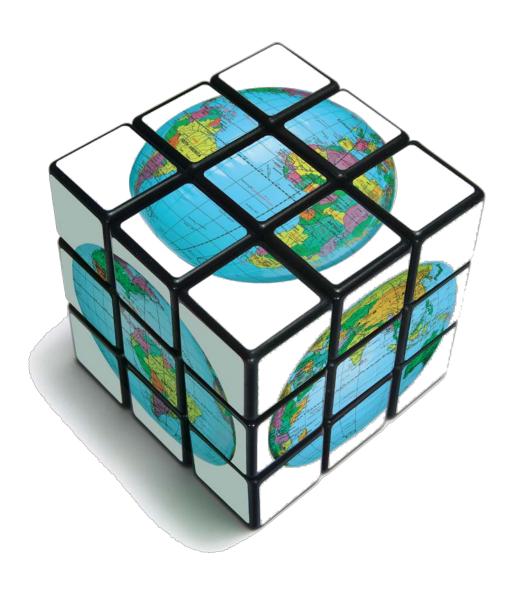
Level 3 NVQ Certificate in Tourism Services (4927-34/35)



Qualification handbook for centres

500/9961/9 Visitor Services Tour Guiding

www.cityandguilds.com September 2010 Version 1.2 (March 2012)



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Level 3 NVQ Certificate in Tourism Services (4927-34/35)



Qualification handbook for centres

www.cityandguilds.com september 2010 Version 1.1

Qualification title	Number	QAN
Level 3 Certificate in Tourism Services		
Visitor Services	4927-34	500/9961/9
Tour Guiding	4927-35	500/9961/9

City & Guilds

Skills for a brighter future



www.cityandguilds.com

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1 Introduction to the qualification

This document contains the information that centres need to offer the following qualification:

Qualification title and level	Level 3 NVQ Certificate a in Tourism Services	
City & Guilds qualification number	(4927-34/35)	
Qualification accreditation number	500/9961/9	
Last registration date	31/12/2013	
Last certification date	31/12/2016	

Area	The Level 3 Certificate in Tourism Services
Who is the qualification for?	meets the needs of candidates who work or want to work as a tourist guide or in a Tourist Information Centre in the tourism services sector
What does the qualification cover?	allows candidates to learn, develop and practise the skills required for employment and/or career progression in the tourism services sector.
Why has the qualification been developed?	provides valuable accreditation of skills and/or knowledge for candidates, without requiring or proving occupational competence replaces the City & Guilds Level 3 NVQ in Travel and Tourism Services (4847) which expires on 31/08/2010].

1.1 Qualification structure

To achieve the Level 3 NVQ Certificate in Tourism Services, learners must achieve 8 credits from the mandatory units and choose one pathway to complete the qualification, see diagram for a visual representation of the pathways.

The diagram below illustrates the unit accreditation numbers, unit titles, the credit value of each unit and if the unit is mandatory or optional.

Unit accreditation number	City & Guilds unit number	Unit title	Mandatory/ optional for full qualification	Credit value	Excluded combination of units (if any)
A/601/6601	Unit 301	Organise your work and personal development	Mandatory	4	N/A
D/601/6574	Unit 307	Analyse, evaluate and present tourism data	Optional	4	N/A
T/601/6600	Unit 308	Contribute to supporting and developing colleagues	Optional	5	N/A
J/601/1515	Unit 309	Monitor and solve customer service problems	Optional	6	N/A
L/601/6599	Unit 312	Contribute to maintaining the quality of travel and tourism operations	Optional	5	N/A
T/601/5785	Unit 313	Organise and implement travel and tourism promotional activities	Optional	4	N/A
D/601/6493	Unit 315	Deliver and evaluate interpretative commentaries	Optional	4	N/A
F/601/9354	Unit 316	Monitor procedures to safely control work operations	Optional	5	N/A
L/601/6571	Unit 317	Contribute to the production of promotional and interpretative media	Optional	5	N/A

T/601/6614	Unit 318	Manage the receipt of visitor services stock	Optional	3	N/A
L/601/6523	Unit 319	Source goods and services for visitors	Optional	5	N/A
L/601/6621	Unit 320	Manage the display of goods and information	Optional	5	N/A
M/601/6496	Unit 321	Deal with travel and tourism problems and emergencies	Optional	3	N/A
R/601/6510	Unit 322	Research and develop tour itineraries	Optional	8	N/A
D/601/5781	Unit 324	Research, plan and develop interpretative commentaries	Optional	4	N/A
T/601/6516	Unit 325	Manage the delivery of a tour	Optional	4	N/A
J/601/6536	Unit 329	Monitor business performance	Optional	4	N/A
A/601/5867	Unit 331	Ensure responsibilities for actions to reduce risks to health and safety	Mandatory	4	N/A

VISITOR SERVICES

8 mandatory credits from:

Unit 301
Organise your work
and personal
development
(4 credits)

Unit 331
Ensure responsibility
for actions to reduce
risks to health and
safety
(4 credits)

9 credits from:

Unit 312 Contribute to maintaining the quality of travel and tourism operations (5 credits)

Unit 329 Monitor business performance (4 credits)

8 credits from:

Unit 307 Anaylse, evaluate and present tourism data (4 credits) Unit 308 Contribute to supporting and developing colleagues (6 credits)

Unit 309 Monitor and solve customer service problems (4 credits) Unit 313
Organise and
implement travel and
tourism promotional
activities
(4 credits)

Unit 315
Deliver and evaluate interpretative commentaries (4 credits)

Unit 316 Monitor procedures to safely control work operations (5 credits)

Unit 317 Contribute to the production of promotional and interpretative media (5 credits)

Unit 318
Manage the receipt
of visitor service
stock
(3 credits)

Unit 319 Source goods and services for visitors (5 credits) Unit 320 Manage the display of goods and information (5 credits)

TOUR GUIDING

8 mandatory credits from:

Unit 301
Organise your work
and personal
development
(4 credits)

Unit 331
Ensure responsibility
for actions to reduce
risks to health and
safety
(4 credits)

8 credits from:

Unit 324
Research, plan and
develop interpretative
commentaries
(4 credits)

Unit 315
Deliver and evaluate
interpretative
commentaries
(4 credits)

8 credits from:

Unit 312 Contribute to maintaining the quality of travel and tourism operations (5 credits)

Unit 316 Monitor procedures to safely control work operations (5 credits)

Unit 317 Contribute to the production of promotional and interpretative media (5 credits)

Unit 321
Deal with travel and tourism problems and emergencies
(3 credits)

Unit 322 Research and develop tour itineraries (8 credits)

Unit 325 Manage the delivery of a tour (4 credits)

1.2 Opportunities for progression

On completion of this qualification candidates may progress into employment or to the following City & Guilds qualifications:

- Level 3 NVQ Diploma in Travel Services
- Level 3 Diploma in Travel and Tourism
- Level 3 Extended Diploma in Travel and Tourism

1.3 Qualification support materials

City & Guilds also provides the following publications and resources specifically for this qualification:

Description How to access	
Qualification handbook	Publications sales (SP134927)
Promotional materials	www.cityandguilds.com
Fast track approval form	www.cityandguilds.com

2 Centre requirements

This section outlines the approval processes for Centres to offer this qualification and any resources that Centres will need in place to offer the qualifications including qualification-specific requirements for Centre staff.

Centres already offering City & Guilds qualifications in this subject area

Centres approved to offer the qualification Level 3 NVQ in Travel and Tourism Services (4847) will receive automatic approval for the new Level 3 NVQ Certificate in Tourism Services (4927-31/32/33/34/35), which will be made available from the 01 August 2010.

2.1 Resource requirements

Human resources

Staff delivering this qualification must be able to demonstrate that they meet the following occupational expertise requirements. They should:

- have recent relevant experience in the specific area they will be assessing
- be occupationally knowledgeable in the area for which they are delivering training. This knowledge must be at least to the same level as the training being delivered
- update their occupational expertise and industry knowledge in the areas being assessed and verified through Continuous Professional Development
- have credible experience of providing training.

Centre staff may undertake more than one role, eg tutor and assessor or internal verifier, but must never internally verify their own assessments.

Assessors and internal verifiers

Centre staff should hold, or be working towards, the relevant Assessor/Verifier (A/V) units for their role in delivering, assessing and verifying this qualification or meet the relevant experience requirements outlined above.

Continuing professional development (CPD)

Centres are expected to support their staff in ensuring that their knowledge remains current of the occupational area and of best practice in delivery, mentoring, training, assessment and verification, and that it takes account of any national or legislative developments.

2.2 Candidate entry requirements

Candidates should not be entered for a qualification of the same type, content and level as that of a qualification they already hold.

There are no formal entry requirements for candidates undertaking this qualification. However, centres must ensure that candidates have the potential and opportunity to gain the qualification successfully.

Age restrictions

This qualification is not approved for use by candidates under the age of 16, and City & Guilds cannot accept any registrations for candidates in this age group.

3 Course design and delivery

3.1 Initial assessment and induction

Centres will need to make an initial assessment of each candidate prior to the start of their programme to ensure they are entered for an appropriate type and level of qualification.

The initial assessment should identify:

- any specific training needs the candidate has, and the support and guidance they may require when working towards their qualification. This is sometimes referred to as diagnostic testing.
- any units the candidate has already completed, or credit they have accumulated which is relevant to the qualification they are about to begin.

City & Guilds recommends that centres provide an induction programme to ensure the candidate fully understands the requirements of the qualification they will work towards, their responsibilities as a candidate, and the responsibilities of the centre. It may be helpful to record the information on a learning contract.

4 Assessment

4.1 Summary of assessment methods

For this qualification, candidates will be required to complete a portfolio of evidence for the **full qualification**.

4.2 Assignments

Witness Testimony

Witness testimonies can be obtained from people that are occupationally competent and whom may be familiar with the National Occupational Standards, such as the candidate's line manager. They may also be obtained from people who are not occupationally competent, and do not have a knowledge of the National Occupational Standards, such as other people within the candidate's workplace, customers and suppliers. The assessor must judge the validity of the witness testimony and these may vary depending on the source.

Expert witnesses may be used where additional support relating to the assessment of technical competence is required. Expert witnesses may be:

- other approved assessors that are recognised to assess the relevant National Occupational Standards, or
- line managers, other managers or experienced colleagues that are not approved assessors, but whom the awarding organisation/body agrees has current occupational competence, knowledge and expertise to make a judgement on a candidate's competence.

