Oxford Cambridge and RSA Examinations

OCR
RECOGNISING ACHIEVEMENT

GCSE IN LEISURE AND TOURISM: DOUBLE AWARD   1495

TEACHER GUIDANCE

Qualification Accreditation Number 100/1972/8

Contents

1   Introduction

1.1   GCSEs IN VOCATIONAL SUBJECTS

1.1.1 Introduction

GCSEs in vocational subjects have been designed to contribute to the quality and coherence of national provision. They have been developed following widespread consultation by QCA in the autumn of 2000 and are based on Part One GNVQs which received positive Ofsted reports. GCSEs in vocational subjects have a clear place in the Government's vision for secondary education for the next ten years.

These GCSEs have been designed to form qualifications which provide the technical knowledge, skills and understanding associated with each subject at these levels so as to equip candidates with some of the skills they will need in the workplace or in further education or training. They allow candidates to experience vocationally-related learning so as to enable them to decide if it is suitable for them.

GCSEs in vocational subjects are ideal qualifications for those candidates who want a broad background in the subject area and the course of study prescribed by these specifications can reasonably be undertaken by candidates entering the vocational area for the first time. They are designed to enable candidates to make valid personal choices upon completion of the qualification and to progress to further education, training or employment. GCSEs in vocational subjects provide a suitable basis for further study in the chosen subject or for related courses which could include GNVQs, VCEs, GCEs, NVQs or Modern Apprenticeships. They are designed to be delivered in full-time or part-time education.

1.1.2 Titles

This suite of qualifications is known by the generic 'GCSEs in vocational subjects'. The formal title that will appear on candidates' certificates is 'GCSE in *subject* (Double Award)'.

The subjects currently available are:

- Applied Art and Design;
- Applied Business;
- Applied Information and Communication Technology (ICT);
- Applied Science;
- Engineering;
- Health and Social Care;
- Leisure and Tourism;
- Manufacturing.

1.2 ADMINISTRATION

1.2.1 Key Points to Remember

Each unit has a single form of assessment, either internal (portfolio) or external.
External assessment is available in January and June from January 2004.
Postal portfolio moderation is available in January and June from January 2004.
Centres have a responsibility to enter candidates for the correct external assessments and portfolio units.

When entered for portfolio moderation, candidates' internal assessment scores must be submitted to OCR by a specified date (currently 10 January and 15 May). (See Section 1.2.3).

Candidates do not have to pass *all* three units to achieve the award. Good performance in some units can compensate for disappointing performance in others.

1.2.2 Registration, Entry and Certification

In order to offer GCSEs in vocational subjects, Centres should be registered with OCR. If a Centre is not already registered, this may be done through completion of a simple form obtained from the Centre Support Team at the start of the course of study. Centres are not required to register candidates with OCR.

Provisional entries are important because they form the basis for the despatch of coursework and early assessment materials to you and allow OCR to ensure sufficient examiners/moderators are recruited for a session. They are your best guess of the number of candidates you will be entering for particular units in that session. Centres should make provisional entries using form PE1N, currently by 21 September for the January session, and 5 November for the June session.

Entry forms are sent to Examinations Officers and should be returned to OCR by the published final entry date (normally during October and March) in order to enter candidates for January or June assessment. Entries must be made separately for each unit required, whether that unit is assessed externally or by portfolio.

Candidates choose when to claim their certificates. **A *separate* entry for certification must be made** *at the same time as* **the final unit entry. *It is essential to remember to make this entry*.** A fee is payable for each unit taken. There is no registration fee and no fee for certification.

1.2.3 Documentation

OCR will conduct all administration of the GCSEs in vocational subjects through the Examination Officer at the Centre. Teachers are strongly advised to liaise with their Examination Officer to ensure that they are aware of key dates in the administrative cycle.

Assessment Record materials, including full details of administrative arrangements for portfolio assessment, will be forwarded to Examination Officers in Centres following receipt of provisional entries. At the same time the materials will be made available within the Teacher's Guide and on the OCR website (www.ocr.org.uk). The materials will include master copies of mandatory forms on which to record assessments and will also include optional recording materials for the convenience of Centres. Forms may be photocopied and used as required.

The Assessment Evidence Grids

Centres are required to carry out internal assessment of portfolios using the *Assessment Evidence Grids* in accordance with OCR procedures. The process of using these grids is described in Section 2.4. Candidates' marks are recorded on these grids. One grid should be completed for each candidate's unit portfolio. These grids should be attached to the front of the candidate's portfolio for the unit when sent to the moderator.

When candidates are given their assignments, they should also be issued with a reference copy of the appropriate *Assessment Evidence Grid.*

Candidates' portfolios should be clearly annotated to demonstrate where, and to what level, criteria have been achieved. This will help in the moderation process. If teachers do this well it will be very much in the interests of their candidates. On completion of a unit, the teacher must complete the *Assessment Evidence Grid* and award a mark out of 50 for the unit. Details of this process are described in Section 2.4.

Submission of Marks to OCR

The involvement of OCR begins on receipt of entries for a portfolio unit from a Centre's Examinations Officer. Entries for units to be included in any assessment session must be made by the published entry date. Late entries attract a substantial penalty fee.

By an agreed internal deadline the teacher submits the marks for the unit to the Examinations Officer. Marks will need to be available by the portfolio mark submission dates published by OCR, currently 10 January and 15 May, and internal deadlines will need to reflect this. OCR will supply Centres with *MS1 Internal Assessment Mark Sheets* to record the marks and with instructions for completion. It is essential that Centres send the top copy of these completed forms to OCR, the second copy to the moderator and keep the third copy for their own records.

1.2.4 Portfolio Management

Portfolio work needs to be clearly referenced for easy tracking. It is likely that candidates will produce or collect other materials during teaching and learning activities which should *not* be assessed and should *not* be submitted to the moderator.

Teachers should assess the work as specified in the *Assessment Evidence Grids*. Assessors are required to sign the *Unit Recording Sheets* to confirm that the portfolio work is the candidate's own unaided work. This does not prevent groups of candidates working together to carry out research, but it is important to ensure that each individual candidate's work covers the requirements of the *Assessment Evidence Grid*.

If a Centre is unable to authenticate a candidate's work it must *not* be submitted for assessment.

Centres must complete the appropriate Assignment/Unit Recording Sheet in full and attach it to each piece of work sent for moderation.

Portfolio work provided to a moderator should be easy to access. Candidates are asked to avoid the excessive use of plastic wallets. For subjects where evidence is posted to moderators, Centres are advised to remove work from bulky files, and to ensure that each candidate's work is clearly identified by Centre number, Centre name, Candidate number, Candidate name, specification code and title and unit code.

Portfolio work should be retained until after the published deadline for *Results Enquiries* has passed. Centres may need to consider how the work should be stored after internal assessment has taken place.

1.2.5 Candidate Choice and Course Selection

OCR does not prescribe entry requirements for these GCSEs though appropriate levels of prior learning are specified in the introduction to the specifications.

OCR offers a range of qualifications which have differing assessment routes and may in some circumstances be more suitable for some candidates. These alternative qualifications include Entry Level Certificates, GNVQs, NVQs and OCR Entry Level Vocational Certificates.

1.2.6 Resources

Some GCSE units have significant resource implications and it is important that these are taken into account in selecting which GCSEs to offer. It is important to ensure that appropriate resources are available.

Consideration will need to be given to developing teaching and learning resources, library facilities, ICT and workshop facilities, learning resource centres, etc.

There are no particular resource implications but access to word processing facilities and the Internet which has hundreds of different sites covering a wide range of leisure and tourism activities is essential. Teachers are also advised to have access to the Travel trade press which can help with terminology and keeping up with events.

1.2.7 Moderation

Moderation will ensure reliability of a Centre's assessment of internally assessed portfolio work.

Centres are required to undertake internal standardisation prior to submission of portfolio scores for moderation. The moderator is required to consider a sample of candidates' work independently. Whilst moderators may seek clarification from a Centre, they cannot negotiate portfolio scores in any way.

The moderator must consider whether or not the Centre's assessment is reliable within a defined level of tolerance. The moderator may recommend an increase or reduction in marks for a particular unit, as appropriate.

It is important to ensure that the rank order in a Centre is correct. If Centre assessment is inconsistent, work will be returned to the Centre for re-assessment.

The following principles for the procedure for external moderation have been agreed:

- moderation will occur in both January and June;
- for each subject, the Centre submits to OCR marks for the required portfolio units, for a defined cohort of candidates;
- the moderator selects a sample of candidates;
- the moderator reviews the marks awarded for some or all portfolios to ensure correct application of national standards;
- any necessary adjustments are proposed by the moderator and checked by OCR officers prior to the application of scaling;
- the moderator completes a feedback form for each Centre;
- there will be a feedback report at the end of the moderation process from OCR;
- moderation will be by post. Remember to consult OCR for exact details (www.ocr.org.uk).

1.3   TIMETABLE FOR ASSESSMENT

1.3.1 External Assessment Dates

External assessments are offered in January and June from January 2004.

External assessments are held over a period of several weeks. Centres should check Final Examination Timetables for specific dates. This information is also available on the OCR website (www.ocr.org.uk).

1.3.2 Portfolio Moderation

Portfolio moderation is offered in January and June from January 2004.

1.3.3 Results Issue

Results will be issued in March and August, as currently for GCSEs.

