaries
- Obtaining and using feedback
- Evidence of achievements
- Reviewing and amending learning plans
- Building in review datesSetting criteria for measuring achievement – for formal and informal development activities

4. Be able to demonstrate acquired interpersonal and transferable skills

Problem identification and solution selection
- Problem identification e.g. relationships with colleagues, line manager, difficulties with aspects of role, interaction with other departments, time management, conflict resolution
- Problem solving
- Taking time to properly understand the problem and clarifying your thinking
- Decision making
- Initiative and taking control of a problem
- Acting within boundaries of own authority

Communication
- Verbal communication skills – speaking skills, discussion skills, presentation skills
- Non-verbal communication – body language, gestures, expressions etc. Using and reading non-verbal signs
- Written communication skills appropriate to the media used e.g. formal reports, emails
- Effective listening skills
- Negotiation skills
- Working effectively with others – team building, discussions, social skills

Time management
- Prioritising work - distinguishing between urgent and important. Taking account of who asks for the work to be completed
- Taking account of availability of others
- Taking account of resources required

- Setting work objectives
- Meeting objectives - estimating times for tasks, using time effectively including planning when particular activities need to be worked on
- Sharing workloads, delegating tasks

5.7 Employability Skills

Unit Aims	
Unit Level	5
Unit code	A/601/0992
GLH	60
Credit Value	15
Unit Grading Structure	Pass
Assessment Guidance	N/A

Learning Outcomes The learner will:	Assessment Criteria The learner can:
1 Be able to determine own responsibilities and performance	1.1 develop a set of own responsibilities and performance objectives 1.2 evaluate own effectiveness against defined objectives 1.3 make recommendations for improvement 1.4 review how motivational techniques can be used to improve quality of performance
2 Be able to develop interpersonal and transferable skills	2.1 develop solutions to work-based problems 2.1 communicate in a variety of styles and appropriate manner at various levels 2.3 identify effective time-management strategies
3 Understand the dynamics of working with others	3.1 explain the roles people play in a team and how they can work together to achieve shared goals 3.2 analyse team dynamics 3.3 suggest alternative ways to complete tasks and achieve team goals
4 Be able to develop strategies for problem solving	4.1 evaluate tools and methods for developing solutions to problems 4.2 develop an appropriate strategy for resolving a particular problem 4.3 evaluate the potential impact on the business of implementing the strategy

Indicative Content

1 Be able to determine own responsibilities and performance

Own responsibilities and performance objectives
- Personal responsibilities: Direct and indirect positive relationships, internal and external communication, adaptability and flexibility, open to learning and development, communication and interpersonal relationships,
- Professional responsibilities: business ethics, employment legislation, employment rights and responsibilities, problem solving, decision making
- Performance objectives: Career and professional planning (short, medium and long term planning), targets eg for improvement and promotion

Evaluate effectiveness
- Monitoring performance objectives: planning, self-reflection, asking for feedback
- Self-appraisal and staff appraisal: including uses of performance appraisals salary levels and bonus payments, promotion strengths and weaknesses, training needs, organisational criteria/data

Recommendations for improvement
- Recommendations: including leadership and management development, further and continuing training, communication and interpersonal relationships, time management, stress management, ability to prioritise
- Based on self-knowledge and feedback from others: including staff, management

Motivation and performance
- Motivational techniques: including empowering, incentivising, praise, rewarding, promoting, improving facilities (Herzberg's hygiene factors)
- Application of motivational techniques: including team briefing, appraisal, spending money, empowering
- Quality of performance: including increased productivity, self-motivation and job satisfaction

2 Be able to develop interpersonal and transferable skills

Solutions to workplace problems
- Training: refreshing skills and techniques, development training (CPD),
- Team building: improving staff relations and communication
- Use of professional expertise: external contractors, technical, financial, trouble-shooting expertise
- Additional recruitment: staff, management
- Re-organisation: change of staff and management structure
- Problem solving: problem analysis, researching and information gathering of changes and issues in the workplace, acting on the information, generating solutions, choosing a solution