Expert witnesses must be able to demonstrate through relevant qualifications, practical experience and knowledge that they are qualified to provide an expert opinion on a candidate's performance in relation to the unit being assessed. People 1st believe that it is unlikely for an expert witness to be fully expert within any of the sector's occupational areas in less than twelve months to two years. The final judgement on the validity of the expert witness testimony rests with the assessor.

Professional Discussion

Professional discussion is encouraged as a supplementary form of evidence to confirm a candidate's competence. Such discussions should not be based on a prescribed list of questions but be a structured discussion which enables the assessor to gather relevant evidence to ensure the candidate has a firm understanding of the standard being assessed.

Simulation

Simulation can only be used to assess candidates for the sector's competence based units and qualifications where the opportunity to assess naturally occurring evidence is unlikely or not possible, for example assessment relating to health and safety, fire and emergency procedures. It should not include routine activities that must be covered by performance evidence. There are no units that can be solely achieved by simulation. In the case of imported units, where simulation is acceptable in the evidence requirements, it should only be used when performance evidence is unlikely to be generated through normal working practices.

4.3 Recording forms

Candidates and centres may decide to use a paper-based or electronic method of recording evidence.

City & Guilds endorses several ePortfolio systems. Further details are available at: **www.cityandguilds.com/eportfolios**.

4.4 Recognition of prior learning (RPL)

Recognition of Prior Learning (RPL) recognises the contribution a person's previous experience could contribute to a qualification. RPL is allowed and is also sector specific.

5 Units

Structure of units

The units in this qualification are written in a standard format and comprise the following:

- City & Guilds reference number
- level
- credit value
- unit accreditation number
- unit aim
- learning outcomes which are comprised of a number of assessment criteria
- guided learning hours
- relationship to NOS, other qualifications and frameworks
- endorsement by a sector or other appropriate body
- information on assessment
- notes for guidance.

City & Guilds unit number	Title	QCF unit number	Credits
301	Organise your work and personal development	A/601/6601	4
307	Analyse, evaluate and present tourism data	D/601/6574	4
308	Contribute to supporting and developing colleagues	T/601/6600	5
309	Monitor and solve customer service problems	J/601/1515	6
312	Contribute to maintaining the quality of travel and tourism operations	L/601/6599	5
313	Organise and implement travel and tourism promotional activities	T/601/5785	4
315	Deliver and evaluate interpretative commentaries	D/601/6493	4
316	Monitor procedures to safely control work operations	F/601/9354	5
317	Contribute to the production of promotional and interpretative media	L/601/6571	5
318	Manage the receipt of visitor services stock	T/601/6614	3
319	Source goods and services for visitors	L/601/6523	5
320	Manage the display of goods and information	L/601/6621	5
321	Deal with travel and tourism problems and emergencies	M/601/6496	3
322	Research and develop tour itineraries	R/601/6510	8
324	Research, plan and develop interpretative commentaries	D/601/5781	4
325	Manage the delivery of a tour	T/601/6516	4
329	Monitor business performance	J/601/6536	4
331	Ensure responsibility for actions to reduce risks to health and safety	A/601/5867	4

Level: 3 Credit value: 4

NDAQ number: A/601/6601

Unit aim(s)

This unit supports workforce development for those who organise their own work and personal development.

The unit is designed for any staff who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

- 1. Understand the principles of organising work and personal development
- 2. Be able to organise own workload
- 3. Be able to develop own personal performance
- 4. Know how to organise own work and personal development

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Organise your own work and personal development (approved as National Occupational Standard) unit TT21.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of organising work and

personal development

Assessment Criteria

- 1. explain the importance of continuously developing own skills and knowledge for self and the organisation
- 2. explain the importance of time management
- 3. explain the importance of planning and organising own work for self and for the organisation
- 4. explain the importance of having clear, realistic work objectives
- 5. describe how to clarify own objectives
- 6. explain the importance of planning for things that may go wrong
- 7. explain the importance of reviewing own work on a regular basis and adjusting own plans
- 8. explain the importance of updating own personal development plan on a regular basis and of involving other people in the process
- 9. explain the importance of practising new areas of skill and knowledge
- 10. describe how to find opportunities to practice new areas of skills and knowledge
- 11. explain the importance of prompt decision making to self and the organisation.

Outcome 2 Be able to organise own workload

Assessment Criteria

The learner can:

- 1. meet work objectives by
 - making the best use of time and resources
 - prioritising and planning activities
- 2. agree planned work objectives with manager
- 3. work to ensure unhelpful interruptions and diversions are kept to a minimum
- 4. follow development plans as closely as possible
- 5. ensure that work is completed satisfactorily
- 6. achieve work objectives within the agreed deadlines.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- all from work objectives
 - a) quantity of work
 - b) type of work
 - c) quality of work.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 3 Be able to develop own personal performance

Assessment Criteria

The learner can:

- 1. identify own personal career aspirations and the skills/knowledge needed to achieve them
- 2. assess own development needs against personal and the organisation's objectives at regular intervals
- 3. produce and agree suitable development plans with the relevant person where support from others is needed
- 4. recognise and take available opportunities to develop own skills and knowledge to meet known and anticipated work needs
- 5. seek and use feedback from others to help enhance own performance at work
- 6. review and update development plans at regular intervals.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

Outcome 4 Know how to organise own work and personal

development

Assessment Criteria

- 1. compare different ways to develop self
- 2. describe how to set objectives which are specific, measurable and achievable
- 3. explain how to estimate the amount of time required to carry out planned activities
- 4. explain how to measure own work progress
- 5. describe how to plan and organise own work to meet work objectives, making best use of time and resources available
- 6. describe how to identify and minimise unhelpful interruptions to planned work
- 7. explain how to assess own current level of competence
- 8. describe how to plan and carry out self-reviews
- 9. describe how to encourage and receive feedback from colleagues and manager
- 10. explain how to make constructive use of such feedback
- 11. explain how to develop and manage a personal development plan
- 12. outline current and foreseeable travel and/or tourism industry changes
- 13. describe how travel and/or tourism industry changes may affect the skills and knowledge needed to remain employable.

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Level: 3 Credit value: 4

NDAQ number: D/601/6574

Unit aim(s)

This unit supports workforce development for those who are engaged in tourism data analysis for colleagues and managers eg tour operators, tourism organisations and tourist information service providers and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand processes for analysing and evaluating tourism data
- 2. Be able to analyse and evaluate tourism data
- 3. Know how to analyse and evaluate tourism data
- 4. Be able to present the results of tourism data analysis
- 5. Know how to present the results of tourism data analysis effectively

Guided learning hours

It is recommended that **28** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand processes for analysing and evaluating tourism data

Assessment Criteria

- 1. explain the importance of factual reporting
- 2. explain the importance of maintaining confidentiality and security when handling tourism data
- 3. describe the operating implications of current data protection legislation.

Outcome 2 Be able to analyse and evaluate tourism data

Assessment Criteria

The learner can:

- 1. confirm the purpose of the data analysis with the relevant person
- 2. agree with the relevant person the required analysis and evaluation criteria
- 3. gather tourism data that is comprehensive, accurate and valid
- 4. extract and synthesise necessary information for the purpose of analysis
- 5. analyse and evaluate tourism data within agreed timescales and evaluation criterion.

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

Outcome 3 Know how to analyse and evaluate tourism data

Assessment Criteria

- 1. describe the purpose for which an analysis and report is required
- 2. describe the evaluation and analysis criteria procedures to follow
- 3. know the timescale for work to be undertaken
- 4. identify relevant information and data from small and extended documents
- 5. identify relevant and reliable sources of information within the organisation
- 6. identify required specialist expertise and/or information
- 7. describe how to access all relevant sources of tourism data and information
- 8. describe how to compare tourism data and statistics
- 9. describe how to synthesise information obtained to achieve the aims of the analysis
- 10. describe how to formulate conclusions and recommendations based on evidence gathered
- 11. describe when and how to archive materials.

Outcome 4 Be able to present the results of tourism data analysis

Assessment Criteria

The learner can:

- 1. present statistical tourism data clearly which conforms to the organisation's house style
- 2. produce clear, concise and factual **reports** of the analysis supported by valid evidence
- 3. identify any obvious trends in the information gathered and subsequent analyses
- 4. justify conclusions and propose realistic recommendations based on the information gathered and subsequent analysis
- 5. adapt presentations of results to meet the needs and interests of the target audience
- 6. forward **reports** from data analysis promptly to the relevant person(s) and in the required format.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from reports
 - a) written
 - b) oral.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 5 Know how to present the results of tourism data analysis effectively

Assessment Criteria

- 1. describe how to use appropriate language to suit the required formality and nature of a presentation
- 2. describe how to select an appropriate form of presentation of reports
- 3. describe how to organise written material coherently
- 4. describe ways to ensure presentations are accurate and error free
- 5. identify the person(s) to whom reports should be forwarded.

Level: 3 Credit value: 5

NDAQ number: T/601/6600

Unit aim(s)

This unit supports workforce development for those who support and help develop colleagues in any kind of travel or tourism activities.

The unit is designed for use primarily by supervisors, subject experts and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand the principles of supporting and developing colleagues
- 2. Be able to arrange and carry out team briefings to support and develop colleagues
- 3. Know how to plan and provide team briefings
- 4. Be able to support and train colleagues to improve effectiveness and personal development
- 5. Know how to support colleagues to improve their effectiveness and personal development

Guided learning hours

It is recommended that **44** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of supporting and

developing colleagues

Assessment Criteria

- 1. explain the importance of making sure colleagues understand what they have to do
- 2. explain the importance of making sure colleagues continue to be supported until they can achieve the standard required
- 3. explain why team briefings are important to the work of the organisation
- 4. explain the importance of discussing issues with colleagues absent from team briefings
- 5. identify ways in which issues can be discussed with those who cannot attend the briefings
- 6. explain the importance of acknowledging colleagues' achievements
- 7. explain the importance of complying with local and UK employment law when supporting and developing colleagues
- 8. explain the importance of staff retention to the organisation's operations
- 9. explain how organisational requirements affect support for colleagues.