1.4   PLANNING A PROGRAMME

1.4.1 Team Approach

Consideration of a team approach is recommended, with a view to identifying staff responsible for and time devoted to:

- candidate induction;
- delivery and assessment of the units (portfolio and externally assessed);
- candidate guidance and counselling;
- regular assessment planning and feedback;
- internal standardisation;
- delivery and assessment of Key Skills (if integrated into the programme).

1.4.2 Time to Plan

Substantial time is needed for planning the programme, allocating team members' responsibilities, developing assignments and assessments, evaluation and review of the programme.

1.4.3 Candidate Induction

Candidate induction should include familiarisation with:

- the 'vocational' process, encouraging candidates to take responsibility for their own learning;
- all candidate sections of the specification as appropriate;
- the *Assessment Evidence Grids*;
- the Key Skills units and signposting (if appropriate);
- organisation and referencing of portfolios.

1.4.4 External Links

Development of external links with local employers and FE colleges can provide an important resource for vocational GCSE programmes for:

- provision of source materials;
- professional and practitioner input;
- candidate visits;
- work experience;
- teacher placements;
- other means of increasing staff vocational expertise.

1.4.5 Delivery Models

Delivery models may vary and Centres may decide on:

- separate delivery of each unit;
- an integrated approach that uses teaching and learning activities across two or more units.

1.4.6 Timing

Consideration must be given to the timing of the delivery and assessment of units, whether externally tested or internally assessed (see Section 3).

1.5 UNIT STRUCTURE

Units will have some or all of the following sections:

About this Unit includes a brief description for the candidate of the content, purpose and vocational relevance of the unit. It states whether the unit is assessed externally or through portfolio evidence.

What You Need To Learn helps to develop the teaching and learning programme so that the candidates are able to produce the assessment evidence and are prepared for external assessments. *What You Need To Learn* is a framework for teaching and learning. It is written to be clear to candidates. It may be necessary to explain or introduce technical terms and concepts.

Producing the *Assessment Evidence* will allow the candidates to show that they can apply their skills and understanding of the key concepts of the unit. Although teachers must cover everything in the unit in the *What You Need To Learn* section, the candidates have to produce *only* the evidence stated in the *Assessment Evidence Grid* to meet the requirements of each portfolio unit.

You Need to Produce draws on all the learning detailed in *What You Need To Learn*, and specifies higher order activities which require the candidates to bring together the knowledge, skills and understanding and apply them to a vocational context. The assessment evidence requirements are designed to be flexible enough to allow teachers to make use of local opportunities.

The specific requirements to achieve the different grades available are outlined in the three columns.

Achievement of higher grades builds on the lower grades. At higher grades candidates can be expected to show increased sophistication and independence in their work.

In certain units additional tasks will be required for candidates to achieve higher grades. Teachers should refer to the *Guidance for Teachers* for further clarification. The *Guidance for Teachers* also gives suggestions on how to deliver the unit and how to emphasise its vocational context.

Key Skills Guidance provides signposts on how and where aspects of the Key Skills evidence can be integrated into the learning activities or the assessment evidence for the unit. This section does not replace the Key Skills units. Centres may prefer to use alternative Key Skills opportunities in the candidate's learning programme.

1.6 ASSESSING PORTFOLIOS

1.6.1 Applying the Assessment Criteria

The starting point in assessing portfolios is the *Assessment Criteria* within each unit. These list the skills, knowledge and understanding that the candidate is required to demonstrate. The *Guidance for Teachers* within the unit expands on these criteria and clarifies the level of achievement the assessor should be looking for within a candidate's work. General issues are also covered in the *Introduction* to the specification.

A further source of material will be the *Standardisation Handbook* which will be produced by OCR and available to all Centres at the Autumn INSET sessions. It may also be ordered from Publications (publications@ocr.org.uk). The Handbook includes examples of candidates' work, which help to exemplify standards.

In the Autumn and/or Spring terms OCR holds *Training Meetings* on Portfolio Assessment run by senior moderators. Details of these are in the OCR INSET booklets or they may be obtained from the OCR website (www.ocr.org.uk) or from Training and Customer Support Division (tel. 01223 552950).

OCR has formed a network of *Portfolio Consultants*. These are senior moderators who are available to give written advice to Centres on assessment of portfolios. Further details may be obtained from the appropriate Subject Officer (See Section 1.10.5).

1.6.2 Recording Achievement

Unit Recording Sheets are provided by OCR. Additional copies may be obtained from the OCR website (www.ocr.org.uk). Your Examinations Officer should also have a copy of these materials.

Teachers are required to keep a record of candidates' achievements and to indicate where the criteria have been achieved. This document should accompany the portfolio for the unit when sent to the moderator.

1.7 GRADING

GCSE (Double Awards) are graded on a scale from A*A* to GG.

1.7.1 Unit Grades

Teachers assess each portfolio unit and award a raw score on a scale of 0-50. The evidence required to support the award of marks is given in the *Assessment Evidence* section of each unit. The OCR awarding committee will consider portfolios and will determine the grade thresholds for each unit.

The following table indicates the notional thresholds for the unit, but these are subject to adjustment by the awarding committee.

Grade	A*A*	AA	BB	CC	DD	EE	FF	GG
Mark	45	40	35	30	25	20	15	10

The externally assessed unit will be marked by OCR. The maximum raw score will be stated on the front cover of the question paper.

1.7.2 Uniform Marks

Once the raw score for each unit has been established, it will be converted by OCR and reported to candidates as a Uniform Mark out of 100.

Uniform marks correspond to *unit* grades as follows:

	A*A*	AA	BB	CC	DD	EE	FF	GG
UMS (max 100)	90	80	70	60	50	40	30	20

Candidates who fail to achieve the standard for a grade GG will be awarded a Uniform Mark in the range 0-19 and will be recorded as U (unclassified).

1.7.3 Qualification Grades

The uniform marks awarded for each unit will be aggregated and compared to pre-set boundaries. Results for the qualification will be awarded on a scale of A*A* to GG and will be recorded on the certificate as such.

Uniform marks correspond to *overall* grades as follows:

	A*A*	AA	BB	CC	DD	EE	FF	GG
UMS (max 300)	270	240	210	180	150	120	90	60

Candidates who fail to achieve the standard for a grade GG will be awarded a Uniform Mark in the range 0-59 and will be recorded as U (unclassified).

1.8   KEY SKILLS

Key Skills form a separate qualification. However the Key Skills guidance within these qualifications has been designed to support the teaching, learning and assessment of both the GCSE and the Key Skill qualification. The signposting within each unit has been developed to show how vocational and Key Skills achievement can be successfully combined.

Each unit contains guidance on how Key Skills can be demonstrated through that unit. Teachers should refer to the Key Skills specifications in conjunction with the GCSE units.

For further information contact the Key Skills Team at OCR's Coventry office (tel. 024 7647 0033).

1.9   FREQUENTLY ASKED QUESTIONS

An updated set of Frequently Asked Questions may be found on the OCR website (www.ocr.org.uk).

1.9.1 Administration

Q   How do I *register* that I want to do GCSEs in vocational subjects?

A   *Any Centre that is registered with OCR for existing GCSEs will be automatically registered for these GCSEs in vocational subjects. There is no additional Centre Approval process.*

Centres that are not currently registered for any GCSE qualification with OCR should contact the Centre Support team (tel. 01223 553443) and will be asked to complete a straightforward registration form.

Q   Will candidates have a single candidate number for existing GCSEs and these GCSEs in vocational subjects with OCR?

A   *Candidates should have a single candidate number for both GCSEs and GCSEs in vocational subjects taken with OCR in a given examination session. A different number may, however, be allocated for entries in different sessions. In addition, for GCSEs in vocational subjects (as for all OCR unit based specifications) a 13-digit Unique Candidate Identifier (UCI) will be required, which should remain unchanged for all qualifications and all examination sessions.*

Q   Will candidates still have to register for these GCSEs?

A   *No. Candidate entry is made in October for January units and March for June units.*

Q   Will candidates be able to enter these GCSEs through EDI?

A   *Yes.*

Q   When will results be available?

A   *Both unit and certification results will be available in March and August (at the same time as other GCSEs) **provided that moderation deadlines have been met**. In 2004, the first certification results will be available in August.*

1.9.2   Grading and Assessment

Q   Can a candidate *fail* an individual unit and still pass overall?

A   *Yes. Candidates can compensate for relatively weak performance in a unit with relatively strong performance in the other two. The final grade is dependent on the total marks.*

Q   Will candidates be able to decline their award?

A   *No.*

Q   Does candidate evidence have to fulfil *all* the requirements specified in the banner of the *Assessment Evidence Grid* to achieve a grade G?

A   *No. The banner specifies the context in which the evidence must be presented and outlines how the points are awarded for the unit, but points equivalent to a grade G may be obtained even though some requirements may not be met. The assessment model used is a **compensatory** model where weakness in an area can be overcome by strength in other areas.*

Q   What happens to the candidate who has not achieved a first column criterion (in the *Evidence Assessment Grid*), but has achieved a criterion in a later column for the same assessment strand?

A   *Candidates' work need **not** necessarily fulfil the requirements of the first column criteria (in the Evidence Assessment Grid) before their work can be assessed against criteria in later columns. A 'best fit' approach is to be used. The teacher decides, for each assessment strand (i.e. each row in the grid), which of the three descriptions best fits the work being assessed. The marks awarded to all the strands are aggregated to arrive at the mark for the unit portfolio.*

Q   Can a candidate lose marks for handing work in late?