Communicate in a variety of styles and appropriate manner
- Verbal and non-verbal: open and positive, formal and informal, responsive and pro-active
- Body language: awareness and use of body language
- IT and social media: Email, Skype, Facebook, Twitter, Asynchronous methods
- Situations: Meetings eg management, team briefings and meetings, customer/consumer facing
- Appropriate manner: Interpersonal skills including personal effectiveness, working with others, use of initiative, negotiating skills, assertiveness skills, social skills

Time management strategies
- Strategies: Prioritising workload, setting work objectives, making and keeping appointments, working steadily rather than erratically, not procrastinating, making time for learning, reliable estimate of task time, work-life balance, delegation, communication of workload issues to others

3 Understand the dynamics of working with others

Working with others to achieve shared goals
- Roles within a team: Leader, motivator, facilitator, organiser, challenger, co-operator, optimist, pessimist
- Situations: informal and formal settings, team/group purpose,

Team dynamics
- Dynamics: positive, negative, easy going, friendly, challenging, conflicting, supportive, management style (eg authoritative, consultative, laissez faire), impact on team/levels of motivation, levels of dimance

Alternative ways

,Changes to: action planning; monitoring and feedback, coaching skills used, ethics, leadership styles , standards set , motivation techniques used, innovation and innovating styles, responsiveness, styles of communcation reliability, consistency, procedures used selectiion of team members eg specialist roles, skill and style/approach mixes, identification of team/work group roles, stages in team development eg team building, identity, loyalty, commitment to shared beliefs

4 Be able to develop strategies for problem solving

Tools and methods for developing solutions
- Identification of the problem: definition of the problem, analysis and clarification
- Tools and methods: use of evaluative data and documentation, problem solving methods and tools, verbal and non-verbal information gathering, observation, interviews, focus groups,

Strategies for resolving problems
- Strategies: Identification of the problem: definition of the problem, analysis and clarification, solution methodologies, selection of appropriate actions including timescales, stages, resources required, contingencies and risk management, assessment of various alternative outcomes to gain a solution

Potential impact on the business of implementing strategies
- Evaluation: based on critical success factors, measurement of solution against specification and desired outcomes, sustainability of problem solving strategy
- Impact: Success or failure eg changes to production, growth, innovation, employee/employer satisfaction/motivation, changes to processes and procedures

5.14 Business Law

Unit aims	To develop knowledge of some of the main aspects of business law that the learner may encounter as a manager in a business.
Unit level	5
Unit code	R/601/1145
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Learners should show how the law is applied in given business scenarios.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Be able to apply the main principles affecting the legal relationship between business organisations and their consumers	1.1 Apply the legal rules on implied terms relating to the sale of goods and supply of services 1.2 Apply the statutory provisions on the transfer of property and possession 1.3 Evaluate the statutory provisions on buyer's and seller's remedies 1.4 Apply product liability statutory provisions
2. Be able to apply the legal rules on consumer credit agreements and agency	2.1 Differentiate between types of credit agreements 2.2 Apply rules, termination rights and default notices in a given scenario 2.3 Differentiate between the different types of agent 2.4 Evaluate the rights and duties of an agent
3. Understand the legal rules relating to monopolies, mergers and anti-competitive practices	3.1 Outline monopolies and anti-competitive practice legislation in the UK 3.2 Explain the role of the Competition Commission within the context of monopolies and anti- competitive practices and the UK office of fair trading 3.3 Define dominant positions within the EU common market 3.4 Consider the application of EU exemptions to potentially anti-competitive practices
4. Know the key provisions relating to intellectual property rights	4.1 Identify differing forms of intellectual property 4.2 Outline the principles relating to the protection of inventions through patent rights and their infringement in a given business scenario 4.3 Describe the principles relating to copyright protection and their infringement in a given business scenario 4.4 Compare and contrast the protection of trade marks and business names

Indicative Content

1. Be able to apply the main principles affecting the legal relationship between business organisations and their consumers

Sale of goods and Supply of services
- Contractual basis – basic contract law
- Relevant case law
- Relevant legislation e.g. in UK Sale of Good Act 1979
- Implied terms

Transfer of property and possession
- Statutory provisions
- Application of provisions

Remedies for buyer's and seller's
- Remedies available
- When they are applied
- Purpose and intention of remedies

Product liability
- Defective products
- Tort law in relation to defective products
- Relevant case law
- Legislation for protection of consumer e.g. in UK Consumer Protection Act 1987
- Remedies for consumer

2. Be able to apply the legal rules on consumer credit agreements and agency

Types of credit agreements
- Definition of consumer credit, restricted and unrestricted use of credit, relevant legislation
- Types of agreement e.g. with suppliers, with lenders, small agreements, agreements exempt from regulation, linked transactions etc.