Outcome 2 Be able to arrange and carry out team briefings to

support and develop colleagues

Assessment Criteria

The learner can:

- 1. obtain accurate information for **team briefings** from relevant sources
- 2. arrange **team briefings** conveniently for colleagues
- 3. explain the objectives of **team briefings** to colleagues clearly
- 4. prepare all necessary information for team briefings
- 5. present confidently and clearly, accurate information to colleagues at **team briefings**
- 6. conduct relevant **team briefings** to schedule
- 7. fulfil and maintain the objectives of **team briefings**
- 8. encourage colleagues to contribute to **team briefings**
- 9. offer feedback to colleagues when necessary
- 10. confirm that colleagues have understood the content of team briefings
- 11. deal with any misunderstandings before closing **team briefings**.

What you must do

The assessor must assess assessment criteria 1-11 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least three from team briefings
 - a) product updates
 - b) organisational updates
 - c) supplier promotions
 - d) competitors activities
 - e) sharing customer feedback.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 3 Know how to plan and provide team briefings

Assessment Criteria

- 1. explain the importance of arranging team briefings conveniently for colleagues
- 2. explain the importance of ensuring colleagues are aware of the objectives of team briefings
- 3. explain the importance for colleagues to contribute to team briefings
- 4. explain how to encourage colleagues to contribute to team briefings
- 5. describe the importance of achieving the objectives of team briefings
- 6. explain why all instructions given and demonstration of tasks need to conform to legal and organisational requirements.

Outcome 4 Be able to support and train colleagues to improve effectiveness and personal development

Assessment Criteria

The learner can:

- 1. make all colleagues aware of the skills and knowledge that can be shared within a team to help improve and/or assist with effectiveness
- 2. offer colleagues support in areas which can be confidently and competently demonstrated
- 3. identify and provide suitable support/assistance to colleagues as soon as is required
- 4. allow colleagues to practice demonstrated tasks under supervision until they are confident and competent
- 5. give colleagues clear and structured instructions and explanations using language at an appropriate level
- 6. give colleagues relevant and sufficient information to meet work needs
- 7. ensure colleagues understand all work expectations and any misunderstandings are corrected
- 8. provide instructions and task demonstrations that are in line with **organisational and legal requirements**.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least three from organisational and any legal requirements
 - a) performance management
 - b) employment law
 - c) diversity policy
 - d) staff welfare requirements
 - e) retention policy.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 5 Know how to support colleagues to improve their

effectiveness and personal development

Assessment Criteria

- 1. identify areas in which support for colleagues is required
- 2. describe the implications of undermining colleagues' confidence
- 3. describe how discussions can be kept relevant to an agenda
- 4. describe the consequences of discussions becoming irrelevant to an agenda
- 5. describe how to recognise a colleague in need of support
- 6. explain how to instruct colleagues and demonstrate tasks clearly and correctly
- 7. describe how to provide constructive feedback
- 8. identify resources within in the organisation capable of providing support.

Level: 3 Credit value: 6

NDAQ number: J/601/1515

Unit aim

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will be able to:

- 1. Solve immediate customer service problems
- 2. Identify repeated customer service problems and options for solving them
- 3. Take action to avoid the repetition of customer service problems
- 4. Understand how to monitor and solve customer service problems

Guided learning hours

It is recommended that **30** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit directly relates to Unit C5 of the Customer Service NOS 2010.

Support of the unit by a sector or other appropriate body

This unit is endorsed by the Institute of Customer Service.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Solve immediate customer service problems

Assessment Criteria

- 1. respond positively to customer service problems following organisational guidelines
- 2. solve customer service problems when they have sufficient authority
- 3. work with others to solve customer service problems
- 4. keep customers informed of the actions being taken
- 5. check with customers that they are comfortable with the actions being taken
- 6. solve problems with service systems and procedures that might affect customers before customers become aware of them
- 7. inform managers and colleagues of the steps taken to solve specific problems.

Outcome 2 Identify repeated customer service problems and options for solving them

Assessment Criteria

- 1. identify repeated customer service problems
- 2. identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option
- 3. work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation.

Outcome 3 Take action to avoid the repetition of customer service problems

Assessment Criteria

- 1. obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated
- 2. action their agreed solution
- 3. keep their customers informed in a positive and clear manner of steps being taken to solve any service problems
- 4. monitor the changes they have made and adjust them if appropriate.

Outcome 4 Understand how to monitor and solve customer service problems

Assessment Criteria

- 1. describe organisational procedures and systems for dealing with customer service problems
- 2. describe the organisational procedures and systems for identifying repeated customer service problems
- 3. explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
- 4. explain how to negotiate with and reassure customers while their problems are being solved.

Evidence requirements

Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. Evidence collected in a realistic working environment or a work placement is not permissible for this Unit. Simulation is not allowed for any performance evidence within this Unit.

You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.

You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.

Your evidence must include examples of problems which are:

- brought to your attention by customers
- are identified first by you and/or by a colleague.

The problems included in your evidence must include examples of a:

- difference between customer expectations and what is offered by your organisation
- problem resulting from a system or procedure failure
- problem resulting from a shortage of resources or human error.

You must show that you have considered the options for solving problems from the point of view of:

- your customer
- the potential benefits to your organisation
- the potential risks to your organisation.

You must provide evidence that you have made use of options that:

- follow organisational procedures or guidelines
- make agreed and authorised exceptions to usual practice.

Level: 3 Credit value: 5

NDAQ number: L/601/6599

Unit aim(s)

This unit supports workforce development for those who quality assure day-to-day operations and systems including security procedures across the travel and tourism industries ie leisure and business travel agencies, tour operations, visitor services and guiding.

The unit is designed for use primarily by managers and supervisors and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

- 1. Understand the importance of maintaining standards
- 2. Be able to help maintain the quality and security of operations
- 3. Be able to help maintain the standard of supplied goods and services
- 4. Know how to help maintain the quality of travel and tourism operations

Guided learning hours

It is recommended that **37** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the importance of maintaining

standards

Assessment Criteria

- 1. explain the importance of monitoring operations and taking prompt remedial action
- 2. explain why it is important to identify the causes of problems and take effective action to resolve them and prevent their recurrence
- 3. explain the importance of keeping self and colleagues up-to-date on quality assurance and security procedures
- 4. explain the importance of maintaining and enhancing customer and supplier goodwill and the image of the organisation.

Outcome 2 Be able to help maintain the quality and security of operations

Assessment Criteria

The learner can:

- 1. ensure that less experienced colleagues are aware of:
 - the standards of performance expected of them
 - the systems in place to measure standards of performance
- 2. monitor operations and security procedures against given measures at specified intervals
- 3. promptly rectify any operational deficiencies
- 4. implement agreed changes and improvements according to instructions
- 5. complete quality assurance records and reports accurately
- 6. forward completed quality assurance records and reports to the correct person.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- both from operations
 - a) for the benefit of customers
 - b) to meet the needs of the organisation
- at least three from security procedures
 - a) cash (and equivalents)
 - b) staff
 - c) customers
 - d) premises
 - e) equipment
 - f) information.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 3 Be able to help maintain the standard of supplied

goods and services

Assessment Criteria

The learner can:

- 1. identify variations from specification in the delivery of contracted products and services
- 2. report reasons for variations from specifications to the appropriate person
- 3. follow correct procedures to minimise the effects on customers of products and services being below specification
- 4. maintain the goodwill of external suppliers and the good image of the organisation.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Outcome 4 Know how to help maintain the quality of travel and tourism operations

Assessment Criteria

- 1. describe the types of supplier problems that can commonly affect customers
- 2. describe the types of measures available for quality assuring on-site travel and tourism operations, security and supplier performance
- 3. describe quality control and monitoring systems used in the organisation and how to apply them
- 4. summarise the contractual obligations of the suppliers in the area(s) for which you are responsible
- 5. describe the standards of personal performance, service and conduct for the organisation
- 6. describe how to deal with operational quality failures
- 7. identify the items in the area where you work that are classified as 'high value' and subject to special security arrangements
- 8. identify key holders responsibilities and how to contact them
- 9. describe role and responsibilities in ensuring the quality of operations, maintaining security and the delivery of services by suppliers
- 10. identify and summarise organisational policies and procedures covering all workplace operations, security and services provided to customers
- 11. outline organisational and local policies for sustainable tourism and how they should be implemented
- 12. summarise aspects of current data protection legislation relevant to the information that is
- 13. describe the type(s) of organisational quality control records and how and when to complete them
- 14. identify the person(s) to whom to report any quality related problems
- 15. describe how to deal with suppliers and others when things go wrong.

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Unit 313 Organise and implement travel and tourism promotional activities

Level: 3 Credit value: 4

NDAQ number: T/601/5785

Unit aim(s)

This unit supports workforce development for those who promote travel and tourism for visitors eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by travel agents, tour operators, providers of visitor services and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand the organisation and implementation of promotional activities
- 2. Be able to plan promotional activities
- 3. Be able to implement promotional activities
- 4. Be able to evaluate and revise promotional activities
- 5. Know how to organise and implement travel and tourism promotional activities

Guided learning hours

It is recommended that **31** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Organise and implement travel and tourism promotional activities (approved as National Occupational Standard) unit TT42.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 313 Organise and implement travel and tourism

promotional activities

Outcome 1 Understand the organisation and implementation

of promotional activities

Assessment Criteria

- 1. explain the roles of promotional activities in the wider context of marketing products and services
- 2. identify and describe factors affecting the success of promotional activities in travel and tourism
- 3. summarise legislation and regulation relevant to promotional activities being planned and undertaken.

