

Unit 27: Organising a Travel and Tourism Study Visit

Unit code: M/600/8477

QCF Level 2: BTEC First

Credit value: 5

Guided learning hours: 30

● Aim and purpose

This unit helps learners to understand the risk assessment process for study visits, and to facilitate participation in a study visit. This will give learners first-hand experience of aspects of the travel and tourism industry, as well as opportunities to gain planning skills and to review and evaluate the visit.

● Unit introduction

This is a level 2 unit from the BTEC Firsts in Travel and Tourism suite.

To achieve this unit learners must be involved in the planning processes and must participate in a study visit. It is expected that the study visit will be a day trip undertaken without the need for an overnight stay but the unit can be based on a residential study visit either within the UK or overseas if this is already incorporated into the programme. The study visit presents learners with the opportunity to learn about travel and tourism outside the classroom in a real-life situation. Learners can experience the subject first hand and build on knowledge gained during delivery of other units. If the study visit is a residential, it can promote teambuilding and independent living. For some learners, this may be their first experience of travelling without their family or close friends.

Learners are required to establish the aims and objectives for the study visit, considering the purpose of the study programme, possible research, personal development and planned outcomes. Learners will deliver a proposal for an effective study visit, taking into account the considerations and constraints.

Health, safety and security are critical to the success of all educational study visits and learners will be introduced to the reasons for, and the importance of, risk assessments. Learners will then have the opportunity to discuss a full risk assessment for the study visit.

Learners must also participate positively in the study visit, projecting the correct attitude and image, showing consideration towards others and exhibiting responsible behaviour. There will be opportunities for learners to gather information about aspects of the travel and tourism sector and to evaluate the success of the visit in terms of information gathered, knowledge gained and their own contribution.

● Learning outcomes

On completion of this unit a learner should:

- 1 Be able to develop a proposal for a travel and tourism study visit
- 2 Understand the process of risk assessment
- 3 Be able to contribute to a successful travel and tourism study visit
- 4 Be able to review and evaluate the success of the study visit.

Unit content

1 Be able to develop a proposal for a travel and tourism study visit

Aims and objectives: educational eg links to the curriculum, relevance to study programme, opportunities for research; personal development eg independence, increased responsibility for self and others; interaction with others; outcome eg coursework, experience

Proposal: to meet set aims and objectives; destination; means and range of transport available; arrival and departure points; distances; costs; times; curriculum opportunities; itinerary; taking account of considerations and constraints; features and benefits of the proposal

Considerations: eg types of study visit, duration, comparison of potential destinations, distance travelled, means of transport, weather conditions, health, safety and security, opportunities for learning, educational visits or talks

Constraints: financial eg budget, costs, personal expenditure; legal and risk eg personal safety, equipment used, drinking of alcohol, duty of care

2 Understand the process of risk assessment

Reasons for risk assessment: legal requirement; identification of and reduction of risks; safety of participants; allocation of roles and responsibilities

Process of risk assessment: identification of possible hazards (relating to travel to, from and within destination, method of transport, venue, activities, free time); level of risk of hazard; action taken to reduce risk of hazards (code of conduct, written and verbal advice, use of reputable organisations, eg coach companies); student-staff ratios

3 Be able to contribute to a successful travel and tourism study visit

Participation in the planning of the visit: devising a group code of conduct; allocated roles; producing study visit information eg the venue; producing itineraries; finance and administration eg make bookings, collect money and documentation

Responsibilities prior to the visit: providing the necessary personal documentation, eg consents, passports, visas, medical information, emergency contact details; providing visit information eg clothing, weather, food and drink

Participation during the visit: responsibilities to self, eg personal health, safety and security; time management; responsibility and consideration to others, eg peer group, tutors, other guests, fellow passengers, coach driver, speakers; attitude; health, safety and security of peers; adherence to code of conduct; awareness of the needs of others eg cultural awareness

4 Be able to review and evaluate the success of the study visit

Success criteria: suitability of destination (for age group, learning opportunities); travel (to, from, within the destination); timings; venues; budget; personal expenditure; meeting aims and objectives; other eg accommodation, duration, appropriateness of speakers

Evaluation: personal, peer and tutor evaluations; personal strengths and weaknesses; areas for improvement; evaluation methods used eg own observations, interviews with participants (tutors and peers), questionnaires