Rules, termination rights and default notices
- Relevant case and contract law
- Relevant legislation e.g. in UK Consumer Credit Act 1974
- Consumer credit licensing requirements
- Application of rules re: agreement, management, termination, early repayment, default etc.

Agents and agency
- Definition of agency, agents and principal
- Types of agents
- Authority of agents
- Rights and duties
- Liability

3. Understand the legal rules relating to monopolies, mergers and anti-competitive practices

UK Monopolies and anti-competitive practice legislation
- Legislation on competition and fair practice
- Definition of monopolies
- Examples of restrictive trade

Competition Commission and UK Office of Fair Trading
- Roles and purpose, Director General of Fair Trading
- Limits of authority
- Appeals

Dominant positions in EU
- Treaties
- Impacts of treaty provisions on competition and anti-competitive practice
- Enforcement and/or abuse of dominant positions

Exemptions
- Treaty articles and definitions
- Individual exemptions
- Block exemptions
- Impact of exemptions

4. Know the key provisions relating to intellectual property rights

Intellectual property
- Definition
- Types
- Relevance to business
- Ownership

Patents
- Definition of patent
- Legislation
- Registration in UK, EU and internationally, role of patent offices- UK, EU
- Rights related to patents
- What can and can't be patented
- Invention and ownership including patents and employees

Copyright
- Definition of copyright
- Legislation
- What can and can't be copyrighted
- Production and ownership
- Duration
- Protection under copyright

Trademarks and business names
- Definitions of trademarks and business names
- Registration of trademarks and business names
- Rights to use registered trademarks and business names

4.6 Corporate Social Responsibility

Unit aims	To develop an understanding of CSR issues and impacts of CSR policy.
Unit level	4
Unit code	A/503/7082
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Learners will be required to demonstrate evidence of understanding corporate social responsibility (CSR) issues and the impact of CSR policies on stakeholders of organisations. They will make recommendations for responsible business practice.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand current corporate social responsibility issues facing business	1.1 define corporate social responsibility (CSR) 1.2 describe background and changing attitudes to CSR 1.3 describe the regulatory framework for CSR 1.4 explain environmental issues in CSR 1.5 explain economic and political issues in CSR 1.6 explain social and community issues in CSR
2. Understand the impact of corporate social responsibility policy on different stakeholders	2.1 assess the benefits of CSR to employees 2.2 analyse the impact of CSR on the supply chain 2.4 explain how a CSR policy impacts on business performance 2.5 explain how CSR impacts on marketing strategy 2.6 assess the potential conflicts which may arise between the needs and expectations of different stakeholders
3. Be able to make recommendations for responsible business practice	3.1 review the CSR policy of a specific business 3.2 assess the extent of voluntarism in CSR policy 3.3 recommend changes to CSR policy to benefit different stakeholders 3.4 assess the potential impact of changes in CSR non business performance

Indicative Content

1 Understand current corporate social responsibility issues facing business

Definitions
- Behaving responsibly
- Contributing to a better society
- Integrating social and environmental concerns in business
- The Triple Bottom Line – people, planet and profit

Regulatory frameworks
- ISO 26000 Social responsibility – voluntary guidance
- Environmental protection
- Health and safety legislation
- Human rights legislation
- Compliance with employment legislation

Environmental issues
- Recycling policies
- Sustainability
- Use of packaging
- Logistics of delivery, congestion
- Use of scarce resources
- Pollution
- Carbon footprint

Economic and political issues
- Location of suppliers
- Supporting local business
- Supporting developing countries
- Fair trade
- Non acceptance of global agreements eg Kyoto

Social and community issues
- Employing socially disadvantaged and disabled people
- Sponsorship
- Encouraging education and training
- Volunteering

2. Understand the impact of corporate social responsibility policy on different stakeholders

Benefits to employees
- Improved working conditions
- Lack of discrimination
- Compliance with legislation
- Whistleblowing policy

Impacts on supply chain
- Ethics in production
- Responsible sourcing

- Reduced transport costs
- reduced carbon footprint
- use of technology in supply chain management

Impacts on business performance improved

4.2 Resource Management

Unit aims	The aim of this unit is to provide an overview of the human and physical resources needed in a range of organisations, including those in the primary, service and manufacturing sectors, and provide an understanding of the impact of efficiency on the organisations. Learners will use this knowledge to review the effective use of resources within an organisation.
Unit level	4
Unit code	F/503/7083
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance.