Unit 313 Organise and implement travel and tourism promotional activities

Outcome 2 Be able to plan promotional activities

Assessment Criteria

The learner can:

- 1. agree the aims, objectives and success criteria of promotional activities with the relevant person(s)
- 2. encourage others to contribute ideas for promotional activities
- 3. secure **resources** for the promotional activities
- 4. **plan** activities to meet organisational needs, procedures and **legal requirements**
- 5. **plan** contingency arrangements to take account of predictable problems
- 6. present plans in a format to suit the needs of all others involved
- 7. make suitable arrangements for the evaluation of the promotional activities.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **three** from **resources**
 - a) time
 - b) funding
 - c) people
 - d) materials
 - e) location/space
- at least three from legal requirements
 - a) health
 - b) safety
 - c) security
 - d) confidentiality
- at least two from plans
 - a) aims
 - b) objectives
 - c) activities
 - d) resources
 - e) success criteria
 - f) costing
 - g) roles and responsibilities
 - h) methods of evaluation.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Unit 313 Organise and implement travel and tourism promotional activities

Outcome 3 Be able to implement promotional activities

Assessment Criteria

The learner can:

- 1. undertake promotional and evaluation activities according to the agreed plan
- 2. check that suitable **promotional resources** are available and meet the quality and quantity needs of the activities
- 3. resolve any problems to minimise disruption
- 4. notify any necessary changes to the plan to all those affected.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- both from promotional resources
 - a) display materials
 - b) information materials.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Unit 313 Organise and implement travel and tourism

promotional activities

Outcome 4 Be able to evaluate and revise promotional

activities

Assessment Criteria

The learner can:

- 1. evaluate promotional activities against the planned objectives and success criteria
- 2. report the results of the evaluation promptly, clearly and accurately to the relevant person(s)
- 3. use outcomes of the evaluation to inform the type, use and content of future promotional activities
- 4. make recommendations for future activities that are supported by evaluation information.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Unit 313 Organise and implement travel and tourism

promotional activities

Outcome 5 Know how to organise and implement travel and

tourism promotional activities

Assessment Criteria

- 1. describe the promotional needs and procedures of the organisation
- 2. describe the features of the travel and tourism products and services to be promoted
- 3. describe organisational procedures for sourcing and securing promotional resources
- 4. explain the outcomes of previous promotional activities run by the organisation.

Level: 3 Credit value: 4

NDAQ number: D/601/6493

Unit aim

This unit supports workforce development for those who deliver interpretative commentaries for visitors eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by tour leaders and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

- 1. Understand the principles of delivering and evaluating interpretative commentaries
- 2. Be able to deliver interpretative commentaries
- 3. Be able to evaluate interpretative commentaries
- 4. Know how to deliver and evaluate interpretative commentaries

Guided learning hours

It is recommended that **35** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Deliver and evaluate interpretative commentaries (approved as National Occupational Standard) unit TT33.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of delivering and evaluating interpretative commentaries

Assessment Criteria

- 1. explain the need to react appropriately to current events, people and situations
- 2. describe the consequences of giving inadequate and inaccurate information
- 3. explain the importance of personal appearance
- 4. explain why rapport needs to be created and why sensitivity is important
- 5. explain why group and self positioning is important
- 6. explain why questions should be repeated to the whole group.

Outcome 2 Be able to deliver interpretative commentaries

Assessment Criteria

The learner can:

- 1. identify and meet key expectations of **customers** through **interpretive commentaries**
- 2. ensure that **customers** can see and hear the commentary and without obstructing others
- 3. maintain **customers**' health, safety and security
- 4. present valid and accurate information
- 5. adapt commentary content and **delivery techniques** to maintain **customers'** interest and enhance their enjoyment throughout the tour in response to the environment **customer's** known interests, expectations and their reactions
- 6. make sure necessary adaptations to the tour itinerary are made in response to **customers'** requests and to meet their known needs and expectations
- 7. encourage **customers** to ask questions, seek clarification and make comments at suitable points in the commentary
- 8. ensure that any presentation aids are suitable for the immediate environment and are used correctly
- 9. provide clear and accurate summaries and additional information when requested.

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **five** from **customers**
 - a) users of home language
 - b) users of foreign language
 - c) individuals
 - d) groups
 - e) subject specialist
 - f) general
 - g) one age group
 - h) mixed age group
 - i) through interpreter
 - i) direct with customers
- at least one from interpretive commentary
 - a) on a geographical area
 - b) across a variety of sites
 - c) on a variety of different subjects
- at least four from delivery techniques
 - a) tone of voice
 - b) pace
 - c) language

- d) vocabulary
- e) non-verbal signals
- f) anecdotes
- at least **two** from **anecdotes**
 - a) before the tour
 - b) during the tour
 - c) in response to reasonable customer request
 - d) in response to hazard.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Unit 315 Deliver and evaluate interpretative

commentaries

Outcome 3 Be able to evaluate interpretative commentaries

Assessment Criteria

The learner can:

- 1. use suitable opportunities to collect and accurately record customer feedback on commentary performance
- 2. evaluate the content and presentation of commentaries against relevant success indicators and feedback
- 3. make changes and improvements to commentary presentation based on the results of evaluation of feedback and self-assessment.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

Outcome 4 Know how to deliver and evaluate interpretative commentaries

Assessment Criteria

- 1. explain why, when and how to use presentation equipment
- 2. describe how to find out about the interests, needs and expectations of tour groups
- 3. describe when and how to tailor presentations to take advantage of the immediate environment
- 4. identify the characteristics of different types of group and their needs in relation to a presentation
- 5. describe when and how to reinforce links with different aspects of group members' experiences
- 6. describe how to position self and the group effectively
- 7. describe how to structure, present and time commentaries so customers are alerted in good time to what lies ahead
- 8. explain why and how questions should be encouraged and how to handle them
- 9. describe how to focus on key points and reinforce them when necessary
- 10. give factual and other information associated with the tours and areas, sites and subjects
- 11. give any specific additional information likely to be requested by customers for the tour and commentary.

Level: 3 Credit value: 5

NDAQ number: F/601/9354

Unit aim

This unit is about making sure that statutory and workplace instructions are being carried out. It describes the competences required to make sure that:

- a) health and safety procedures are being followed within work areas
- b) appropriate action is undertaken to control workplace hazards.

Learning outcomes

There are **four** learning outcomes to this unit. The learner will:

- 1. Be able to check that health and safety instructions are followed
- 2. Be able to recommend changes to health and safety workplace instructions
- 3. Be able to make sure that hazards and risks are controlled safely and effectively
- 4. Know how to monitor procedures to safely control work operations

Guided learning hours

It is recommended that **35** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Details of the relationship between the unit and relevant national standards

This unit is based on National Occupational Standards originally developed by ENTO and now managed by ProSkills.

Support of the unit by a sector or other appropriate body

This unit is endorsed by Pro Skills.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Be able to check that health and safety instructions

are followed

Assessment Criteria

- 1. keep up-to-date with health and safety regulations and workplace instructions, making sure that information is from reliable sources
- 2. conduct monitoring of the workplace at agreed intervals and in accordance with workplace instructions
- 3. confirm that workers are health and safety competent as defined in their job role and that identified health and safety training needs have been met
- 4. communicate workplace instructions and receive feedback.

Outcome 2 Be able to recommend changes to health and

safety workplace instructions

Assessment Criteria

- 1. respond to any breaches of health and safety instructions in a way which meets workplace and legal requirements
- 2. make recommendations for any changes to health and safety workplace instructions to the responsible people.

Outcome 3 Be able to make sure that hazards and risks are

controlled safely and effectively

Assessment Criteria

- 1. maintain accurate records of workplace irregularities
- 2. check other people are aware of the hazards/risks and know the action(s) to be taken to minimise them
- 3. confirm that appropriate precautions to control risks have been agreed with the people responsible for health and safety
- 4. review to make sure all recommended action has been taken
- 5. report any conflicts that still exist between workplace and legal requirements.

Outcome 4 Know how to monitor procedures to safely control

work operations

Assessment Criteria

- 1. explain employers' and employees' legal responsibilities for health and safety in the workplace
- 2. explain the difference between 'hazard', 'risk' and 'control'
- 3. describe the types of information available from reports and records covering the workplace
- 4. explain the importance of evaluating information from reports and records covering the workplace.

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Level: 3 Credit value: 5

NDAQ number: L/601/6571

Unit aim(s)

This unit supports workforce development for those who contribute to the production of promotional and interpretative media for visitors, eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by tour leaders and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand principles underpinning the development and use of promotional and interpretative media
- 2. Be able to assist with the planning, delivery and siting of interpretative media
- 3. Know how to assist with planning, delivery and siting of interpretative media
- 4. Be able to develop and evaluate interpretative media
- 5. Know how to contribute to the development and evaluation of interpretative media.

Guided learning hours

It is recommended that **45** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand principles underpinning the

development and use of promotional and

interpretative media

Assessment Criteria

- 1. describe the basic principles of good design
- 2. describe the purpose of a design brief, the format and level of detail required and the time scale for its submission
- 3. explain why evaluation is important.

Outcome 2 Be able to assist with the planning, delivery and siting of interpretative media

Assessment Criteria

The learner can:

- 1. identify the purpose of the materials, their intended users and the resources available to produce and site them
- 2. ensure that suggestions for the production of new media do not duplicate suitable existing media
- 3. make suggestions for new materials that meet the organisation's legal and specified user requirements
- 4. describe how suggested new materials will achieve the purpose of the interpretation
- 5. suggest sites and locations for media that give maximum user visibility and access
- 6. identify the resources needed for suggested new materials
- 7. ensure that any media production contracted out to others is produced to specification, within budget and is delivered to the agreed time scale
- 8. site completed materials at the correct location in the specified manner
- 9. promptly report any issues that could adversely affect the production and siting of materials to the relevant person(s).

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

Outcome 3 Know how to assist with planning, delivery and siting of interpretative media

Assessment Criteria

- 1. describe the overall plan for the project being worked on
- 2. identify the type of location that best suits different groups of users and different activities
- 3. identify location of suitable sites for the area being worked in and any health and safety implications
- 4. compare the type and quantities of resources available for the production process
- 5. identify factors likely to affect the time scale and who should be involved in agreeing the time scale for production
- 6. identify the organisations involved in the production process and describe the nature of their involvement and responsibilities
- 7. describe the factors that could affect production and how these should be handled
- 8. describe how to monitor and track progress
- 9. describe how to handle suppliers when production is progressing well and badly
- 10. identify the person to whom to report and liaise during the production process and the limits of own authority
- 11. outline the policies of the organisation relating to the production of interpretative media.