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
P1 Propose a study visit, stating aims and objectives and taking into account constraints and considerations [CT 1]	M1 Explain how the proposed study visit will meet the aims and objectives, taking into account constraints and considerations	D1 Evaluate the success of the study visit in meeting the aims and objectives, using analysis of the feedback and making recommendations for future visits
P2 Discuss the reasons for and the process of risk assessment, identifying potential hazards and risks for the proposed study visit	M2 Explain how hazards and risks identified will be minimised	
P3 Make a positive contribution during planning, prior to and whilst on the study visit [TW 1]	M3 Analyse own contribution and the results of the feedback to judge the success of the visit	
P4 select and prepare different methods of gathering feedback to evaluate the success of the study visit		

PLTS: This summary references where applicable, in the square brackets, the elements of the personal, learning and thinking skills applicable in the pass criteria. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

Key	IE – independent enquirers	RL – reflective learners	SM – self-managers
	CT – creative thinkers	TW – team workers	EP – effective participators

Essential guidance for tutors

Delivery

The study visit can be delivered during any part of the programme. The unit is intended to be based on a one-day study visit without the need for overnight accommodation. However, if a residential visit has already been planned then this can be the basis for the unit. In this case, tutors must take into account the fact that it may be the learner's first residential experience without their family and, as such, additional support and guidance may be required, both before and during the visit and in conjunction with parents/guardians.

The safety of learners is paramount and study visits must be undertaken within the requirements of educational policies and legal regulations regarding the safety of learners. If learners are working independently, a structure must be in place to ensure their personal safety and security. Detailed advance planning is essential to the success of the visit. If the visit is an overseas residential, advice should be sought, where necessary, in respect of current obligations under the terms of the EU Package Travel Regulations.

Visits to tourism providers and guest speakers during the visit will provide vocational and academic relevance and could enable learners to experience first hand the scope of products and services provided at the venue. It is recommended that the relevant organisations are contacted before the visit with a view to providing speakers on site and information about the venue. In the lead up to the visit, a variety of resources could be used to add detail and background to the venue and the destination and to generate discussion.

It is important that learners understand the need for careful planning of a study visit and this starts with setting aims and objectives. The tutor could initiate a class discussion on the reasons why study visits take place and why they are an important part of the course. The tutor should ensure that all learners understand the difference between an aim and an objective (an aim states what one wants to achieve and an objective states how it will be achieved). Aims and objectives should be discussed as a group but should be presented individually with the learner's own explanation.

Proposing a possible study visit should involve learners in interesting research. A tutor-led group discussion on constraints and considerations would be a useful starting point. The group could then draw up a list of possible constraints and considerations. The proposal for a suitable study visit could form the basis of small-group work, with delivery being in the form of a verbal presentation supported by visual aids. The proposal does not have to be for the actual visit itself as the destination and venue may already have been decided and the itinerary planned by the tutor.

Health, safety and security are critical to successful educational visits, as they are to all tourism operations. Learners need to be made aware of the importance of health, safety and security to the traveller and why risk assessments must be completed for educational visits.

This unit gives learners the opportunity to understand why risk assessments must be completed and what should be included. Learners should have the opportunity to examine and discuss risk assessments and identify possible hazards on the visit. The risk assessments could be those previously completed by the centre or by the centre's local authority. Alternatively, learners could access risk assessments from the HSE website. Learners could be divided into groups and each group given an element of the study visit to risk assess, eg the journey, the venue, activities, free time. Learners could identify the possible hazards and report their findings to the rest of the group. This could lead to a whole-group discussion on the most appropriate means of reducing the risks.

It is important that learners contribute to the success of the study visit, both by participating positively in the planning stages and by behaving in an appropriate manner during the visit. Much of the planning may need to be carried out by the tutor but learners should be encouraged to participate. An ideal way to do this would be to involve learners in compiling a booklet to be distributed to all participants. The booklet could include information on various aspects of the visit, such as the route to be taken, attractions, history, where to buy souvenirs, where to eat, customs and culture – all dependent on whether the visit is a day trip, a UK residential or an overseas residential. Learners could randomly be allocated a topic to research. The tutor could provide guidance as to reference sources such as tourist information centres or websites.

This unit requires learners to evaluate their contribution to the planning of the study visit and their participation in it. Tutors should emphasise the importance of projecting the correct image and showing a positive attitude. Learners should be made aware of the likely consequences of their actions such as not being punctual and not respecting the needs of others, for example other visitors, peers, tutors. Tutors should encourage a group discussion on appropriate behaviour which leads to the group devising a mutually agreed code of conduct. Learners could also agree appropriate ways of responding to those who break the code of conduct whilst participating in the study visit.