A   *No. Evidence should only be assessed against the assessment criteria and no additional criteria may be added. However, candidates must hand in work in sufficient time to enable Centres to meet OCR's deadlines.*

Q   How many times can an assessor mark candidates' work before it is submitted for external moderation?

A   *Candidates' work can be referred and feedback provided as many times as the assessor sees fit before final assessment and marks allocation. However, assessors should be aware that some criteria require candidates to work independently and repeated feedback could prevent achievement of such criteria.*

Q   Are witness statements, observation records etc. acceptable evidence for a unit?

A   *All forms of evidence are acceptable providing they **meet the requirements** of both the banner and criteria. This type of evidence is very much within the spirit of vocationally related awards. All witness statements, observation records etc. should be as detailed as possible **and clearly referenced** against the criteria. However, this type of evidence is unlikely to provide the sole source of evidence for a unit.*

Q   How do we know if we are applying the national standard when assessing candidates' work?

A   *OCR and other organisations will be providing support through events and publications and after the first round of moderation you will receive written feedback on how your assessments met national standards.*

        OCR will produce a series of publications which exemplify standards.

Q   Should candidates' work be internally standardised?

A   *Yes. The Code of Practice requires that OCR provides you with instructions to ensure that your internal standardisation arrangements reflect the requirements of moderation. Centres need to standardise candidates' work internally to ensure that standards are being applied consistently. Centres should satisfy themselves that standards are comparable between units within a subject.*

Q   What forms will the external assessments take?

A   *Generally these are single papers, marked out of 100, of one and a half hours duration. Exceptions are Applied Science which is a single tiered paper marked out of 70 and Applied Art and Design which is a ten hour practical based on pre-release material/work.*

Q   Is full coverage of the criteria necessary to pass the external assessment?

A   *External assessment will cover **all** the criteria associated with the unit. Each question has a number of marks attached to it. These are totalled to give a final mark irrespective of which criteria the questions related to. The final mark is compared to the boundary mark for each grade determined by the awarding body and this final mark is converted to a Uniform Mark Score.*

Q   What does it mean when OCR say there will be a *three mark tolerance* in the external moderation of portfolio units?

A   *Provided there is consistently **no more** than a three mark difference between the marks you award to a candidate's work and that awarded by the moderator, **your** assessment and allocated marks will not be adjusted. If **all** the differences between moderator and Centre marks are three or less, then the Centre marks are accepted.*

1.9.3 Miscellaneous

Q   Do teachers of GCSEs in vocational subjects need to have worked in the vocational area they are teaching?

A   *No, but Centres need to ensure that teachers have sufficient up to date knowledge and experience to be able to teach/assess a unit appropriately. There are a number of routes available by which staff may gain a vocational insight and these are to be encouraged e.g. work shadowing, mentoring.*

Q   Do teachers of GCSEs in vocational subjects need specific qualifications such as GPA or D units?

A   *No. Centres need to ensure they have the staff resources required for effective teaching/assessment of each GCSE. This may necessitate in-house training for teachers and those responsible for internal standardisation to ensure consistency in the interpretation and application of national standards.*

Q   How will Centres trigger the moderation process?

A   *By entering candidates for the portfolio units.*

Q   Will candidates be able to resubmit portfolio work for assessment?

A   *Candidates may rework their portfolios in consultation with their teachers. Moderators will, of course, need to know what additional advice has been received. After the portfolio has been formally assessed and the marks submitted to OCR, candidates may re-submit that portfolio **once more** at a later session in order to improve their mark.*

Q   Will candidates be able to rework portfolio work for assessment *after* marks have been submitted to OCR?

A   *No. Once marks have been submitted no further work may be undertaken in that session.*

Q   Will re-sits of *external* assessments be available?

A   *Yes, but candidates may re-sit each external assessment **once** only prior to certification. The higher mark will count towards the qualification.*

Q   What happens to the candidate who is entered for external assessment but does not attend?

A   *The entry is **not** counted for re-sit purposes but will score zero if they choose to aggregate.*

Q   What does a moderator do?

A   *Your moderator will sample your assessments of candidate work to ensure that internal assessments are to the appropriate national standards. Moderators will **not** discuss the work of individual candidates and will **not** be providing advice and guidance to Centres. Your Centre will receive written feedback from the awarding body at the end of the moderation process.*

Q   What is the difference between *internal* standardisation and *external* moderation?

A   ***Internal** standardisation should ensure consistency of assessment decisions within a Centre whereas **external** moderation ensures that individual Centre assessment decisions are in line with national standards. Candidates' marks allocation may be adjusted as a result of moderation if Centres assessment decisions are significantly different from those of the moderator.*

Q   What are the *procedures* for external moderation?

A   *The following principles have been agreed:*

- *moderation will occur in both January and June;*

- *for each subject, the Centre submits to OCR marks for the required portfolio units, for a defined cohort of candidates;*

- *the moderator selects a sample of candidates;*

- *the moderator reviews the marks awarded for some or all portfolios to ensure correct application of national standards;*

- *any necessary adjustments are proposed by the moderator and checked by OCR officers prior to the application of scaling;*

- *the moderator completes a feedback form for each Centre;*

- *there will be a feedback report at the end of the moderation process from OCR;*

- *moderation will be by post. Remember to consult OCR for exact details (*www.ocr.org.uk)*.*

Q   What happens if Centres do not submit *sufficient* candidate work for moderation before the cut-off date?

A   *OCR will not be able to guarantee candidates results will be available on the advertised dates, though it will make every effort to do so. Centres that are unable to meet these deadlines must write to OCR explaining their reasons.*

Q   How much teaching time will the new GCSEs in vocational subjects require?

A   *The new GCSEs in vocational subjects will require equivalent teaching time to **two** existing GCSEs.*

1.10   HELP AND SUPPORT

1.10.1 General Information

The OCR Website address is: www.ocr.org.uk

1.10.2 General Enquiries on GCSEs in Vocational Subjects

Contact the OCR Information Bureau on 01223 553998 or e-mail **helpdesk@ocr.org.uk**

1.10.3 Requests for Publications

Tel: 0870 870 6622
Fax: 0870 870 6621
E-mail**: publications@ocr.org.uk**

1.10.4 Entries

Entries are made through Examinations Officers. Enquiries relating to entries should be made only by Examinations Officers to the Candidate Data team on 01223 552599.

1.10.5 Subject-Specific Support

For all subject-specific enquiries other than those listed above, help and support is available from OCR Subject Officers: Leisure and Tourism. Tel: 01223 553795.

1.10.6 In-Service Training

Contact the Training and Customer Support team on 01223 552950.

2 The Mechanics of Grading Portfolios

2.1 SOURCES OF GUIDANCE

The starting point in assessing portfolios is the *Assessment Evidence Grid* [see Section 2.2] within each portfolio unit in each specification. These contain levels of criteria for the skills, knowledge and understanding that the candidate is required to demonstrate. The *Guidance for Teachers* within the unit expands on these criteria and clarifies the level of achievement the teacher should be looking for when awarding marks.

At INSET sessions in the Autumn term OCR will provide examples of candidates' work which help to exemplify standards around grades AA, CC and FF that have been agreed with QCA and the other Awarding Bodies.

In the Autumn and Spring terms OCR will hold training meetings on portfolio assessment led by senior GCSE moderators. Details are in the OCR INSET booklets which are sent to Centres in the Summer term or they may be obtained from the Training and Customer Support Division on 01223 552950. They are also published on the OCR website (www.ocr.org.uk).

OCR also operates a network of Portfolio Consultants. Centres can obtain advice on assessment of portfolios from an OCR Portfolio Consultant. These are both subject specialists and senior moderators. Details may be obtained from the OCR Subject Officer or Helpdesk (see Section 1.10).

2.3   ASSESSMENT EVIDENCE FOR UNIT 2: MARKETING IN LEISURE AND TOURISM

You need to produce an investigation into the marketing activities of **one** organisation from the leisure and tourism industry, including:

a a description of the products and/or services with pricing structures that the organisation offers [6 marks];

b a description of how the products and services are made available [7 marks];

c a description of the market research activities carried out by the organisation [7 marks];

d a comparison of the organisation's promotional campaign with the campaign of **one other** leisure and tourism organisation [8 marks];

e a SWOT analysis for the chosen organisation [9 marks].

You also need to produce:

f an item of promotional material related to the chosen organisation's product or service and aimed at a particular target market [13 marks].