Outcome 4 Be able to develop and evaluate interpretative media

Assessment Criteria

The learner can:

- 1. produce **materials** within time and **resource** constraints
- 2. ensure that the content of **materials** is an accurate, valid, reliable and honest interpretation of the subject matter
- 3. check that **materials** meet the needs of their intended users
- 4. check that **materials** are suitable for purpose and are capable of attracting the interest and enthusiasm of users
- 5. agree clear and relevant success indicators and means of collecting feedback with the relevant person(s)
- 6. evaluate and promptly report the effectiveness of the **materials**, in the required format, to the relevant person(s)
- 7. base relevant recommendations to enhance the success of subsequent materials on accurate evaluation.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least three from materials
 - a) leaflets
 - b) posters
 - c) informative signage
 - d) displays
 - e) websites
 - f) visual aids
- at least two from resources
 - a) time
 - b) money
 - c) people
 - d) skills.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 5 Know how to contribute to the development and evaluation of interpretative media

Assessment Criteria

- 1. describe how to draft persuasive and balanced suggestions
- 2. identify the intended users of the interpretative material and their requirements
- 3. identify the learning, behavioural and design objectives set for the interpretative media
- 4. describe the types of existing interpretative media and evaluate their success
- 5. identify sources of assistance and information and describe how to access them
- 6. describe the subject matter forming the content of the materials being worked on
- 7. illustrate any house style requirements relating to the design of interpretative media
- 8. describe how to present, write and sequence content for different types of users to achieve maximum impact, interest and visibility
- 9. explain the importance of testing the reliability and accuracy of information received
- 10. describe how to test the reliability and accuracy of information received
- 11. describe what constitutes an honest interpretation of the subject matter
- 12. identify any relevant current legislative requirements applicable to the production of media
- 13. describe how to ensure objectivity and impartiality when carrying out an evaluation
- 14. describe the types of success indicators relevant to the type of materials being developed
- 15. explain why it is important to use only relevant success indicators as a basis of evaluation
- 16. describe how to generate, record and prioritise relevant feedback
- 17. describe how to analyse information and draw relevant conclusions and recommendations
- 18. describe the required layout and presentation of evaluation reports.

Level: 3 Credit value: 3

NDAQ number: T/601/6614

Unit aim(s)

This unit supports workforce development for those who manage the receipt of stock for visitors eg tourist information offices, visitor centres, heritage sites.

The unit is designed for use primarily by any staff who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

- 1. Understand the principles of stock management
- 2. Be able to manage the receipt and storage of incoming stock deliveries
- 3. Be able to monitor procedures for receipt, handling and storage of stock
- 4. Know how to receive and store stock

Guided learning hours

It is recommended that **23** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 318 Manage the receipt of visitor services stock Outcome 1 Understand the principles of stock management

Assessment Criteria

- 1. explain why it is important to check incoming goods against requirements promptly after unloading
- 2. describe the causes of stock deterioration and damage
- 3. explain how stock deterioration can affect products.

Outcome 2 Be able to manage the receipt and storage of incoming stock deliveries

Assessment Criteria

The learner can:

- 1. ensure that staff who receive deliveries are aware of handling, monitoring and storage needs
- 2. ensure that storage facilities are suitable for the receipt of deliveries
- 3. monitor deliveries for compliance with the organisation's **order specification** and quality
- 4. ensure that procedures for rejecting any deliveries are followed including notification to the supplier
- 5. ensure that deliveries are unloaded and placed into storage safely and securely
- 6. ensure that **documentation** for all deliveries is accurate, complete and promptly processed.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least two from order specification
 - a) type of goods
 - b) quantity of goods
 - c) delivery time
- at least **one** from **documentation**
 - a) delivery notes
 - b) receipts
 - c) internal stock records.

Outcome 3 Be able to monitor procedures for receipt, handling and storage of stock

Assessment Criteria

The learner can:

- 1. carry out **checks** on delivery, handling and storage practices
- 2. **check** records of stock movements for accuracy and completeness
- 3. identify promptly out-of-date stock and stock at risk of deteriorating
- 4. ensure that prompt remedial action which meets both organisational and legal requirements is taken to deal with out-of-date stock and stock at risk of deteriorating
- 5. identify any problems with current stock receipt, handling and storage processes
- 6. take or recommend remedial action to resolve any problems with current stock receipt, handling and storage processes.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **checks**
 - a) monitoring documentation
 - b) spot checks.

Outcome 4 Know how to receive and store stock

Assessment Criteria

- 1. describe procedures for receiving goods, including dealing with discrepancies and late deliveries
- 2. outline recording and control systems, including procedures for checking goods received
- 3. describe safety and security procedures for receiving goods
- 4. identify legal requirements for storing stock
- 5. identify legal and organisational requirements for removing out-of-date stock
- 6. describe when and how to check stock and storage, including both routine and spot checks
- 7. describe how to prepare for the receipt and handling of different types of goods
- 8. describe how to assess the storage needs for goods on order
- 9. describe how to protect goods from deterioration and damage in a variety of circumstances
- 10. describe how to determine appropriate storage layout and solve storage problems efficiently, safely and securely
- 11. describe how to run the stock recording and controlling systems efficiently and accurately
- 12. describe how to evaluate the profitability of ideas for improving the procedures for moving and storing stock
- 13. identify the staff involved in or affected by a delivery schedule and the information they need to be able to receive goods efficiently
- 14. summarise your organisation's criteria for accepting goods
- 15. describe your organisation's requirements and quality standards for storage
- 16. identify the information colleagues require to be able to operate the storage system effectively
- 17. outline your organisation's systems and procedures for moving and storing stock
- 18. outline organisational policy and procedures relating to goods susceptible to damage or deterioration
- 19. outline your organisation's requirements for storing and moving stock, and how to monitor that these requirements are being met.

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Level: 3 Credit value: 5

NDAQ number: L/601/6523

Unit aim(s)

This unit supports workforce development for those who source goods and services for visitors eg information materials, souvenirs, tours, activities.

The unit is designed for use primarily by visitor centre, tourist information staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **six** outcomes to this unit. The candidate will:

- 1. Understand the process of sourcing goods and services
- 2. Be able to identify goods and services to be purchased
- 3. Be able to identify suitable suppliers of goods and services
- 4. Be able to purchase goods and services from suppliers
- 5. Be able to monitor the performance of suppliers
- 6. Know how to source goods and services

Guided learning hours

It is recommended that **39** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Source goods and services for visitors (approved as National Occupational Standard) unit TT44.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the process of sourcing goods and services

Assessment Criteria

- 1. explain the need for good working relationships between suppliers and the organisation
- 2. summarise the legal obligations of purchasing goods and services
- 3. outline organisational systems, procedures and legal rights for purchasing and returning goods
- 4. summarise the legal obligations of purchase and supply
- 5. describe organisational policies on paying creditors
- 6. identify the relevant person(s) regarding supplier account discrepancies.

Outcome 2 Be able to identify goods and services to be purchased

Assessment Criteria

The learner can:

- 1. check **stock records** to identify existing lines that need to be replenished
- 2. check with colleagues at appropriate intervals for any special ordering requirements
- 3. compare purchase requisitions to determine which items can be ordered in a bulk or single order.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **stock records**
 - a) manual
 - b) computerised.

Outcome 3 Be able to identify suitable suppliers of goods and services

Assessment Criteria

The learner can:

- 1. use **purchasing records** to find out who the regular suppliers are
- 2. **check** availability, prices and delivery times with suppliers
- 3. identify which suppliers meet organisation's rules and policies and match the **purchasing need**.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from purchasing records
 - a) manual
 - b) computerised
- at least **one** from **check**
 - a) via a website
 - b) using printed catalogues/price lists
 - c) on the telephone
- at least one from purchasing needs
 - a) price
 - b) quality
 - c) time of delivery.

Outcome 4 Be able to purchase goods and services from suppliers

Assessment Criteria

The learner can:

- 1. order items accurately from suitable suppliers
- 2. accurately calculate the total cost of orders
- 3. accurately keep up-to-date purchasing records
- 4. reconcile deliveries with orders accurately
- 5. identify outstanding purchase orders and take action
- 6. advise colleagues if orders will not be fulfilled on time
- 7. identify the **options** available for colleagues
- 8. follow procedures for returning goods and obtaining replacements.

What you must do

The assessor must assess assessment criteria 1-8 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **item**
 - a) goods
 - b) services
- at least **one** from **order**
 - a) online
 - b) manually completing order forms
 - c) on the telephone
- at least one from purchasing records
 - a) manual
 - b) computerised
- at least one from options
 - a) cancel the order
 - b) wait for the order to arrive
 - c) use an alternative supplier
 - d) order alternative items.

Outcome 5 Be able to monitor the performance of suppliers

Assessment Criteria

The learner can:

- 1. check the quality, price and timeliness of deliveries against organisational requirements
- 2. gather feedback from colleagues about the quality of items received from suppliers and the timeliness of their delivery
- 3. provide accurate feedback to suppliers on the level of service.

What you must do

The assessor must assess assessment criteria 1-3 by directly observing the candidate's work.

Outcome 6 Know how to source goods and services

Assessment Criteria

- 1. describe how to find potential new suppliers and assess the suitability
- 2. describe how to complain to suppliers
- 3. identify current suppliers
- 4. describe the types of goods and services the organisation requires
- 5. describe suppliers who have been used in the past and why they are no longer being used
- 6. describe organisational records kept about suppliers' performance, and how to access and interpret them
- 7. identify relevant person who can feedback on the quality and timeliness of goods or services received
- 8. describe how to use the stock records to find out what needs to be ordered
- 9. outline organisational constraints on choosing suppliers.

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Level: 3 Credit value: 5

NDAQ number: L/601/6621

Unit aim(s)

This unit supports workforce development for those who manage the display of goods and information for visitors eg heritage sites, attractions, visitor centres, tourist information centres. The unit is designed for use primarily by visitor services managers and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand the principles of displaying goods and information
- 2. Be able to organise the display of goods and services for visitors
- 3. Be able to assess the effectiveness of displays
- 4. Be able to maintain product availability and quality
- 5. Know how to manage the display of goods and information

Guided learning hours

It is recommended that **38** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to the National Occupational Standards as stipulated by People 1st.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of displaying goods and information

Assessment Criteria

- 1. describe the purposes of different types of display
- 2. explain how the positioning of product/service information helps promote products or services
- 3. explain why it is important to record price changes accurately
- 4. explain why it is important to keep complete and accurate display records
- 5. summarise the customer's rights and your organisation's duties and responsibilities relating to the Sale of Goods Act
- 6. outline the security, health and safety requirements and procedures relating to displaying goods.