Learners are required to evaluate the study visit itself. There are many sources of feedback including own, peers, tutors and other participants. It is recommended that learners should explore appropriate methods of obtaining feedback, for example own observations, questionnaires, interviews with peers and tutors. Learners should examine examples from organisations, eg questionnaires, customer feedback forms. Once selected, learners should discuss the questions to be asked based on the success criteria listed in the content. Learners should prepare the documentation for the selected methods in readiness for use on the visit and shortly afterwards. Once the study visit is complete learners should be encouraged to analyse the data and the responses and discuss whether or not the visit was successful and suggest ways in which it could be improved.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to the unit and the aim of study visits – videos of past visits, group discussions
Introduction to P1 assignment tasks Tutor observations of learners discussing how to develop a proposal: <ul style="list-style-type: none"> • Aims and objectives • Proposing a destination/venue • Considerations to be taken into account • Constraints to be taken into account.
Small group research on different destinations and venues using computers and contacting venues, coach companies etc to obtain prices and information
Discussions and agreement about the visit
Assignment 1: Where Shall we Go? (P1, M1)
Feedback on assessment.

Topic and suggested assignments/activities and/assessment

Tutor input on the need for and the process of risk assessment

Examination of a variety of risk assessments

Tutor observations of discussions to identify potential hazards for the proposed study visit

Assignment 2: Risks and Hazards (P2, M2)

Feedback on assessment.

Assignment 3: My Contribution to the Study Visit (P3)

Feedback on assessment

Tutor input on methods of gathering feedback in order to judge the success of the study visit

Small group research to select the most appropriate methods to assess own contribution and whether or not the visit was a success

Preparing different methods of gathering feedback for assessment (P4)

Providing feedback on assessment.

Analysing feedback for own contribution and the results of the feedback from questionnaires, interviews etc to judge the success of the visit

Compiling a report based on the analyses to judge the success of the visit (M3)

Providing feedback on assessment

Assignment 4: Was the Visit a Success? (P4, M3, D1)

Feedback on assessment and unit review

Assessment

A variety of assessment methods could be used, including presentations, practical activities and displays, as well as the more formal written assignment approach. It is recommended that more than one method is used to cater for the different learning styles within a group.

The assessment criteria shown in the grading grid can be grouped together to enable learners to expand on one criterion in order to gain higher grades. The links are as follows: P1 and M1; P2 and M2; P3, P4, M3 and D1. Note that D1 requires evidence from all other criteria to fully achieve the requirements of this criterion. Where possible, learners should be encouraged and given the opportunity to meet the relevant higher grading opportunities at the same time as they attempt the appropriate pass criteria.

If some of the assessment evidence for this unit is generated through group work, learners should ensure that they each present their own evidence for assessment, demonstrating clearly where they have contributed to processes. Tutors should support this evidence with observation sheets where appropriate.

P1 - M1

For P1, learners are required to present their individual suggestions for a study visit. These do not necessarily have to be for the actual visit itself but proposals presented could be taken into consideration by the tutor when planning other study visits. Aims and objectives are an important starting point for the planning of a study visit. These should be discussed in the group but learners must present them individually. An example of a suitable aim might be 'to provide learning opportunities for the programme'. Learners must then include specific objectives which would help them achieve the aim(s). Aims and objectives should include all those listed in the content: educational, personal development, interaction with others and the final outcome, eg course work, experience. An example of a suitable objective could be 'to gather evidence about what attracts visitors to the venue'. Learners are expected to evidence that they have taken into account constraints and other considerations. Examples of considerations have been provided in the content and learners should include those relevant to their study visit. For constraints, learners must include examples covering financial, legal and risk as detailed in the content.

Assessment evidence must include a proposal addressing all items listed in the content (items separated by semi-colons) including a full itinerary and a summary of how the proposal has taken account of all constraints and considerations.

The assessment evidence could be presented as a study visit information pack or as an oral presentation, accompanied by visual aids. Any oral presentation must be supported by additional evidence such as visual aids, rough notes and a comprehensive observation sheet completed by the assessor. Assessment must be on an individual basis. Questioning after the presentation can be used to confirm individual achievement.

For M1, learners should explain how their proposal will meet the aims and objectives and take account of constraints and considerations. This explanation will be an expansion of P1 where the learners will have stated the aims and objectives and outlined the constraints and considerations. The evidence for M1 will need to be fully explained (how the proposed study visit will meet the aims and objectives and how learners have taken account of constraints and considerations).

P2 - M2

For P2, learners do not have to complete a risk assessment but will be expected to show an understanding of the reasons why risk assessments have to be carried out before educational visits take place. Learners should discuss and evidence the reasons for risk assessment and ensure they have covered the legal requirements, the identification of and the reduction of risks, the safety of participants and the allocation of roles and responsibilities.