A typical candidate at grades GG, FF, EE will:	A typical candidate at grades DD, CC, BB will:	A typical candidate at grades BB, AA, A*A* will:	Mark	Max
a1 Identify the products and/or services with pricing structures for the chosen organisation. **0 1 2**	**a2** Provide a detailed description of the products and/or services and pricing structures for the chosen organisation. **3 4**	**a3** Analyse the products and/or services provided by the organisation in relation to the pricing structures. **5 6**		**6**
b1 Identify at a basic level how the products and/or services are made available. **0 1 2**	**b2** Describe fully how the organisation makes its products and/or services available. **3 4 5**	**b3** In addition to a full description, recommend **one** alternative approach which the organisation could make to improve availability of its products/services. **6 7**		**7**
c1 Identify at a basic level the market research activities undertaken by the organisation to meet the needs of different customers. **0 1 2 3**	**c2** Provide a detailed description of the market research activities undertaken by the organisation to identify market segments. **4 5**	**c3** Evaluate the market research activities undertaken by the organisation in terms of cost effectiveness. **6 7**		**7**

d1 Comment briefly on the promotional materials/marketing mix of the both organisations. **0 1 2 3 4**	**d2** Suggest other relevant promotional techniques and materials both organisations could use to promote themselves and their products/services. **5 6**	**d3** Compare the promotional techniques and materials used by one organisation with those used by the other leisure and tourism organisation. **7 8**		**8**
e1 Produce a basic SWOT analysis for the chosen organisation. **0 1 2 3 4**	**e2** Produce a detailed SWOT analysis for the chosen organisation. **5 6 7**	**e3** Analyse the SWOT technique for the chosen organisation identifying areas the organisation needs to consider for future development. **8 9**		**9**
f1 Produce a piece of promotional material that includes the basic information for an identified target audience. **0 1 2 3 4 5 6 7**	**f2** Produce an item of promotional material that shows imagination and is appropriate for a stated target audience. **8 9 10**	**f3** Demonstrate ability to plan and produce their promotional materials, stating aims, objectives, target audience and evaluate the finished product. **11 12 13**		**13**
Note: Although you will be given an interim mark out of 50 by your teacher, this might be adjusted by OCR to make sure that your mark is in line with national standards.			**Total**	**50**

2.4   DETERMINING A CANDIDATE'S MARK

Each unit portfolio should be marked by the teacher according to the criteria in the *Assessment Evidence Grid* [See Section 2.3]. This specifies the evidence candidates need to produce in order to meet the requirements of each portfolio unit. It is divided into the following parts:

- *You need to produce* – this banner heading sets the context for providing the evidence, e.g. a report, an investigation, etc;

- *A typical candidate at grades GG to EE etc. will:* – this describes the quality of the work a candidate needs to demonstrate in order to achieve the grades specified.

Each row in the grid comprises a strand showing the development of a given criterion and corresponds to a point (**a**, **b**, **c** etc.) in the banner.

Each column describes the work undertaken by a candidate working within a range of grades. The criterion in the first column describes typical attainment of a candidate working within the range of grades GG to EE. The second column describes the work of a typical candidate working at grades DD, CC and the lower half of grade BB whilst the third column describes the work of a typical candidate working at the upper half of grade BB, grades AA and A*A*.

The maximum mark for that strand is shown in the right hand column.

Teachers use their professional judgement and circle the mark that *best fits* the work of the candidate and also record it in the column headed *Mark*.

Centres should use the full range of marks available to them; Centres must award *full* marks in any band for work which fully meets the criteria. This is work which is 'the best one could expect from candidates working at GCSE (Double Award) level'.

Only one mark per strand/row will be entered. The final mark for the candidate is out of a total of 50 and is found by totalling the marks for each strand.

Example: For a candidate's work that comfortably satisfies criterion **f2** and may be perceived as equivalent to the work of a grade CC candidate, a mark of **9** should be awarded on the scale for this strand of 0-13.

A typical candidate at grades GG, FF, EE will:	A typical candidate at grades DD, CC, BB will:	A typical candidate at grades BB, AA, A*A* will:	Mark	Max
f1 Produce a piece of promotional material that includes the basic information for an identified target audience. **0 1 2 3 4 5 6 7**	**f2** Produce an item of promotional material that shows imagination and is appropriate for a stated target audience. **8 ⑨ 10**	**f3** Demonstrate ability to plan and produce their promotional materials, stating aims, objectives, target audience and evaluate the finished product. **11 12 13**	**9**	**13**

The further guidance below clarifies the criteria in the *Assessment Evidence Grid* and will help you to determine the appropriate mark to be awarded for each strand. The marks should then be

added to give a total mark out of 50. Section 2.7.1 in the specification explains how this mark will be converted to unit grades.

Criterion	Exemplification
a1	Candidates must give a basic identification of the products/services of their chosen organisation which may be in a very simple format.
a2	Candidates need to give more detail about the products and services of the organisation, which may include more complex products, such as guided tours or coaching.
a3	Candidates must analyse the products and/or services of the organisation and relate this to the pricing structure used, including a list of prices with details of discounts, special offers etc.
b1	A simple statement as to how products and/or services given in **a1** are made available to the customers of the organisation is required by candidates to meet this criteria.
b2	Candidates will need to give a full description of how their chosen organisation make their products/services available to the customers with specific reference to place in the Marketing Mix.
b3	To achieve the higher marks candidates will need to recommend **one** viable alternative strategy for their chosen organisation in order that their products/services may be more available to customers.
c1	Candidates should describe the market research activities undertaken by their chosen organisation to meet the needs of different customers. This should cover a minimum of **three** of the bullet points in the *What You Need to Learn* section showing understanding of target markets and how organisations may offer a range of products to a range of different customers. This could specify a single product offered by a travel agency and identify the target market this was aimed at (e.g. families, senior citizens, specialist activity market).
c2	The description of market research activities undertaken by the organisation will need to contain more detail covering a wider range of products/services and identifying the target markets for these.
c3	Candidates will need to evaluate the market research activities undertaken by the organisation and be able relate these activities to their cost effectiveness in terms of improving/developing products and services.
d1-3	It should be noted that for all of **d** a **second** Leisure and Tourism organisation needs to be investigated to allow comparison. When selecting the second organisation careful consideration is needed to allow an appropriate and relevant contrast.
d1	A brief comment on a minimum of **four** types of promotional materials or techniques should be given by candidates, from the list of examples given in the *What You Need to Learn* section, and these should be clearly associated with each organisation. Examples may be presented by the candidates but additional comments should be made as to their effectiveness.

Criterion	Exemplification
d2	Following a study of promotional materials used by the organisations, candidates should recommend other relevant promotional techniques and materials each organisation could use in order to further promote the organisations and their products/services. All the promotional techniques and materials examples given in the *What You Need to Learn* section should be provided by the candidate and there should be some evidence of individual research undertaken by the candidate.
d3	To achieve the higher marks candidates will need to be able to compare the promotional materials identified in **d2** with those used by the other Leisure and Tourism organisation. For example, if the candidate's chosen organisation is a leisure centre, then they could compare its promotional techniques with those of another health club or leisure centre in the area.
e1	Candidates need to produce a SWOT analysis for their chosen organisation. Candidates should give a minimum of **one** example of *Strength, Weakness, Opportunity* and *Threat* for that organisation at the lower mark range. They should bear in mind that strengths and weaknesses refer to the *internal* operation of the organisation, such as range of facilities offered or lack of these; opportunities and threats are *external* factors, such as closure or opening of a new leisure facility in the area.
e2	A detailed SWOT analysis is required for the chosen organisation to meet this criteria and more than one feature identified for each SWOT box would lead to higher marks being awarded.
e3	For this criteria candidates need to analyse the SWOT technique for their chosen organisation, and should be able to identify the areas the organisation needs to consider for future development using appropriate technical marketing terms.
f1	Candidates should produce a piece of original promotional material, which should be related to their chosen organisation used in the earlier study. This piece of promotional material should clearly identify the target audience and include the basic information necessary (e.g. name of organisation, address, contact telephone number of the appropriate event).
f2	Having stated a target audience, candidates should produce an item of promotional material which is appropriate for that target audience, contain all the relevant information presenting this accurately, using imagination in terms of display or format.
f3	Candidates need to present supporting evidence of planning and work towards the final item of promotional material, stating the aims and objectives of the project, the target audience and a detailed evaluation of their final product in terms of appeal to the target audience, impact, use of colour and graphics.

Centres may find it helpful to use the assessment criteria holistically when initially assessing candidates' work. The outcome can then be compared with the final grade awarded through the procedure outlined above. If these differ, an explanation should be sought and the differences resolved.

3 Delivering the Specification

3.1 DELIVERING THE SPECIFICATION

Centres need to consider their programme of delivery carefully. The final pattern chosen will depend on a number of factors, including:

- if the course will be taught over one or two years;

- if the course will be taught by a single teacher or a team of teachers;

- Unit 1 may be examined in January and June;

- portfolio evidence for Units 2 and 3 may be submitted for moderation in January and June;

- if the Centre timetable makes blocks of time available;

- the relative advantages and disadvantages of *short, fat* units compared with *long, thin* units;

- if work experience will form or could be part of the course.

3.2 DELIVERING THE SPECIFICATION OVER TWO YEARS

3.2.1 A Possible Two Year Programme of Delivery:

Term	Delivery	Assessment
1	Teach Unit 1: *Investigating leisure and tourism.*	
2		
3	Continue teaching Unit 1; Prepare for Unit 1 test; Start teaching Unit 2: *Marketing in leisure and tourism.*	Unit 1 test
4	Continue teaching Unit 2; Complete Unit 2 portfolio.	
5	Teach Unit 3: *Customer service in leisure and tourism.*	Unit 2 portfolio; Re-sit Unit 1.
6	Continue teaching Unit 3; Complete Unit 3 portfolio.	Re-sit Unit 1; Re-sit Unit 2; Unit 3 portfolio.

N.B. Unit 3 could be delivered before Unit 2.