Learning outcomes. The learner will:	Assessment criteria. The learner can:
1 Understand the key features of resource management	1.1 Analyse the differing resource requirements of organisations in different sectors of the economy 1.2 Outline key requirements relevant to resource management in organisations in different sectors of the economy
2 Understand the importance of the effective use of physical resources	2.2 Evaluate how the use of physical resources is monitored and managed 2.1 Evaluate the impact of resource wastage 2.3 Assess the costs of high profile technological failures 2.4 Assess the business case for the use of ethical and sustainable resources
3 Understand how to maximise the effectiveness of human resources	3.1 Assess the need for human resource planning in the workplace 3.2 Using motivational theories, analyse what motivates people 3.3 Evaluate the methods used to monitor and improve employee performance 3.4 Assess the effectiveness of reward systems in different contexts
4 Be able to review the effective use of resources	4.1 Monitor the use of physical resources against performance measures and procedures 4.2 Analyse data on employee performance 4.3 Report on the effective use of human and physical resources 4.4 Make recommendations to improve efficiency

Indicative Content

1. Understand the key features of resource management

Organisations
- Primary e.g. mining,
- Secondary e.g. Manufacturing, electronics, engineering
- Tertiary e.g. service industries e.g. tourism, finance, catering

Resource requirements
- Raw materials
- equipment
- Human resources/know how
- Technology
- Facilities
- Time
- Transport

Requirements
- Compliance with legislation , codes of practice
  - Health and Safety e.g. hazardous substances
  - Environmental e.g disposal, impact on environment,
  - Employment e.g. diversity and inclusion, health and safety at work
- Storage facilities
- Waste/recycling systems
- Specialist training
- Management information systems

2. Understand the importance of the effective use of physical resources

Monitoring and management of physical resources
- Buying and ordering systems
- Schedules
- Preferred suppliers
- Just-in-time management
- Stock control systems

Impact of resource wastage
- Financial costs, reduced profits
- Need for disposal of excess/out of date stock
- Poor image e.g. public outcry at waste
- Goods not delivered/manufactured/supplied
- Loss of customer base
- Delays in production

Technological failures, for example
- NHS computer system
- Fire service control centre system
- MOD procurement system

The business case
- Business profile/image
- Marketing advantage, competitor advantage
- Ethical and sustainable reasons

3. Understand how to maximise the effectiveness of human resources

Motivational theories
- Herzberg
- McGregor
- Maslow
- Expectancy Theory

Human resource planning
- Respond to change – in the organisation, to external factors
- Staff turnover
- Forecasting HR requirements
- Responding to employment trends
- At micro level – to organise staff e.g. terms of employment, staff rota's, holidays

Monitoring and improving employee performance
- Key performance indicators (KPIs)
- Appraisals
- Statistics e.g. sales figures
- Targets
- Customer feedback
- Training – internal and external

Reward systems
- Performance related pay
- Bonuses
- Advancement/promotion
- Status
- Share options

4. Be able to review the effective use of resources

Physical resources performance measures
- Budget restraints
- Statistics e.g. sales figures
- Performance against targets
- Customer feedback, levels of positive and negative feedback/complaints, levels of returns
- Repeat sales
- Targets
- Key performance indicators (KPIs)

Data on employee performance
- Statistics e.g. sales figures
- Performance against targets
- Customer feedback, levels of positive and negative feedback/complaints, levels of returns

- Repeat sales

Report
- Written report or oral report

Recommendations
- Physical resources
- Human resources

4.7 Administrative Services

Unit aims	To develop an understanding of the range of administrative services that might be offered to managers or departments within organisations and to develop administrative skills.
Unit level	4
Unit code	J/503/7084
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Learners will research the range and extent of administrative services and demonstrate administrative skills.