Although learners do not have to complete a risk assessment, they will need to discuss and evidence the process of risk assessment and ensure they cover the identification of hazards that include those relating to travel to, from and at the destination, method of transport, the venue, activities and free time. They should also include level of risk of the hazard, action to be taken to reduce risk hazards including code of conduct, written and verbal advice, use of reputable organisations and the student staff ratios.

For M2, learners should explain how the hazards and risks identified for P3 will be minimised and explain how the actions taken will work in reducing the risks and hazards. Completion of an actual risk assessment for the study visit is not required for either P2 or M2.

P3 - P4 - M3 - D1

To achieve P3, learners must contribute to the success of the study visit both by participating in the planning of the visit and by exhibiting positive behaviour during the visit. The extent to which learners can be involved in the actual planning of the visit will vary but tutors should ensure that each learner is involved in some aspect of the planning. This may take the form of researching and costing coach travel or researching different venues. Learners could be given individual topics to research and evidence could be presented as a short article to be included in a study visit booklet. Evidence could also be presented orally, as a short presentation before, during or after the visit, for example on the coach using the microphone. Before the visit learners should discuss and agree a group code of conduct. Positive participation during the visit must be evidenced by witness statements which should include tutor assessments, a self-assessment and peer assessments. Assessment evidence must cover the essential content and include the learner's contribution to planning the visit, responsibilities undertaken before the visit and participation in the visit itself.

For P4, learners must select and prepare at least two different methods of gathering feedback in order to evaluate the success of the study visit. Learners must ensure that feedback will cover all the success criteria items listed in the content. Learners will need to use methods of gathering feedback that will provide personal, peer and tutor evaluations, identification of personal strengths and weaknesses and areas for improvement. Methods chosen could include own observations, recorded interviews with tutors and peers using audio and/or video recordings and/or written records. Questionnaires can be used with tutors and peers to provide responses that can be analysed to support evaluations. The selection and preparation of the methods to be used to gather the feedback must be completed before the visit. During or after the visit the feedback methods will be used and the responses gathered in order to evaluate the visit. Evidence for P4 will be the selection and preparation of the methods and the actual feedback gathered with conclusions.

To achieve M3, learners must use the feedback and responses from peers and tutors to analyse their contribution and then make judgements about the success of the visit based on the responses and feedback from participants, including peers and tutors. These judgements must be based on whether the success criteria have been achieved. For example, did the responses and feedback relating to the learning opportunities provided at the venue meet the aims and objectives? Was the distance to the venue and the mode of transport used suitable and appropriate? If questionnaires are used the responses must be analysed and the results clearly presented, eg through tables, bar charts.

To achieve D1, learners must provide a detailed, coherent evaluation of the study visit taking into consideration the proposal, the aims and objectives, the process of risk assessment, their own contribution and the contribution of others, the methods of gathering the evidence, the analysis of the feedback and responses together with recommendations for future visits. These must be justified and realistic and based on evidence presented for P4 and M3. Recommendations might include reference to the venue, the location and distance travelled, the learning opportunities. P4, M3 and D1 could easily be combined in a written report, with appendices, eg completed questionnaires and notes of personal observations. D1 is an evaluation of all tasks undertaken to achieve all the learning outcomes for the unit, ie all the pass criteria, and evidence for D1 should contain reference to P1, P2, P3 and P4.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the assessment and grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, M1	Where Shall we Go?	You will be organising a travel and tourism study visit for your group.	Tutor observation records Information file for the proposed visit
P2, M2	Risks and Hazards	As part of your remit above you must ensure the safety of the group on the visit.	Tutor observation of discussions about reasons for and the process of risk assessment and the identification of potential hazards for the visit. Report detailing reasons for and the process and explaining how hazards and risks will be minimised.
P3	My Contribution to the Study Visit	As part of the above you must log your contribution during planning, prior to and on the study visit.	Detailed log of own contributions.
P4, M3 and D1	Was the Visit a Success?	As part of the above you have to gather feedback to judge the success of the visit.	Evidence of the selection and preparation of the different methods utilised to gather feedback in order to evaluate the success of the visit (P4). A written analysis of own contribution together with a written analysis of the feedback gathered (M3). A written evaluation of the success of the study visit from planning through to completion through the achievement of the aims and objectives and the analysis of the feedback (D1).