3.2.2 A Possible Two Year Scheme of Work:

Term 1: Unit 1

Week	Topic
1	**Introduction:** • to the course; • to Unit 1: *Investigating leisure and tourism.* **1.1 The leisure industry** • Introduction to: – the range of leisure activities; – the key components.
2	• The key components: – sport and physical recreation;
3	– arts and entertainment;
4	– countryside recreation;
5	– home-based leisure;
6	– children's play activities;
7	– visitor attractions;
8	– catering.
9	• Choosing leisure activities: – demographic factors;
10	– special needs; – cultural factors; – social factors;
11	– location and transport; – competing leisure facilities; – economic factors.
12	• Employment opportunities: – range of jobs.
13	**1.2 The travel and tourism industry** • Introduction to: – the purposes of visits; – the range of tourism activities; – different types of holiday; – types of destinations.

1	**1.2 The travel and tourism industry (cont'd)** • Different types of holiday: – package; – independent; – special interest; – short break;
2	– domestic; – in-bound and out-bound; – holidays involving short and long haul flights.
3	• The key components: – travel agents; – tour operators;
4	– tourist information and guiding services; – on-line travel services;
5	– accommodation and catering; – attractions;

6	– transportation:
	  - by air;
	  - by rail;
	
	  - by sea
	  - by road

7	• Types of UK tourist destinations: – coastal areas; – countryside areas;
8	– tourist towns and cities; – sporting venues; – theme parks; – places of historic interest.
9 **10**	• Case studies (including impacts): – destination 1 (local);
11 **12**	– destination 2 (national).
13	**1.2 The travel and tourism industry (cont'd)** • Employment opportunities: – range of jobs.

1	**1.3 Links between leisure and tourism**
2 3	- Revision of Unit 1: – the leisure industry; – the travel and tourism industry; – case studies; – practice questions.
4	**Examination Unit 1**
5	**Introduction to Unit 2:** *Marketing in leisure and tourism* **2.1 What is marketing?** - Basic principles of marketing.
6	**2.2 Target marketing** Identifying: – different groups of customers; – different customer needs; – different market segments.
7	**2.3 Market Research** - Market research methods; - Postal surveys; - Telephone questionnaires; - Personal surveys; - Observation; - Internet.
8	**2.4 The Marketing Mix** - Key elements organisations offer to meet customers' needs (the four Ps). - Product – including: – the product or service features; – the brand name; – the after-sales service; – product life-cycle. - Price: – selling price; – credit terms; – profitability.

9	• Place: – types of outlet or facility used; – location of outlets; – identification of distribution channels. • Promotion: – the different promotional techniques used to tell customers about and persuade them to buy its products and services; – advertising; – direct marketing; – public relations; – personal selling; – displays; – sponsorship; – demonstrations; – sales promotions.

Term 4: Unit 2 (continued)

1	**2.4 The Marketing Mix (cont'd)** • Promotional Materials: – advertisements; – brochures and leaflets; – merchandising materials; – videos; – press releases; – Internet sites.
2	**2.5 SWOT analysis** – the organisation's use of SWOT analysis to monitor performance • Strengths; • Weaknesses; • Opportunities; • Threats.
3	**2.6 Promotional campaigns** • Planning promotions carefully, achievement of maximum effect, making best use of resources: – what a promotional campaign tries to achieve (objectives);
4	– what promotional technique to use; – what promotional materials to use;
5	– how to monitor and evaluate the success of the campaign.
6	**Unit 2 portfolio assessment evidence for criteria a, b, c, d, e:** Candidates to: • collect evidence from a suitable source;
7	• investigate the marketing activities of the chosen organisation from the leisure and tourism industry;
8	• continuation of investigation;
9	• evidence collected to be prepared for portfolio assessment;

10	**Unit 2 portfolio assessment evidence for criterion f:** Candidates to: • collect evidence from a suitable source;
11	• produce an item of promotional material for a leisure and tourism product or service aimed at a particular target market;
12 13	• **complete Unit 2 portfolio evidence.**

Term 5: Unit 3 continued

1	**Submit Unit 2 portfolio.** **Introduction to Unit 3:** *Customer service in leisure and tourism* **3.1 What is customer service?** • Why good customer service is important; • What customer service includes; • Customer service situations.
2	**3.2 Different types of customer** • Individuals • Groups • People of different ages • Business men and women
3	• People from different cultures; • Non-English speakers; • People with specific needs.
4	**3.3 External and internal customers** • External customers; • Internal customers.
5	**3.4 Benefits of customer service** • To external customers (for the organisation); • To internal customers (for the staff and the organisation).
6	**3.8 Keeping customer records** • Types of customer records; • Creating customer records; • Filing and changing customer records; • The importance of accuracy and confidentiality.
7 8 9 10	**Portfolio assessment evidence for criteria a, b, c, d:** Candidates to: • collect evidence from a suitable source (visit to a leisure and tourism organisation/guest speaker/work experience); • produce a review of the customer service provided by one selected leisure and tourism organisation.

11	**3.6 Personal presentation** • Dress and personal hygiene; • Personality, attitude and behaviour.
12	**3.5 Communicating with customers** • Using appropriate language, voice, pauses etc. and body language; • Working accurately, listening and responding and asking appropriate questions;
13	• Communicating face-to-face;

Term 6: Unit 3 continued

1	**3.5 Communicating with customers (cont'd)** • Communicating over the telephone; • Communicating in writing.
2	**3.7 Handling complaints**
3 **4** **5**	**Portfolio assessment evidence for criteria e, f:** Candidates to: • collect evidence from a suitable source (work experience/part-time job/simulation/role play); • provide a record of their involvement in a variety of customer service situations; • provide a record of handling a customer complaint.
6	**Submit Portfolio for Unit 3.**

3.3   DELIVERING THE SPECIFICATION OVER ONE YEAR

3.3.1 A Possible One Year Programme of Delivery:

Term	Delivery	Assessment
1	Teach Unit 1: *Investigating leisure and tourism*; Start teaching Unit 2: *Marketing in leisure and tourism.*	
2	Continue teaching Unit 2; Complete Unit 2 portfolio; Start teaching Unit 3: *Customer service in leisure and tourism.*	
3	Continue teaching Unit 3; Complete Unit 3 portfolio; Prepare for Unit 1 examination.	Unit 1 exam; Unit 2 portfolio; Unit 3 portfolio.

N.B. Unit 3 could be delivered before Unit 2.

3.3.2 A Possible One Year Scheme of Work:

Term 1: Unit 1 and Unit 2

Week	Topic
1	**Introduction:** • to the course; • to Unit 1: *Investigating leisure and tourism;* • Employment opportunities in leisure and tourism. **1.1 The leisure industry** • Introduction to: – the range of leisure activities; – the key components.
2	• The key components: – sport and physical recreation; – arts and entertainment; – countryside recreation; – home-based leisure; – children's play activities; – visitor attractions; – catering.
3	• Choosing leisure activities: – demographic factors; – special needs; – cultural factors; – social factors; – location and transport; – competing leisure facilities; – economic factors.
4	**1.2 The travel and tourism industry** • Introduction to: – the purposes of visits; – the range of tourism activities; – different types of holiday; – types of destinations; • Candidates to choose **two** destinations (one local, one national) to use for examples where possible – see Week 9. • Different types of holiday: – package; – independent; – special interest; – short break;

5	– domestic; – in-bound and out-bound; – holidays involving short and long haul flights. • The key components: – travel agents; – tour operators;
6	– tourist information and guiding services; – on-line travel services; – accommodation and catering; – attractions;

7	– transportation:
	  - by air;
	  - by rail;
	  - by sea
	  - by road

8	• The key components: – sport and physical recreation; – arts and entertainment; – countryside recreation; – home-based leisure; – children's play activities; – visitor attractions; – catering. • Types of UK tourist destinations: – coastal areas; – countryside areas; – tourist towns and cities; – sporting venues; – theme parks; – places of historic interest.
9	• Case studies (including impacts): – destination 1 (local); – destination 2 (national).
10	**1.3 Links between leisure and tourism**
11	**Introduction to Unit 2:** *Marketing in leisure and tourism* **2.1 What is marketing?** • Basic principles of marketing. **2.2 Target marketing** • Identifying: – different groups of customers; – different customer needs; – different market segments.

12	**2.3 Market Research** • Market research methods; • Postal surveys; • Telephone questionnaires; • Personal surveys; • Observation; • Internet.

13	**2.4 The Marketing Mix**
	
	• Key elements organisations offer to meet customers' needs (the four Ps).
	
	• Product – including:
	  – the product or service features;
	  – the brand name;
	  – the after-sales service;
	  – product life-cycle.
	
	• Price:
	  – selling price;
	  – credit terms;
	  – profitability.
	
	• Place:
	  – types of outlet or facility used;
	  – location of outlets;
	  – identification of distribution channels.

Term 2: Unit 2 (continued) and Unit 3

1	• Promotion:
	  – advertising;
	  – direct marketing;
	  – public relations;
	  – personal selling;
	  – displays;
	  – sponsorship;
	  – demonstrations;
	  – sales promotions.

2	• Promotional materials:
	  – advertisements;
	  – brochures and leaflets;
	  – merchandising materials;
	  – videos;
	  – press releases;
	  – Internet sites.
	
	2.5 SWOT analysis – the organisation's use of SWOT analysis to monitor performance
	
	• Strengths;
	
	• Weaknesses;
	
	• Opportunities;
	
	• Threats.