Learning outcomes. The learner will:	Assessment criteria. The learner can:
1. Understand the range and diversity of administrative services	1.1 Explain the different administrative services which may be offered 1.2 Analyse the skills required to be effective in administrative services 1.3 Explain the challenges presented when offering administrative support to more than one manager or department 1.4 Explain the legal requirements relevant to administrative services
2. Be able to develop organisational systems	2.1 Evaluate the different types of filing systems 2.2 Set up and run a filing system 2.3 Set up and use a stock control system 2.4 Use a purchasing system 2.5 Explain the importance of keeping accurate records
3. Be able to support meetings and events	3.1 Plan meetings and events 3.2 Produce documentation for meetings 3.3 Analyse policies and procedures for setting up meetings and events 3.4 Recommend improvements to policies and procedures for setting up meetings and events
4. Understand the importance of effective communication in the workplace	4.1 Evaluate the suitability and effectiveness of different communication systems in the workplace 4.2 Analyse the role of technology in supporting effective communication in the workplace

Indicative Content

1 Understand the range and diversity of administrative services

Administrative services
- Clerical services
- Distributing information
- Supervising junior staff
- Record keeping
- Managing mail
- Diary management
- Supporting meetings/conferences and events
- Payroll
- Reception duties
- Customer service
- Premises management

Skills
- Communication
- Customer service
- IT
- Organisation
- Time management

Challenges
- Managing specific needs of different managers
- Adapting to different management styles
- Planning and prioritising
- Utilising technology to streamline processes

Legal requirements
- Data Protection Act
- Health and Safety at Work Act eg. Display Screen Equipment Regulations
- Employment legislation

2. Be able to develop   organisational systems

Filing systems
- Electronic /cloud
- Alphabetic
- Geographic
- Numeric
- Chronological
- Subject

Stock control
- Bar coding
- Radio frequency identification

- Just in time
- First in first out

Purchasing
- Budget control
- Auditing
- Client relationship

Record keeping
- Sales ledger
- Purchase ledger
- Financial records
- Meeting notes
- Email records

3. Be able to support meetings and events

Meeting and event planning
- Physical or virtual venue
- Bookings
- Catering
- Timings
- Planning to budget
- Promotion/invitation
- Attendees
-
Meeting documentation
- Agenda
- Minutes
- Distribution lists
- Papers for the meeting

Analysis of policies and procedures for meetings and events
- Type of system
- Ease of use
- Budget versus cost
- Accessibility
- Fitness for purpose
- Reporting lines

4. Understand the importance of effective communication in the workplace

Different communication systems
- Meetings: eg team, department, whole organisation
- Meetings schedule
- Telephone
- Email
- Conferences
- Informal

Role of technology in supporting communication
- Internet
- Intranet
- Virtual meetings/conferences
- Strengths and weaknesses of different technologies

4.8 Planning a Work Based Team Project

Unit aims	To develop project management skills in the workplace.
Unit level	4
Unit code	K/503/7076
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Learners will be required to develop a proposal for a work based team project, plan the project, implement the plan and evaluate the project.

Learning outcomes. The learner will:	Assessment criteria. The learner can:
1. Be able to develop a proposal for a work based team project	1.1 Identify the aims and objectives of the project 1.2 Propose roles and responsibilities of team members 1.3 Identify constraints on the project 1.4 Propose ways of monitoring and evaluating the project
2. Be able to plan the work based team project	2.1 Plan the physical, financial and human resources needed for the project 2.2 Carry out a risk assessment for the project 2.3 Produce interim and completion timescales for the project
3. Be able to implement the plan for a work based team project	3.1 Carry out the plan according to assigned role and responsibility 3.2 Log activities carried out during the project 3.3 Log problems and solutions encountered during the project
4. Be able to present the results of the work based team project	4.1 Analyse data from the project 4.2 Apply findings from the project 4.3 Use a range of communication skills to present results
5. Be able to evaluate the project against the stated objectives	5.1 Evaluate their own performance 5.2 Evaluate the team's performance 5.3 Make recommendations for improvement for future projects

Indicative Content

1 Be able to develop a proposal for a work based team project

Aims and objectives
- Educational
- Organisational
- Personal development
- Team building
- Specific, measurable, achievable, realistic and timed (SMART)