Outcome 2 Be able to organise the display of goods and services for visitors

Assessment Criteria

The learner can:

- 1. confirm the **requirements** and standards of the **display** and, where necessary, check with the appropriate authority
- 2. explain clearly to staff the purpose, requirements and standards of the display
- 3. provide opportunities for staff to check their own understanding about the **requirements** and standards of **displays**
- 4. monitor staff to ensure that they prepare the display area and assemble the **display** in a manner that maintains **safety** and security and causes the least inconvenience to visitors
- 5. check assembled **displays** to ensure that they conform to requirements and standards
- 6. give feedback to staff on their performance
- 7. obtain any necessary permission to modify or change the **display** from the appropriate authority.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **requirements**
 - a) stock and space
 - b) location
 - c) safety and security
- at least two from display
 - a) seasonal
 - b) temporary
 - c) permanent
- at least one from purpose
 - a) to provide information
 - b) to promote sales of services or stock
- at least **one** from **standards**
 - a) organisation's policies and legal requirements
 - b) suppliers'/manufacturers requirements
- both from safety
 - a) of staff
 - b) of visitors.

Evidence for the remaining points under ' what you must cover ' may be assessed through questioning or witness testimony.

Outcome 3 Be able to assess the effectiveness of displays

Assessment Criteria

The learner can:

- 1. select suitable **criteria** to assess the effectiveness of the display
- 2. conduct a comprehensive assessment of the display using suitable criteria
- 3. invite staff to contribute to the assessment of the display
- 4. identify suitable adjustments and modifications to improve the display presentation
- 5. communicated required adjustments and modifications to displays to relevant staff
- 6. take action when assessments reveal security risks or hazards to the health and safety of visitors, staff, materials or stock.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least two from criteria
 - a) the accuracy or legibility of pricing information
 - b) the attractiveness of displays
 - c) the appearance and condition of stock and materials
 - d) the appearance and condition of fixtures and fittings (including health and safety features).

Outcome 4 Be able to maintain product availability and quality

Assessment Criteria

The learner can:

- 1. collect and record information on **price changes** accurately
- 2. ensure that up-to-date price information is available to relevant staff
- 3. routinely monitor price marking and take action to rectify problems
- 4. implement up-to-date stock replenishment plans correctly
- 5. identify out-of-date or deteriorating stock in line with organisational policy and any relevant legislation
- 6. identifying improvements to the display, presentation and organisation of stock
- 7. identify any potential improvements to the display, presentation and organisation of stock
- 8. obtain approval from the relevant person to make improvements to the display, presentation and organisation of stock
- 9. introduce improvements to the display, presentation and organisation of stock in ways that maintains customer goodwill and staff morale.

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least two from price changes
 - a) price increase
 - b) price decreases
 - c) special offers
 - d) promotions.

Outcome 5 Know how to manage the display of goods and information

Assessment Criteria

- 1. summarise the legal requirements which apply when pricing goods for sale
- 2. describe how to brief staff in a way that encourages their participation
- 3. describe how to monitor performance of staff preparing and assembling displays and how to provide feedback to staff on their performance
- 4. describe how to assess the effect of displays on sales and customer interest
- 5. describe how to identify and correct unsafe displays
- 6. describe how to collect, collate and record price information
- 7. describe how to monitor stock rotation and the quality of goods on display
- 8. describe how to monitor pricing and price marking, correct mistakes and implement price changes
- 9. describe how to use different price marking methods and technologies
- 10. describe the causes of stock deterioration and damage and how these impact upon products
- 11. describe how to calculate the type and quantity of resources required to implement displays
- 12. describe how to replenish and rotate stock and deal with sub-standard goods
- 13. summarise your organisation's display standards (including cleaning and preparation)
- 14. identify who can authorise changes in the display
- 15. describe how to check that information contained within displays is accurate and legal.

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Level: 3 Credit value: 3

NDAQ number: M/601/6496

Unit aim(s)

This unit supports workforce development for those who are responsible for helping customers eg resort representatives and managers on site and those in a relevant role at tour operator's head office.

The unit is designed for use primarily by tour operator staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **five** outcomes to this unit. The candidate will:

- 1. Understand the need for effective responses to problems and emergencies
- 2. Be able to respond to problems and emergency situations
- 3. Know how to respond to problems and emergencies
- 4. Be able to co-ordinate post-emergency situations
- 5. Know how to co-ordinate post-emergency situations

Guided learning hours

It is recommended that **24** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Deal with travel and tourism problems and emergencies (approved as National Occupational Standard) unit TT37.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the need for effective responses to

problems and emergencies

Assessment Criteria

- 1. explain why prompt help and good communications with customers, colleagues and other affected parties is important
- 2. describe the extent to which taking the correct action helps maintain good customer relationships and its value to the organisation
- 3. explain the importance of giving on-going support to those closely affected by emergencies.

Outcome 2 Be able to respond to problems and emergency situations

Assessment Criteria

The learner can:

- 1. produce an immediate plan of action that prioritises needs and is based on an accurate assessment of the **emergency situation** or **problem**
- 2. provide prompt and effective action to prevent escalation of the situation
- 3. give clear and relevant instructions to others assisting with the situation
- 4. call any relevant emergency services promptly
- 5. alert the correct authorities to any situation beyond personal authority or control
- 6. minimise any danger or distress to customers in the immediate vicinity
- 7. maintain an appropriate balance between the needs of the individuals and the group as a whole
- 8. ensure responses comply with organisational procedures and local requirements
- 9. minimise inconvenience to customers and maintain goodwill
- 10. keep accurate records of critical factors and key information where appropriate.

What you must do

The assessor must assess assessment criteria 1-10 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **two** from **emergency situation**
 - a) accident
 - b) fire
 - c) natural disaster
 - d) death
 - e) epidemics
 - f) serious individual illness and or condition
 - g) customer arrest
 - h) violence
 - i) lost people
- at least **two** from **problem**
 - a) accommodation
 - b) lost travel documents
 - c) non availability of transport
 - d) customers property.

Outcome 3 Know how to respond to problems and emergencies

Assessment Criteria

- 1. outline your organisation's procedures and guidelines for handling emergency situations
- 2. identify the limits of your authority and legal responsibilities for dealing with emergencies
- 3. describe action that can be taken to contain and handle emergency situations and the consequences of each
- 4. describe the factors that must be considered in order to arrive at the most suitable course of action and the consequences of failure to take such action
- 5. explain why different approaches may have to be used when considering the local situation and organisational policy
- 6. describe how to assess emergency situations
- 7. identify the position of emergency exits in the location(s) where you are working
- 8. identify the location of available emergency equipment and describe how to use it
- 9. identify emergency contact numbers and the nature of the help available
- 10. describe the role and scope of the local emergency services
- 11. describe the role and scope of the main support services provided by the local authorities
- 12. identify the types of records that must be completed in the event of an emergency and describe how to complete and submit them.

Outcome 4 Be able to co-ordinate post-emergency situations

Assessment Criteria

The learner can:

- 1. promptly and clearly notify all affected parties of the situation and its implications for them
- 2. secure the support of the correct authorities and **sources of assistance**
- 3. resolve any conflicts between local customs and the organisation's procedures
- 4. ensure that all customers affected by the emergency are aware of the situation and reassured
- 5. ensure that alternative arrangements are in place for customers unable to continue with their original plans
- 6. ensure that sympathetic support is provided as required to those directly affected
- 7. make available full and accurate records of the emergency to meet local, legal and the organisation's requirements.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least three from sources of assistance
 - a) insurers
 - b) suppliers
 - c) colleagues
 - d) fellow tour operators
 - e) assistance companies or services.

Unit 321 Deal with travel and tourism problems and

emergencies

Outcome 5 Know how to co-ordinate post-emergency

situations

Assessment Criteria

- 1. describe the role of any applicable assistance companies
- 2. give examples of the types of arrangements that can be made for customers unable to continue with their plans and how to instigate these.

Level: 3 Credit value: 8

NDAQ number: R/601/6510

Unit aim(s)

This unit supports workforce development for those who develop tour itineraries for visitors eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by tour designers, tour leaders and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **six** outcomes to this unit. The candidate will:

- 1. Understand the principles of researching and developing tour itineraries
- 2. Be able to research market opportunities for tours
- 3. Know how to research market opportunities for tours
- 4. Be able to research and develop tour outlines
- 5. Be able to develop detailed tour itineraries
- 6. Know how to develop tour outlines and itineraries

Guided learning hours

It is recommended that **72** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Research and develop tour itineraries (approved as National Occupational Standard) unit TT39.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of researching and developing tour itineraries

Assessment Criteria

- 1. explain the importance of identifying several tour options
- 2. diagnose hazards and potential risks to different customer groups
- 3. explain the importance of detailed itinerary planning
- 4. explain the importance of agreeing the operating parameters of tours and agreeing the degree of responsibility and authority the guide has in managing the tour
- 5. explain why confidentiality is important in researching and developing tours.

Outcome 2 Be able to research market opportunities for tours

Assessment Criteria

The learner can:

- 1. conduct research so that outcomes are based on relevant **market research techniques** and suitable sources of market information
- 2. examine viable gaps in the tour market for the geographical areas in which the organisation operates
- 3. formulate tour routes that show best potential for success
- 4. categorise target customer group(s) for tours and the means of reaching them
- 5. describe the tour and customer profiles with the greatest market potential
- 6. appraise any risks associated with promoting and selling proposed tours and measures suggested to manage such risk.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from market research techniques
 - a) desk research
 - b) field based research.

Outcome 3 Know how to research market opportunities for tours

Assessment Criteria

- 1. identify suitable sources of market information and describe how to access them
- 2. explain how to use and apply effective market research techniques
- 3. compare the key characteristics of different customer groups and the general requirements of each when on tour
- 4. develop the general criteria for assessing the success of tours
- 5. explain how to assess the market potential of a tour
- 6. identify the potential risks associated with marketing and selling tours and explain how to minimise risks
- 7. describe the type and depth of information necessary in order to make a realistic projection of customer take-up for a tour
- 8. explain how to carry out and produce a cost benefit analysis linked to each potential route.

Outcome 4 Be able to research and develop tour outlines

Assessment Criteria

The learner can:

- 1. develop **tour outlines** so that informed decisions can be made about the likely level of uptake by the target customer group
- 2. assemble the key features and components of the tour
- 3. identify potential suppliers that meet the expectations of the **target customer group**
- 4. identify the route options and hazards and potential risks for the **target customer group**
- 5. describe the levels of co-operation and availability needed from suppliers
- 6. identify any advanced booking requirements
- 7. calculate cost-benefit analysis for each potential route
- 8. agree a tour outline for further detailed development and identify any necessary development resources
- 9. specify targets and success criteria for the proposed tour.