3	**2.6 Promotional campaigns** • Planning promotions carefully, achievement of maximum effect, making best use of resources: – what a promotional campaign tries to achieve (objectives); – what promotional technique to use; – what promotional materials to use; – how to monitor and evaluate the success of the campaign.
4	**Unit 2 portfolio assessment evidence for criteria a, b, c, d, e:** Candidates to: • collect evidence from a suitable source;
5	• investigate the marketing activities of the chosen organisation from the leisure and tourism industry.
6	**Unit 2 portfolio assessment evidence for criterion f:** Candidates to: • collect evidence from a suitable source;
7	• produce an item of promotional material for a leisure and tourism product or service aimed at a particular target market.
8	**Introduction to Unit 3:** *Customer service in leisure and tourism* **3.1 What is customer service?** • Why good customer service is important; • What customer service includes; • Customer service situations. **3.2 Different types of customer** • Individuals; • Groups; • People of different ages; • Business men and women.
9	• People from different cultures; • Non-English speakers; • People with specific needs. **3.3 External and internal customers** • External customers; • Internal customers.
10	**3.4 Benefits of customer service** • To external customers (for the organisation); • To internal customers (for the staff and the organisation). **3.8 Keeping customer records** • Types of customer records; • Creating customer records; • Filing and changing customer records; • The importance of accuracy and confidentiality.

11	**3.6 Personal presentation** • Dress and personal hygiene; • Personality, attitude and behaviour. **3.5 Communicating with customers** • Using appropriate language, voice, pauses etc. and body language; • Working accurately, listening and responding and asking appropriate questions;
12	• Communicating face-to-face; • Communicating over the telephone;
13	• Communicating in writing. **3.7 Handling complaints**

Term 3: Unit 3 continued

1 2 3	**Portfolio assessment evidence for criteria a, b, c, d:** Candidates to: • collect evidence from a suitable source (visit to a leisure and tourism organisation/guest speaker/work experience); • produce a review of the customer service provided by one selected leisure and tourism organisation. **Portfolio assessment evidence for criteria e, f:** Candidates to: • collect evidence from a suitable source (work experience/part-time job/simulation/role play); • provide a record of their involvement in a variety of customer service situations; • provide a record of handling a customer complaint.
4	**Submit portfolios for Units 2 and 3.**
5 6	**Revision of Unit 1** • The leisure industry; • The travel and tourism industry; • Case studies; • Practice questions. **Examination Unit 1**

4 Externally Assessed Unit 1: Investigating Leisure and Tourism

4.1 SCOPE OF THE TEST

This unit will be externally assessed by a test lasting one and a half hours and there will be test opportunities available in January and June.

There will be **one** re-sit opportunity and therefore Centres need to consider carefully when would be the best time to enter candidates to sit the test. For a **two**-year course, the June of the first year would seem to be most appropriate, and offer a choice of re-sit opportunities. For a **one**-year course, the choice of the January opportunity needs to be balanced against the candidates' increased knowledge and maturity in June and the demands of portfolio completion and moderation.

The paper will contain **four** questions, each of which will be set in a vocational context and contain stimulus material. **Two** questions will be focused on the leisure industry and **two** on the travel and tourism industry. Candidates should be advised to spend about twenty minutes on each question.

The test will be written to allow candidates to demonstrate their mastery of the content specified in the *What You Need To Learn* section. Each question will provide opportunities for candidates to:

- show their knowledge and understanding of the leisure and tourism industries (AO1);
- apply their knowledge, skills and understanding of the leisure and tourism industries (AO2);
- examine (i.e. analyse, evaluate, make judgements and present conclusions about) leisure and tourism related issues and problems (AO3).

Questions will assume that candidates have studied, and are familiar with, both local and national (UK) examples of leisure and tourism organisations and destinations. Consequently *case studies* should form the basis of study for this unit. Case studies can take a variety of forms:

- visit to/speaker from a facility;
- video/paper-based case study;
- candidate research, which could be shared with the rest of the class through presentations, on paper or via a shared area on the network.

Visits, whilst highly desirable, take up teaching time and normally cost money; many organisations provide an educational visit option which is usually well worth taking up. *Speakers* may expect a fee or reimbursement of their travelling expenses; those working locally or with some connection with the Centre are the most likely to be willing to speak to candidates, and it is worth ensuring that the speaker's experience is a positive one if you wish him/her to return. Many organisations provide *information packs* and *videos*, either free or for a small charge and a great deal of information can be found in newspapers and on the Internet.

Often candidates take a 'hit and miss' approach to *research* and some training in research skills may prove to be worthwhile; checking the availability of material beforehand is a valuable precaution and can then provide a starting point for candidate research. Since the stimulus material used in the examination will consist of text, diagrams and statistical information it is important that candidates have had sufficient practice in deriving information from such sources. Encouraging candidates to contact organisations is a good idea in theory but often disappointing in practice since business priorities frequently dictate that the candidate receives either a standard answer, a late answer or no answer; it is often preferable for the teacher to make contact to discover what sort of response could be expected.

Since questions about jobs are likely to be placed in the context of specific facilities, candidates' awareness of the range of employment opportunities available in the leisure and tourism industries can be raised by ensuring that they consider jobs as part of any case study.

4.1.1 The Leisure Industry

Candidates will be expected to be familiar with the idea that the term 'leisure' covers a wide range of activities, which are provided by a variety of facilities and organisations and that leisure facilities in turn provide a number of products and services. It will be expected that candidates have studied examples of specific facilities and questions will often take the form of asking candidates about the stimulus situation and then asking candidates to refer, in detail, to an example they have studied. Since the stimulus material could be based on any of the seven key components it is important not only that candidates have studied all of them but also that they have been introduced to aspects of them with which they may be unfamiliar. For example, it may be assumed that most candidates are familiar with theme parks, football stadiums and cinemas so teachers may want to use as their case studies an historic building, a locally successful minority sports club, such as a hockey club, and a museum.

Candidates need to build up a picture of local leisure provision and to be aware of how it has changed during the last twenty years and questions about this could ask candidates to 'describe and explain'. Candidates also need to be made aware that leisure provision in other parts of the UK may differ from that found locally and candidates could expect questions that ask them to 'compare and contrast'. A visit to a local leisure centre would provide an excellent way of linking the first part of the leisure course, about the providers, with the second part of the course, which focuses on the customers.

Questions designed to investigate the candidates' understanding of the factors that influence peoples' leisure time choices may be based on stimulus material in the form of statistical information or maps and so teaching of this part of the leisure course could be based around the interpretation of such evidence. Candidates will also need to be able to see these choices from the viewpoint of a variety of different types of customers and role-play may be a valuable way of enabling them to do this.

4.1.2 The Travel and Tourism Industry

Candidates will be expected to know what 'tourism' is and that tourist visits may have a number of different purposes. They will need to know that there are different types of holidays and that holidays in the UK can be taken at a variety of tourist destinations. They will also be expected to understand that this wide range of travel and tourism activities is provided by organisations from the seven key components. It will be expected that candidates have studied examples of specific holidays, destinations, organisations and facilities; questions will often take the form of asking candidates about the stimulus situation and then asking candidates to refer, in detail, to an example they have studied. Since the stimulus material could be based on any of the holidays, destinations or seven key components it is important not only that candidates have studied all of them but also that they have been introduced to aspects of them with which they may be unfamiliar. For example, it may be assumed that many candidates are familiar with package holidays, Wimbledon and travelling by plane so teachers may want to use as their case studies a special interest holiday, Cowes Week and coach travel.

Questions will be set on the assumption that candidates have studied **two** destinations in detail, and that they have not only investigated the social, economic and environmental impacts of tourism on the destinations but have also considered how they may be developed in a sustainable manner. If one of the destinations is the local area, then a visit to the local tourist information centre and a speaker from the tourism department of the local council, would be very helpful. Candidates would greatly benefit from studying a contrasting destination to their local area. Questions about the impacts of tourism on destinations may be based on stimulus material in the form of statistical information or photographs and so teaching of this part of the travel and tourism course could be based around the interpretation of such evidence. Tourism Concern at www.tourismconcern.org.uk can help with resources and information about sustainable tourism.

4.1.3 Links between Leisure and Tourism

These may be investigated in any of the questions and candidates should be encouraged to identify such links, possibly as a conclusion to the rest of the course or as a revision activity. A visit to or case study of a tourism attraction complex, such as Flagship Portsmouth, or tourist city, such as York, could be used to enable candidates to identify links between, and the interdependence of, the leisure and tourism industries.

4.2   THE LANGUAGE OF TESTING

Candidates need to understand that each question contains one or more *key words* and that these *key words* tell the candidate what they are expected to do.

Key words include:

Compare	Explain the similarities and differences, or the advantages and disadvantages, between two areas. Disadvantages should be different from advantages, not just the opposite of them.
Evaluate	Measure something against set criteria
Contrast	In these questions you will need to think about the specific differences between two contrasting areas.
Describe	You must give an account in enough detail to make it clear to someone who is unfamiliar with the topic/concept etc.
Analyse	Respond to several elements of data, selecting, interpreting, arguing and providing suitable reasons for the arguments made.
Discuss	Put forward both sides of an argument and draw a conclusion at the end of the debate.
Explain	Make clear, give reasons.
Identify	Choose, list or name.
Justify	Think about why you have made a particular choice, giving reasons and examples.
Name	Give the specific name, usually of a leisure and tourism organisation.
State	Give a short statement which may only be one word.
Study	Read through text and look carefully at any maps, diagrams or statistics etc.

4.3   HINTS FOR CANDIDATES

**OCR Leisure and Tourism
Advice to Candidates**

DOs and DON'TS when answering examination questions

Here are a number of points which you should bear in mind when answering the examination questions.