Roles and responsibilities
- Project management
- Finance
- Legal/regulatory
- Task management
- Reporting

Constraints
- Financial
- Time
- Legal
- Risk
- Physical/resource based

Ways of monitoring the project
- Meetings
- Reporting
- Data analysis
- Interim appraisals

Ways of evaluating the project
- Success criteria
- Self evaluation
- Peer evaluation
- Tutor evaluation

2. Be able to plan the work based team project
Physical resources
- Centre for project management
- Documentation
- IT facilities
- Telephone

Financial resources
- Budget
- Sources of funding
- Contingency

Human resources
- allocation of team members' roles
- job descriptions
- external expertise

Risk assessment
- identification of risks
- likelihood of risk
- severity of risk
- contingencies

Time management tools
- critical path analysis
- Gantt charts
- PERT analysis
- Prince

3. Be able to implement the plan for a work based team project

Roles and responsibilities
- Individual assigned tasks
- Support for other team members

Activity log
- Record of tasks and actions during implementation of the project
- Record of problems encountered and actions to resolve

4. Be able to present the results of the work based team project

Data analysis
- Data researched relevant to project
- Sales data
- Production data
- Customer profile data

Application of findings
- Relevance to aims and objectives
- Conclusions
- Supported recommendations

Communication skills
- Oral presentation skills
- Reporting formats
- IT skills
- Use of appropriate media

5. Be able to evaluate the project against the stated objectives

Evaluation methods
- Self assessment
- Peer assessment
- Evaluation based on teacher assessment

Recommendations
- Ways of working as a team
- Personal performance for the organisation

4.10 Planning a New Business Venture

Unit aims	The aim of the unit is to develop business planning skills. These skills can be applied to either a small micro enterprise or a new venture within an existing company. To use these skills effectively learners will need to develop an understanding of business types and those factors that determine the success or otherwise of any new venture, including research of the market, how to develop the business case and how to pitch it
Unit level	4
Unit code	R/503/7072
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Assignments in accordance with awarding organisation guidance

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1. Understand the different types of business organisations	1.1 Analyse the potential benefits, limitations and risks associated with different types of business organisations 1.2 Analyse sources of finance for different types of business organisations 1.3 Evaluate the legal considerations relevant to planning a business venture
2. Understand factors that determine market potential	2.1 Analyse market conditions that impact on setting up a new business venture 2.2 Analyse gaps in the market for potential products 2.3 Analyse target markets for a business venture
3. Be able to develop a business case	3.1 develop the mission, vision, aims and objectives of the business 3.2 Interpret external factors to justify need for your business product 3.3 Specify the business product to meet needs 3.3 Propose business structures and systems that will deliver business aims and objectives 3.4 Produce business planning forecasts based on targets 3.5 Identify business responses if targets not met
4. Be able to pitch a business proposal	4.1 Pitch for funding for a business proposal 4.2 Present documentation to support your pitch

Indicative Content

1. Understand the different types of business organisations

Business types eg sole trader, partnerships, companies – unlimited and limited, PLC
- Potential benefits – ownership, control, managing risk
- Potential limitations – growth, image, operations, finance
- Potential risks – unlimited liability, loss of control eg to shareholders, closure, bankruptcy/insolvency

Types of business organisations
- Sole trader - Personal finance, savings, profit
- Partnership – profits,
- Unlimited company - Personal finance, savings, profit
- Limited company – profits, share, floating
- PLC – shares, reissues

Sources of finance
- Savings, loans, profit, share capital, floatation, private equity

Legal considerations
- Health and safety
- Environmental
- Employment and redundancy
- Contract
- Insurance

2. Understand factors that determine market potential

Market conditions
- PEST (Political,Economic, Social/Ethical, Technical)
- Competitor analysis eg characteristics and strategies of the competition
- Estimating the market size

Gaps
- For the new products or services
- Emerging trends eg due to aging population, as a result of new technology
- Changing requirements

Target markets
- Socioeconomic
- Age
- Gender
- Occupation
- Sources of finance
- Special factors
- Personality indicators
- Geographical

3. Be able to develop a business case

Develop vision/aims and objectives (in relation to….)
- Market conditions
- Target market
- Market gaps