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from target customer group
 - a) older people
 - b) mixed age
 - c) special interest
- at least three from tour outline
 - a) geographical area
 - b) subject
 - c) theme
 - d) distance
 - e) timescale
 - f) proposed start and finish points
 - g) places of interest
 - h) transport.

Outcome 5 Be able to develop detailed tour itineraries

Assessment Criteria

The learner can:

- 1. plan and specify the detail of tours
- 2. present detailed tour itineraries in the required format
- 3. negotiate agreements with all suppliers and parties involved in the tour that are clear comprehensive, acceptable, confirmed in writing and that maintain goodwill
- 4. define the roles of suppliers, colleagues and self in the tour.

What you must do

The assessor must assess assessment criteria 1-4 by directly observing the candidate's work.

Outcome 6 Know how to develop tour outlines and itineraries

Assessment Criteria

- 1. describe the roles and services that could be provided by suppliers
- 2. identify how to assess the type and extent of services required from suppliers when matched to the needs of the target customer group
- 3. describe how to define the tour requirements
- 4. describe how to identify and agree the relevant roles and responsibilities of self and suppliers
- 5. describe how to define the type and quantity of resources needed to develop a detailed itinerary
- 6. describe how to define and set tour objectives and criteria for success
- 7. identify factors commonly affecting itinerary design and planning
- 8. describe how to produce detailed tour costings
- 9. describe common difficulties in itinerary planning and ways to overcome them
- 10. explain how to plan for contingencies and the types of common problems that should be subject to contingency planning
- 11. describe how to estimate the effects of contingencies and unexpected delays
- 12. illustrate how to design flexibility into itineraries to enable suitable responses to changing circumstances during tours
- 13. describe how to identify and satisfy the itinerary requirements of customers with special needs
- 14. describe how to negotiate and agree contractual arrangements
- 15. describe how to identify and agree any constraints on what third parties can do
- 16. identify the basic current legal requirements affecting itinerary planning and agreement
- 17. identify format requirements of tour itinerary agreements
- 18. identify suitable channels and media through which to market tours to target customer groups
- 19. describe suitable sources of information for identifying key features and components of tours and how to access them
- 20. identify local regulations and customs affecting travel and tourism
- 21. describe any itinerary format and presentation requirements
- 22. explain how to agree operating parameters and define extents and levels of responsibility and authority, in tour planning.

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Level: 3 Credit value: 4

NDAQ number: D/601/5781

Unit aim(s)

This unit supports workforce development for those who prepare interpretive commentaries for visitors, eg local heritage sites, industrial sites, walking tours, bus tours.

The unit is designed for use primarily by tour leaders and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **four** outcomes to this unit. The candidate will:

- 1. Understand the principles of research, planning and development of interpretative commentaries
- 2. Be able to research information for interpretative commentaries
- 3. Be able to plan and develop material for interpretative commentaries
- 4. Know how to research, plan and develop interpretative commentaries

Guided learning hours

It is recommended that **29** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Research, plan and develop interpretative commentaries (approved as National Occupational Standard) unit TT32.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the principles of research, planning

and development of interpretative commentaries

Assessment Criteria

- 1. explain why it is important to maintain the currency and accuracy of commentary information given to customers
- 2. explain why it is important to carry out and check research
- 3. explain the importance of using a variety of sources and different types of information
- 4. explain the purpose of contextualising and adapting information to different customer groups
- 5. explain how backgrounds, level of interest and expectations of the tour affect customers' information requirements
- 6. describe the role of previous customer feedback in assisting the planning and development of interpretative commentaries.

Outcome 2 Be able to research information for interpretative commentaries

Assessment Criteria

The learner can:

- 1. establish the **scope** and purpose of research for commentaries fully and accurately
- 2. select and use suitable sources of information effectively
- 3. carry out research to the depth necessary to meet the expectations of intended audiences
- 4. use information that is accurate and relevant to the purpose of the commentary
- 5. complete research within the required time scale and budget
- 6. acknowledge sources to maintain the goodwill and co-operation of information providers.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least **one** from **scope**
 - a) a geographical area
 - b) a variety of different sites
 - c) a variety of different subjects.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 3 Be able to plan and develop material for

interpretative commentaries

Assessment Criteria

The learner can:

- 1. select information which is suitable for the intended audience(s)
- 2. structure information to provide a coherent and balanced presentation for each audience and itinerary
- 3. ensure that the intended content can be delivered within the planned time frame
- 4. source suitable interpretative media resources
- 5. review and adjust the commentary content and structure in response to feedback from previous tours
- 6. ensure that the final content of interpretative commentaries match the intended scope and objectives
- 7. obtain approval of completed commentaries and materials from the relevant persons, bodies or companies.

What you must do

The assessor must assess assessment criteria 1-7 by directly observing the candidate's work.

Outcome 4 Know how to research, plan and develop interpretative commentaries

Assessment Criteria

- 1. compare ways of storing research information to enable easy access and updating
- 2. describe how to deal with contradictory, ambiguous and inadequate information
- 3. identify the type of information needed to satisfy the scope and objectives of the interpretative commentary and describe how to select it
- 4. identify useful and relevant sources of information and how to access them
- 5. identify who to contact for information and advice on sources of research
- 6. explain ways and reasons for identifying the special interests and expectations of the customer
- 7. explain how to develop, maintain and acknowledge the co-operation of information providers
- 8. explain how to structure, adapt and link information to hold the interest of different types of customers and enhance their enjoyment and understanding
- 9. describe constraints on the giving of information applicable to the commentaries you are preparing and why it is important to maintain the confidentiality of such information
- 10. describe the legal and organisational constraints on using information in interpretative commentary
- 11. identify organisational requirements relating to the research, development and use of interpretative commentary materials.

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Level: 3 Credit value: 4

NDAQ number: T/601/6516

Unit aim(s)

This unit supports workforce development for those who manage the delivery of tours for visitors eg bus tours.

The unit is designed for use primarily by tour managers (rather than tour guides) and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **six** outcomes to this unit. The candidate will:

- 1. Understand the importance of managing tours effectively
- 2. Be able to ensure the delivery of tour itineraries
- 3. Be able to care for customers on a tour
- 4. Be able to carry out tour administration
- 5. Know how to manage tour group dynamics
- 6. Know how to manage delivery of a tour

Guided learning hours

It is recommended that **35** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Manage delivery of a tour (approved as National Occupational Standard) unit TT4.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand the importance of managing tours effectively

Assessment Criteria

- 1. explain the importance of maintaining good customer relations and goodwill
- 2. explain the importance of good time management when leading groups
- 3. explain the importance of giving accurate information on route and timings, before, during and at the conclusion of the tour
- 4. explain why it is important to brief customers fully on safety, welfare, local issues
- 5. explain the importance of respecting local customs, environmental, cultural and regulatory requirements in a tour area
- 6. explain factors affecting group behaviour
- 7. explain how age, customer mix and the size of group can affect the conduct of the tour
- 8. explain the importance of maintaining regular contact with colleagues.

Outcome 2 Be able to ensure the delivery of tour itineraries

Assessment Criteria

The learner can:

- 1. comply with the **programme** and timing agreed between the organiser and suppliers
- 2. deliver services to the standards and quality agreed by the organiser
- 3. give customers relevant, clear and accurate information at key points throughout the tour
- 4. implement contingency arrangements as necessary in response to any problems and disruptions
- 5. handle any unforeseen events to minimise disruption and reassure customers
- 6. maintain the goodwill of external suppliers and customers' positive image of the organiser.

What you must do

The assessor must assess assessment criteria 1-6 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least three from programme
 - a) route
 - b) breaks
 - c) visits
 - d) timings
 - e) accommodation
 - f) refreshments
- at least three from information
 - a) tour programme
 - b) local practical
 - c) local customs
 - d) local environment
 - e) basic local history
 - f) basic local socio-economic.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Manage delivery of a tour **Unit 325**

Be able to care for customers on a tour Outcome 3

Assessment Criteria

The learner can:

- 1. maintain a welcoming, calm, available and professional approach to customers
- 2. maintain customers' comfort, well-being and enjoyment
- 3. create a positive impression of the organisation
- 4. meet the needs and realistic expectations of customers
- 5. maintain customers' awareness of any local expectations
- 6. balance the needs and expectations of individuals with those of the whole group
- 7. avoid identified hazards that present an unacceptable risk to group members
- 8. take action in case of **problems** to minimise the effects and maintain goodwill
- 9. deal with emergency situations promptly and calmly.

What you must do

The assessor must assess assessment criteria 1-9 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from local expectations
 - a) cultural
 - b) social
 - c) environmental.
- at least **two** from **problems**
 - a) vehicle difficulties
 - b) minor accidents
 - c) illness
 - d) customers fail to follow the leaders instructions
 - e) customers conflict with one another
 - f) customer safety or security is compromised.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 4 Be able to carry out tour administration

Assessment Criteria

The learner can:

- 1. complete all required tour records and customer information and keep them safe and secure
- 2. ensure that customer and baggage check-in and check-out is smooth and efficient
- 3. provide clear and accurate information bulletins at suitable times and places
- 4. ensure that all administrative procedures comply with local, national and organisation requirements
- 5. promptly report any factors likely to affect future tours clearly to relevant person(s).

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

Outcome 5 Know how to manage tour group dynamics

Assessment Criteria

- 1. describe likely causes and consequences of disruptions to the group and others
- 2. identify potential risks to the health, safety and security of tour groups
- 3. describe means of controlling risks to the health, safety and security of tour groups
- 4. describe the relevant parts of current legislation to include Health & Safety, working with minors, equal opportunities and Disability Discrimination and their impact on conducting a tour
- 5. explain the importance of assessing risks throughout a tour
- 6. describe how to assess risks on an ongoing basis throughout a tour
- 7. describe how to handle groups on a tour including dealing with disruptive customers
- 8. describe how to ensure the smooth and effective transition of customers in and out of accommodation and other venues.

Outcome 6 Know how to manage delivery of a tour

Assessment Criteria

- 1. describe the detailed itinerary of the tour(s) and procedures for leading it
- 2. identify features of the itinerary in terms of what will be seen and what will be visited
- 3. describe customs, environmental, cultural and regulatory requirements in the tour area
- 4. identify the suppliers to be used and summarise their contractual arrangements
- 5. identify quality standards agreed by the organiser and describe the way these are to be monitored and measured
- 6. outline the background information you should give to customers for the tour(s) you are managing (ie local practical information, local customs, basic geographical features, basic historical and socio-economic aspects)
- 7. describe the options available and extent of your authority to deal with unforeseen events
- 8. describe the health and safety advice, guidance and procedures relevant to the tour you are conducting
- 9. describe the courses of action to take in the event of problems and emergencies and identify the local facilities available to deal with them and how to access them
- 10. identify the type(s) of documentation necessary for the particular tour(s) you are managing and describe how to complete them.