- **Don't** waffle.

- **Don't** repeat the question in your answer.

- **Don't** give a vague or general answer when you are asked to be specific.

- **Don't** spend more than about **20 minutes** on each of the **four** questions.

- **Don't** waste time trying to think of an answer to a question worth only 1 or 2 marks if you are stuck – go on to the next question – you can always come back to it.

- **Do** scan through the question to find out what it is about.

- **Do** study the stimulus material, highlighting the relevant information.

- **Do** answer the question that is asked, making sure that you have done what the *key word* told you to do.

- **Do** use the number of lines and the number of marks as a guide to how much to write.

- **Do** give the number of answers asked for, not more.

- **Do** be precise when you are asked to name an example, so that the examiner could find it – not 'my local leisure centre' but 'The Spectrum, Guildford'.

- **Do** spend the last **10 minutes** or so filling in any gaps you have left and checking through your answers.

- **Do** have a guess if you don't know the answer to a question – you may be correct (and you don't lose marks for wrong answers).

4.4   SUGGESTIONS FOR TEACHING ACTIVITIES

Do give candidates a copy of the specification and familiarise them with them.

4.4.1 The Leisure Industry

This could be *introduced* with a discussion about how the candidates spend their leisure time (noted on the board) and lead to a definition of 'leisure', an understanding of its wide scope, the distinction between activities and facilities (definitions etc. available on OHP) and the division of the leisure industry into its key components (candidates could complete a worksheet, using the activities noted on the board).

The *key components* could be introduced by giving candidates (in groups) leaflets, advertisements etc. for local leisure activities and getting them to sort them into the correct components (sticking them on a chart/locating on a map/as a 'bingo' style game…). They could brainstorm national examples (and compile a class poster for each component). This work could be used to form a classroom display which would reinforce the forthcoming work.

Each key component needs to be studied. Candidates will need to know what is meant by the terms organisation, product and service (definitions etc. available on OHP). For each component candidates will need to be aware of the range of activities it includes, the facilities and organisations that provide for them and the products and services available in different facilities. Candidates should build up a detailed picture of local leisure provision as well as being aware of provision elsewhere in the UK.

Possible teaching activities include:

* brainstorm/quiz etc. (reinforced by worksheet) about the range of activities and facilities for a component;
* case studies (see comments in 4.1);
* the use of a proforma facility fact sheet for candidates to complete for each example;
* candidates progressively adding detail to maps of local and national provision;
* interviewing local people to establish how provision meets their needs;
* research to establish how local provision has changed over the past twenty years.

The factors that influence *choosing leisure activities* could be introduced by discussing with the candidates what determines their choice of leisure activities. (This could be extended by interviewing people/role play).

* The demographic and economic factors could be investigated statistically (using worksheets and the graphical options available in spreadsheet programs; candidates could work in pairs on one or two aspects only and make their work available to the rest of the class, on paper or via a shared area on the network).
* The special needs and cultural factors need to be handled sensitively and teachers may want to liaise with the relevant staff for ideas and materials (candidates could identify common needs and investigate provision in local facilities, devising their own grading system / scenario cards could be used to make suitable recommendations).

- Social factors could be investigated by encouraging candidates to identify why they make particular leisure choices (each candidate could complete phrases such as ' I chose to do X on Saturday because...' 'if money were no problem I would like to...' 'I no longer do X because...' / matching thumbnail sketches of individuals to leisure choices / identifying current trends).

- The influence of location and transport and the availability of local leisure facilities could be investigated (using maps of areas in other parts of the UK and a worksheet); this would provide useful practice for the interpretation of stimulus material in the examination. (possible locations for a new facility could be compared, using a scoring system / situation cards could be used to stimulate candidates into making and justifying a choice of leisure activity for a particular situation).

Some of the employment opportunities available in the leisure industry could be identified by candidates from the knowledge they have gained to date. Others could be found (by research into advertisements in trade periodicals, local papers and relevant Internet sites). This section could be delivered in conjunction with careers education and preparation for work experience. (Candidates could investigate one (or more) jobs in detail, using relevant videos, books etc. / interview people who work in the industry / produce a magazine article about a job).

Note: this section could be combined with the similar section about *employment opportunities in the travel and tourism industry*.

4.4.2 The Travel and Tourism Industry

This could be *introduced* by referring the candidates back to the specifications for a discussion of a definition of travel and tourism (definition available on OHP). Candidates could then discuss the purposes of visits (completing a worksheet with examples from their own experience or that of other class members). They could brainstorm the different types of holiday (completing a worksheet matching each holiday type with its definition) and identify the different types of holiday destinations in the UK (using an outline map, probably A3 size, and then naming examples, with the aid of an atlas). To sum up they could use brochures to produce posters (identifying the purpose(s), holiday type(s) and type of destination(s) – as well as the location – of a featured holiday). This work could be used to form a classroom display, which would reinforce the forthcoming work.

The *different types of holiday* could be investigated using information from brochures and the Internet. The essential features of each type could be clarified with the aid of an OHP and then investigated, in pairs or small groups, with the aid of a worksheet to be completed by each candidate. Investigating in-bound and out-bound holidays, and holidays involving short and long haul flights, will require the help of a map and atlas, to locate gateways, origins and destinations.

The *key components* can be investigated in a variety of ways. For each component candidates will need to be aware of the part it plays in the travel and tourism industry. Candidates should build up a detailed picture of local travel and tourism provision as well as being aware of provision elsewhere in the UK. As the examination will test candidates' knowledge of specific examples and include stimulus material this section provides an excellent opportunity for candidates to acquire detailed knowledge of examples and also to practise selecting relevant information from text and diagrams. The investigation of attractions should extend the work done on visitor attractions when studying the leisure industry.

Possible teaching activities include:

- case studies (see comments in 4.1);
- candidates progressively adding detail to maps of local and national provision.

Investigation of transportation could be map-based and involve candidates in Internet research to enable them to complete charts comparing cost, convenience and availability / make suitable transport suggestions for a variety of customers. The basic terms (such as port, gateway, hub etc.) and organisational structures will need to be explained first.

The *types of UK tourist destinations* can be introduced by reference to the map produced earlier. Each type of destination will need to be investigated in turn; the salient and common features could be elicited from the class and summarised (on OHP) and extra examples could be added to the map. An example of each could then be investigated through case studies, either with the whole class or by candidates working individually or in pairs or small groups. The individual case studies could be compiled to form a brochure.

Two destinations must be investigated in detail. If one destination is the local area then candidates should already have the necessary knowledge and could concentrate on investigating the impacts of tourism. Social and environmental impacts could be explored by interviewing people and by research in the local newspaper; economic impacts could be looked at with the help of relevant census and local council information and statistics as well. Class discussion could then form the basis of ideas for sustainable tourism. Candidates could bring all this information together in the form of a newspaper article or PowerPoint presentation. The second destination, which should be a contrasting one, could be investigated by candidates in a similar way, either as a whole class or in pairs or small groups.

For suggestions about *employment opportunities in the travel and tourism industry* see the relevant section in the leisure industry.

4.4.3 Links between Leisure and Tourism

Candidates should know enough by this stage of the course to be able, with some guidance, to identify many of the links between the leisure and tourism industries (a class quiz activity of some sort could be used).

A suitable case study could be used to exemplify the links (candidates should be able to predict some of the links they would expect to find and then check the accuracy of their predictions).

This section could be used to summarise what candidates have learnt in the rest of the course.

4.5   RESOURCES

Useful Websites:

www.toursoc.org.uk
www.abtanet.com
www.visitbritain.com
www.nationaltrust.org.uk
www.wisegrowth.org.uk
www.staruk.org.uk
www.englishtourism.org.uk
www.londontouristboard.com
www.virgin.com
www.britshairways.com
www.ryanair.com
www.stenaline.co.uk
www.thomascook.co.uk
www.jmc-holidays.co.uk
www.firstchoice.co.uk
www.british-museum.ac.uk
www.butlins.co.uk

5 Portfolio Unit 2: Marketing in Leisure and Tourism

5.1 PORTFOLIO EVIDENCE REQUIRED

The assessment evidence required for this unit falls into **two** parts.

For the first part, the candidate needs to choose **one** organisation from the leisure and tourism industry and then investigate the *marketing activities* of that organisation.

The second part of the assessment evidence requires candidates to produce a piece of promotional material that could be used by the chosen organisation.

Evidence can be met by addressing the following criteria:

a   a description of the products and/or services with pricing structures that the organisation offers

Candidates must identify the products and/or services with pricing structures for the chosen organisation (**a1**). Candidates could provide a detailed description of the products and/or services and pricing structures for the chosen organisation (**a2**). Candidates could also analyse the products and/or services provided by the organisation in relation to the pricing structures (**a3**).

b   a description of how the products and services are made available

Candidates need to identify at a basic level how the products and/or services are made available (**b1**). Candidates could describe fully how each organisation makes its products and/or services available (**b2**). As well as a full description, candidates could recommend **one** alternative approach which the organisation could make to improve the availability of its products and/or services (**b3**).

c   a description of the market research activities carried out by the organisation

Candidates should identify the market research activities undertaken by the chosen organisation to meet the needs of different customers (**c1**). Candidates could provide a more detailed description of the market research activities undertaken by the chosen organisation to identify market segments (**c2**). Candidates could carry out their own evaluation of the market research activities undertaken by the organisation in terms of cost effectiveness (**c3**).

d   **a comparison of the organisation's promotional campaign with the campaign of one other leisure and tourism organisation**

Candidates should comment on the promotional materials/marketing mix of both organisations (**d1**). Candidates could suggest other relevant promotional techniques and materials that both organisations could use to promote themselves and their products and/or services (**d2**). Candidates could compare the promotional techniques and materials used by one organisation with those used by the other leisure and tourism organisation (**d3**).

e   **a SWOT (strengths, weaknesses, opportunities, threats) analysis for the chosen organisation**

Candidates need to produce a basic SWOT analysis for the chosen organisation (**e1**). They could produce a detailed SWOT analysis for the chosen organisation (**e2**). They could take this further by analysing the SWOT technique for the organisation identifying areas the organisation needs to consider for future development (**e3**).