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC Travel and Tourism sector suite. This unit has particular links with:

Level 1	Level 2	Level 3
Planning a Trip to a Visitor Attraction	UK Tourism Destinations	Residential Study Visit in Travel and Tourism
	Exploring Marketing in Travel and Tourism	UK Visitor Attractions

Essential resources

For this unit learners need access to the internet or access to published material such as the travel trade press, newspapers and textbooks.

Employer engagement and vocational contexts

Learners will benefit from employers' engagement in the delivery and/or assessment of the unit. Tutors therefore need to approach employers early in the planning stages of the programme in order to try to initiate sustained engagement. Employers could help, for example, with the planning of unit delivery, or provision of visits and guest speakers. They could also help to design assessment tasks.

The delivery of this unit would be enhanced with engagement of local businesses/organisations.

This unit links to the following NOS in Travel and Tourism:

- TT08 Research travel and destination information
- TT20 Arrange travel itineraries.

Indicative reading for learners

Textbooks

Ingle S, King C, Kerr A, Jefferies M, Rock T and Spencer C (editor Woodhead V) – *Level 2 BTEC First Travel and Tourism Student Book*, (Pearson, 2010) ISBN 9781846907494

Ingle S, King C, Rock T and Spencer C (editor Woodhead V) – *Level 2 BTEC First Travel and Tourism Teaching Resource Pack*, (Pearson, 2010) ISBN 9781846906312

Journals and magazines

Travel Trade Gazette – Reed Business Information

Travel Weekly – CNP Information

Websites

GoSkills – Sector Skills Council for Passenger Transport www.goskills.org

Health and Safety Executive www.hse.gov.uk

Institute of Hospitality www.instituteofhospitality.org

People 1st – Sector Skills Council for Hospitality,
Leisure, Travel and Tourism

www.people1st.co.uk

Springboard UK

www.springboarduk.org.uk

VisitBritain

www.visitbritain.co.uk

Delivery of personal, learning and thinking skills (PLTS)

The table below identifies the opportunities for personal, learning and thinking skills (PLTS) that have been included within the pass assessment criteria of this unit.

Skill	When learners are ...
Creative thinkers	proposing a study visit, stating aims and objectives and taking into account constraints and considerations [CT 1]
Team workers	making a positive contribution on the study visit [TW 1]

Although PLTS are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
Independent enquirers	discussing the reasons for and the process of risk assessment, identifying potential hazards and risks for the proposed study visit [IE 1]
Reflective learners	analysing own contribution and the results of the feedback to judge the success of the visit [RL 1]

● Functional Skills – Level 2

Skill	When learners are ...
ICT – Use ICT systems	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	selecting and preparing different methods of gathering feedback to evaluate the success of the study visit
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	planning the assessment of the unit
Manage information storage to enable efficient retrieval	selecting and preparing different methods of gathering feedback to evaluate the success of the study visit
Follow and understand the need for safety and security practices	ongoing
Troubleshoot	as required
ICT – Find and select information	
Select and use a variety of sources of information independently for a complex task	selecting and preparing different methods of gathering feedback to evaluate the success of the study visit
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	selecting and preparing different methods of gathering feedback to evaluate the success of the study visit
ICT – Develop, present and communicate information	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> • text and tables • images • numbers • records. 	selecting and preparing different methods of gathering feedback to evaluate the success of the study visit analysing own contribution and the results of the feedback to judge the success of the visit
Bring together information to suit content and purpose	analysing own contribution and the results of the feedback to judge the success of the visit
Present information in ways that are fit for purpose and audience	analysing own contribution and the results of the feedback to judge the success of the visit
Evaluate the selection and use of ICT tools and facilities used to present information	as required
Skill	
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists	
Mathematics	
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations	analysing own contribution and the results of the feedback to judge the success of the visit

Skill	When learners are ...
Identify the situation or problem and the mathematical methods needed to tackle it	analysing own contribution and the results of the feedback to judge the success of the visit
Select and apply a range of skills to find solutions	analysing own contribution and the results of the feedback to judge the success of the visit
Use appropriate checking procedures and evaluate their effectiveness at each stage	analysing own contribution and the results of the feedback to judge the success of the visit
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	analysing own contribution and the results of the feedback to judge the success of the visit
Draw conclusions and provide mathematical justifications	analysing own contribution and the results of the feedback to judge the success of the visit
English	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	proposing a study visit stating aims and objectives and taking into account constraints and considerations discussing the reasons for and the process of risk assessment identifying potential hazards and risks for the proposed study visit
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	researching study visits
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions effectively and persuasively	proposing a study visit stating aims and objectives and taking into account constraints and considerations analysing own contribution and the results of the feedback to judge the success of the visit