External factors
- PEST (political, economic, social, technological)
- Gap analysis
- Market conditions

Specify
- The product eg details, dimensions, purpose, longevity, target market, international or national market, pricing, distribution and marketing

Business structures and systems
- Organisational structure
- Resource management systems
- Communication and customer service
- Technology requirements/systems

Forecasts
- Financial forecasts
- Physical forecasts
- Sales forecasts
- Short and longer term

Business responses
- Use of contingency funds
- Closure
- Insolvency and bankruptcy
- New markets
- More funding

4. Be able to pitch a business proposal

Pitch
- Present persuasive case
- Provide supporting documentation

Present documentation
- Vision and aims
- Needs and target market
- Business systems
- Forecasts

4.11 Customer Relationship Management

Unit aims	To develop an understanding of the scope and importance of CRM and to explore how effective CRM is achieved.
Unit level	4
Unit code	T/503/7081
GLH	60
Credit value	15
Unit grading structure	Pass
Assessment guidance	Learners will be required to carry out research into customer relationship management (CRM and will plan improvements to CRM in a specific organisation.

Learning Outcomes. The learner will:	Assessment Criteria. The learner can:
1 Understand the importance of customer relationship management to business	1.1 explain the key aspects of customer relationship management 1.2 analyse the benefits of good customer relationship management 1.3 analyse the impact of quality management systems on customer relationship management
2. Understand how good customer relationship management is achieved	2.1 explain the processes necessary for achieving effective customer relationship management 2.2 explain the role of internal staff in achieving effective customer relations 2.3 assess the role of external stakeholders in achieving effective customer relations
3. Understand the use of loyalty schemes in customer relationship management	3.1 analyse the use of loyalty schemes to gain information about customers 3.2 explain how the information gained is used to inform marketing and customer service policy
4.Be able to plan improvements to customer relationship management	4.1 review customer relationship management in an organisation 4.2 propose improvements to processes for customer relationship management 4.3 propose improvements to the role of staff in promoting good customer relationships 4.4 produce a plan for the implementation of improvements

Indicative Content

1 Understand the importance of customer relationship management to business

Aspects
- Definition eg strategies to learn more about customers and improve relationships with them
- Collecting customer information
- Systems to store customer information
- Access to information for appropriate personnel
- Analysis of customer behaviour
- Use of data to inform marketing, customer service and quality systems

Benefits
- Increased profits
- Competitive advantage
- Increased sales due to better understanding of customer requirements
- Effective marketing targeted at known customer profiles
- Personalised approach to customers
- Increased customer satisfaction
- Increased customer retention

Quality Management
- Total quality management
- ISO standards
- Balanced Scorecard

2. Understand how good customer relationship management is achieved

Processes
- Creating a customer culture
- Collecting and processing customer information
- Making systems customer based
- Supporting with effective IT
- Complaints procedures

Internal staff
- Senior management
- IT managers
- Operational managers
- Front line
- Administration

Roles
- Determination of aims and objectives of CRM
- Choice of system
- Implementation and management of system
- Liaison with software suppliers
- Analysis and use of data
- Implementing customer service policies and processes
- Understanding of customer service as a key responsibility

- Role model
- Training

External stakeholders
- Shareholders
- Suppliers
- Community groups
- Customers

Roles
- Agreeing strategies
- Reporting
- Sharing information
- Complying with customer service policies
- Acting in partnership
- Giving feedback

3. Understand the use of loyalty schemes in customer relationship management

Information from loyalty schemes
- Purchasing habits
- Opinions
- Preferences
- Profiles of customers

Use of information
- Targeting groups of customers
- Product development to meet customer needs
- Adapting marketing mix
- Personalising marketing
- Choice of media for promotion

4. Be able to plan improvements to customer relationship management

Review
- Systems in use
- Current role of staff
- Service policies in use
- Quality benchmarks used
- Quality of customer service
- Available data on customer satisfaction

Potential improvements to processes
- New software systems
- Customer service policies
- Working towards recognised quality standards
- Introduction of mystery shoppers
- Introduction of a CSR department

Potential improvements to the role of staff
- Recruitment of right staff
- Training
- Clear vision and mission
- Appropriate access to customer data