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Level: 3 Credit value: 4

NDAQ number: J/601/6536

Unit aim(s)

This unit supports workforce development for those who monitor business performance.

The unit is designed for use primarily by managers and supervisors in leisure and business travel agencies, tour operator field staff and others who carry out these workplace activities. The aim of the unit is to assess skills, knowledge and understanding to recognised National Occupational Standards.

Learning outcomes

There are **three** outcomes to this unit. The candidate will:

- 1. Understand business performance monitoring
- 2. Be able to monitor and improve business performance
- 3. Know how to monitor and improve business performance

Guided learning hours

It is recommended that **33** hours should be allocated for this unit. This may be on a full-time or part-time basis.

Details of the relationship between the unit and relevant national standards

This unit of assessment relates directly to Monitor business performance (approved as National Occupational Standard) unit TT50.

Support of the unit by a sector or other appropriate body

This unit is endorsed by People 1st.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Outcome 1 Understand business performance monitoring

Assessment Criteria

- 1. explain the key factors that can affect business performance in the travel and tourism industry
- 2. explain the importance of involving staff in the collection and analysis of performance data
- 3. describe how to identify key business targets and performance indicators by which business performance might be judged
- 4. identify what information on business performance needs to provided to others.

Outcome 2 Be able to monitor and improve business performance

Assessment Criteria

The learner can:

- 1. identify level of achievement of key business targets and performance indicators
- 2. ensure that relevant business records are accurate and up-to-date
- 3. investigate the causes of significant variations between planned and actual performance
- 4. encourage colleagues to make suggestions for improving business performance
- 5. develop viable plans for improving business performance.

What you must do

The assessor must assess assessment criteria 1-5 by directly observing the candidate's work.

What you must cover

There must be performance evidence, gathered through observing the candidate's work for:

- at least one from targets and performance indicators
 - a) sales
 - b) costs
 - c) service provision.

Evidence for the remaining points under 'what you must cover' may be assessed through questioning or witness testimony.

Outcome 3 Know how to monitor and improve business performance

Assessment Criteria

- 1. explain how to keep accurate and up-to-date records
- 2. describe current operational features in the organisation
- 3. describe how to analyse business performance data
- 4. describe a range of internal and external factors that may cause variations between target performance and that achieved
- 5. describe current market conditions in the industry and their possible effects on business performance
- 6. identify how frequently actual business performance needs to be checked to obtain reliable data
- 7. describe current local market conditions and the effects on the performance of the organisation
- 8. describe the consequences of possible changes in operational processes
- 9. explain the roles of colleagues and the effects that they may have on business performance
- 10. describe means of presenting ideas for measures to improve business performance
- 11. describe any required presentation formats for business performance information
- 12. describe how to assess the availability of resources needed to implement possible improvements.

Unit 331 Ensure responsibility for actions to reduce risks to health and safety

Level: 2 Credit value: 4

NDAQ number: A/601/5867

Unit aim

The aim of this unit is to provide candidates with the knowledge, understanding and skills to understand their health and safety responsibilities in the workplace.

Learning outcomes

There are **three** learning outcomes to this unit. The learner will:

- 1. Be able to identify the hazards and evaluate the risks in the workplace
- 2. Be able to reduce the risks to health and safety in the workplace
- 3. Know how to reduce risks to health and safety in the workplace

Guided learning hours

It is recommended that **38** hours should be allocated for this unit, although patterns of delivery are likely to vary.

Support of the unit by a sector or other appropriate body

This unit is supported by Pro Skills.

Assessment

This unit should be assessed against People 1st assessment strategy which can be found on People 1st website - **www.people1st.co.uk**.

Unit 331 Ensure responsibility for actions to reduce

risks to health and safety

Outcome 1 Be able to identify the hazards and evaluate the

risks in the workplace

Assessment Criteria

- 1. identify workplace instructions that are relevant to them and their job role
- 2. identify working practices and hazards in the workplace that could be harmful
- 3. evaluate the hazards and prioritise in risk order
- 4. report hazard(s) to the responsible person.

Unit 331 Ensure responsibility for actions to reduce risks to health and safety

Outcome 2 Be able to reduce the risks to health and safety in the workplace

Assessment Criteria

- 1. perform work activities at own level of competence in accordance with identified health and safety:
 - workplace policies
 - instructions and procedures
 - suppliers and manufacturers' information
 - and relevant legal requirements
- 2. manage hazards in accordance with workplace instructions and legal requirements
- 3. report any differences between workplace instructions and supplier/manufacturer instructions.

Unit 331 Ensure responsibility for actions to reduce risks to health and safety

Outcome 3 Know how to reduce risks to health and safety in the workplace

Assessment Criteria

- 1. explain their responsibility in remaining alert to hazards and risks
- 2. describe own responsibilities and scope for action in controlling risk
- 3. explain the importance of adhering to health and safety policies and practices
- 4. describe where and when to get additional health and safety assistance
- 5. describe the importance of personal presentation and behaviour in maintaining health and safety in the workplace.

Appendix 1 Relationships to other qualifications

Links to other qualifications and frameworks

City & Guilds has identified the connections to previous qualifications. This mapping is provided as guidance and suggests areas of overlap and commonality between the qualifications. It does not imply that candidates completing units in one qualification are automatically covering all of the content of the qualifications listed in the mapping.

Centres are responsible for checking the different requirements of all qualifications they are delivering and ensuring that candidates meet requirements of all units/qualifications. For example, units within a QCF qualification may be similar in content to units in the NQF qualification which the candidate may have already undertaken and this may present opportunities for APL.

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This qualification has connections to the:

NIOFita

• Level 3 NVQ in Travel and Tourism Services (4847)

NQF units Unit Number/Title		QCF units Unit Number/Title	
Unit 214	Process travel services bookings		
Unit 301	Organise your work and personal development	Unit 301	Organise your work and personal development
Unit 302	Improve the customer relationship		
Unit 303	Sell travel services		
Unit 304	Sell tailor made travel services		
Unit 305	Sell multi sector air travel		
Unit 306	Develop and maintain supportive relationships with telephone callers		
Unit 307	Analyse, evaluate and present tourism data	Unit 307	Analyse, evaluate and present tourism data
Unit 308	Contribute to supporting and developing colleagues	Unit 308	Contribute to supporting and developing colleagues
Unit 309	Monitor and solve customer service problems	Unit 309	Monitor and solve customer service problems
Unit 310	Contribute to business travel account management		

Unit 311	Build personal business traveller profiles		
Unit 312	Contribute to maintaining the quality of travel and tourism operations	Unit 312	Contribute to maintaining the quality of travel and tourism operations
Unit 313	Organise and implement travel and tourism promotional activities	Unit 313	Organise and implement travel and tourism promotional activities
Unit 314	Generate increased travel and tourism sales		
Unit 315	Deliver and evaluate interpretive commentaries	Unit 315	Deliver and evaluate interpretive commentaries
Unit 316	Monitor procedures to control risk to health and safety	Unit 316	Monitor procedures to safely control work operations
Unit 317	Contribute to the production of promotional and interpretative media	Unit 317	Contribute to the production of promotional and interpretative media
Unit 318	Organise the receipt and storage of goods	Unit 318	Manage the receipt of visitor services stock
Unit 319	Source required goods and services	Unit 319	Source goods and services for visitors
Unit 320	Maintain the availability of goods for sale to customers	Unit 320	
Unit 321	Deal with travel and tourism emergencies	Unit 321	Deal with travel and tourism problems and emergencies
Unit 322	Research and develop tour itineraries	Unit 322	Research and develop tour itineraries
Unit 323	Plan and deliver on site entertainment		
Unit 324	Research, plan and develop interpretative commentaries	Unit 324	Research, plan and develop interpretative commentaries
Unit 325	Manage the delivery of a tour	Unit 325	Manage the delivery of a tour
Unit 326	Complete foreign exchange transactions		
		Unit 320	Manage the display of goods and information
		Unit 329	Monitor business performance

Appendix 2 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Providing City & Guilds qualifications – a guide to centre and qualification approval contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification. Specifically, the document includes sections on:

- The centre and qualification approval process and forms
- Assessment, verification and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Frequently asked questions.

Ensuring quality contains updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document contains information on:

- Management systems
- Maintaining records
- Assessment
- Internal verification and quality assurance
- External verification.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information such on such things as:

Walled Garden

Find out how to register and certificate candidates on line

• Qualifications and Credit Framework (QCF)

Contains general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs

Events

Contains dates and information on the latest Centre events

Online assessment

Contains information on how to register for GOLA assessments.

City & GuildsSkills for a brighter future



www.cityandguilds.com

Useful contacts

	Contact	Query
UK learners	T: +44 0844 543 0000 E: learnersupport@cityandguilds.com	General qualification information
International learners	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intcg@cityandguilds.com	General qualification information
Centres	T: +44 (0)20 7294 2787 F: +44 (0)20 7294 2413 E: centresupport@cityandguilds.com	 Exam entries Registrations/enrolment Certificates Invoices Missing or late exam materials Nominal roll reports Results
Single subject qualifications	T: +44 (0)20 7294 8080 F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: singlesubjects@cityandguilds.com	 Exam entries Results Certification Missing or late exam materials Incorrect exam papers Forms request (BB, results entry) Exam date and time change
International awards	T: +44 (0)20 7294 2885 F: +44 (0)20 7294 2413 E: intops@cityandguilds.com	 Results Entries Enrolments Invoices Missing or late exam materials Nominal roll reports
Walled Garden	T: +44 (0)20 7294 2840 F: +44 (0)20 7294 2405 E: walledgarden@cityandguilds.com	 Re-issue of password or username Technical problems Entries Results GOLA Navigation User/menu option problems
Employer	T: +44 (0)121 503 8993 E: business_unit@cityandguilds.com	 Employer solutions Mapping Accreditation Development Skills Consultancy
Publications	T: +44 (0)20 7294 2850 F: +44 (0)20 7294 3387	LogbooksCentre documents

If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: **feedbackandcomplaints@cityandguilds.com**

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