For the second part of the assessment evidence candidates need to:

f   **produce an item of promotional material related to the chosen organisation's product or service and aimed at a particular target market.**

Candidates need to produce a piece of promotional material that includes the basic information for an identified target audience (**f1**). If the candidate produces an item of promotional material that shows imagination and is appropriate for a stated target audience then they meet (**f2**). When a candidate demonstrates the ability to plan and produce their promotional materials, stating aims, objectives, target audience and evaluate the finished product they will attain (**f3**).

5.2   BACKGROUND

Candidates need to meet the criteria listed in Section 5.1 – *Portfolio Evidence Required* (**a** – **f**). The more in-depth their investigation/analysis/evaluation the higher their marks. Candidates can meet all of the criteria through the effort made and their written outcome to the set assignment.

This unit introduces candidates to the importance of marketing in the leisure and tourism industries.

Marketing is an important aspect of today's leisure and tourism industries. Marketing is the term used to describe a set of practical tools that organisations use to help ensure they meet their customers' needs. As the leisure and tourism industries are highly competitive and customers are becoming more demanding, any organisation that does not use these tools effectively will not succeed. Candidates will need to investigate the marketing effectiveness of **one** organisation.

Candidates will be introduced to the **three** key marketing tools that organisations use:

- market research;
- target marketing;
- the marketing mix.

Candidates will need to study the need for *market research* in order to make the appropriate decisions within the marketing mix in relation to leisure and tourism.

Candidates will need to understand *target markets* and the relevance of SWOT analyses to marketing decisions made by leisure and tourism organisations. It is important that candidates understand that each organisation has its own approach to marketing its goods and services and that there is no 'right answer' when it comes to deciding on the components of the *marketing mix.*

Candidates also need to be aware of the social, cultural and political environment when considering the *marketing mix* of organisations to see how they meet the needs of the locality. Promotional materials need to be prepared carefully so as not to offend any specific *target market.*

Candidates will undertake work on the promotional element of marketing with a wide use of materials such as brochures, leaflets, posters, videos and advertisements to illustrate elements of their work. However, and most importantly, they will need to understand thoroughly the basic theory of marketing and how it relates to leisure and tourism before they can undertake any practical work.

The Organisation to be studied should be selected carefully to ensure that candidates are able to obtain the relevant information to respond to the criteria of the unit. The organisation could be:

- from leisure and recreation;
- from travel and tourism.

Findings can be presented in a number of ways:

- a report;
- a presentation;
- a display.

If candidates choose to present their findings in the form of a display, supporting evidence will be needed (video, photographs, witness/assessor statements).

5.3   EXEMPLAR CASE STUDY MATERIAL

There is nothing that quite matches the 'real thing' when delivering a vocational subject, i.e. getting candidates out into the industry to experience marketing firsthand. However, timetables don't always allow for regular time-out and so case study material is the next best thing. A number of facilities offer good case study material to work with, e.g. Legoland, Oakwood Park.

Small, bite size, case studies such as 3 and 4 make ideal homework exercises to reinforce/ consolidate what has been taught in class.

5.3.1 Case Study 1: Brendan

Brendan is the manager of a town centre hotel and one of his responsibilities is to advertise the hotel's facilities. He uses a set format when creating his advertisements by asking himself the following questions:

- What do I want the advertisement to say to people and who am I aiming it at?

- Where's the best place to advertise?

- How much will it cost?

- How should I design it – catchy headline, benefits to be taken – AIDA (create *Attention*, promote an *Interest*, motivate the customer to *Desire* the product, enable the customer to take *Action*)?

- What illustrations should I use?

Activity

Based on the format used by Brendan, design an advertisement for your chosen organisation.

5.3.2 Case Study 2: Gary

Gary opened his gym three years ago. After working as a deputy manager of a local authority leisure centre for five years he had decided to 'take the plunge' and start his own business.

Gary, at first, had a 12-station multi-gym and five sets of 'free weights'. As membership increased, he was able to invest in two treadmills, five rowing machines and five exercise bikes. Next year he plans to add a health suite incorporating a sauna, steamroom and sunbeds.

The profit Gary makes looks like this:

PROFIT =   Income generated from subscriptions and fees
             MINUS
             overheads such as rent, wages, fuel bills, and equipment.

Question

Gary receives £34 550 from annual subscriptions, £53 795 from fees and £30 275 from catering. He has to pay £7 650 rent per year for the premises, £32 000 on staff wages, £10 765on heating and electricity and £17 000 on equipment.

How much profit does he make per year?

5.4   SAMPLE ASSIGNMENT

This assignment has been written to cover the needs of all candidates and in the form shown in 5.4.1 could be given to candidates with a target grade of CC or above. Teachers who wish to provide an assignment more suitable for candidates whose target grade is less than CC could remove some or all of the tasks included to produce evidence of levels 2 and/or 3 of the assessment criteria.

5.4.1 Sample Assignment 1

Task 1

Choose **one** organisation from the leisure and tourism industry and investigate the marketing activities of that organisation.

Present your findings in the form of a report that should include the following:

a

- The *name* of the organisation being studied and a *description* of the organisation's location.
- A *list* of the products and/or services offered by the organisation, and their prices. (**a1**)
- *Details* of the products and/or services and their pricing, mentioning discounts, special offers, sales promotions, etc. (**a2**)
- An *analysis* of the products and/or services provided by the organisation in relation to the pricing structures. (**a3**)

b

- A basic *list* of how the organisation makes its products and/or services available. (**b1**)
- A full *description* of how the organisation makes its products and/or services available. (**b2**)
- A suggestion of an *alternative way* the organisation could use to improve the availability of its products and/or services. (**b3**)

c

- A *list* of the methods of market research used by the organisation. (**c1**)
- How does the organisation identify market segments (age, gender, social groups, lifestyle and ethnicity, members and non members, local people and visitors)? (**c2**)
- How has the organisation's recent market research been cost effective? (**c3**)

d

- An outline of the methods the organisation uses to tell its customers about the products and/or services it has to offer (promotional techniques – advertising, direct marketing, public relations, personal selling, displays, sponsorship, demonstrations, sales promotions) and the same again for **one other** leisure and tourism organisation. (**d1**)

- What other promotional techniques would be appropriate for both organisations to use? (**d2**)

- Compare the promotional techniques and materials used by the chosen organisation with those used by the other leisure and tourism organisation. (**d3**)

e

- Carry out a SWOT analysis for the chosen organisation. (basic **e1;** detailed **e2**)

- Analyse the SWOT technique for the chosen organisation and identify areas the organisation needs to consider for future development. (**e3**)

Task 2

Produce an original leaflet, poster, or brochure for the organisation you have studied in Task 1. Your aim is to promote the products and/or services of the chosen organisation.

- Identify your target audience and produce a piece of promotional material. (**f1**)

- Be imaginative. (**f2**)

- Plan and produce your material giving a clear description of the ideas and information that make your promotional material suitable for its target audience. Evaluate your finished piece of promotional material. (**f3**)

5.5   TEACHING ACTIVITIES

Organisations to be studied need to be accessible to the candidates. Therefore, it is useful to work with a local organisation in order to access relevant information, invite speakers, conduct visits etc. A number of large organisations have GNVQ 'packs' available and are happy for groups to visit. Some organisations offer very good support material available at reasonable costs, good case study material is of great value and with that in mind the teaching materials /activities are based around the *Legoland* and *Oakwood Park* case study material.

The assignment has been broken down into **two** main tasks with bullet point indicators highlighting the assessment criteria to be attained. Teachers can, if they prefer, prepare smaller assignments rather than **one** whole project based assignment. The example given is based around the latter – a project based assignment.

Task 1

An investigation into the marketing activities of **one** organisation from the leisure and tourism industry.

Pupils will have acquired the necessary underpinning knowledge and understanding regarding marketing in the leisure and tourism industry. Now it is a case of applying what they know to an actual organisation of their choice, evaluating their investigation and suggesting ways of improving the marketing techniques of the chosen organisation.

Sections **a**, **b** and **e** of Task One look at *The Marketing Mix* (The four Ps – product, place, price, promotion).

Section **c** looks at *Market Research*.

Section **d** looks at *Target Marketing*.

a   Investigate the products and services on offer along with an analysis of the pricing structure – candidates will need to note any special offers available, discounts for particular market segments, sales promotions, etc.

b   Describe how each organisation makes their products and services available.
Candidates will be investigating the promotional materials of their chosen organisation. They need to consider why the techniques have been chosen by the organisation and how they are actually used. They need to suggest other appropriate promotional techniques to gain higher level marks. They could include examples of brochures, leaflets, posters etc. to highlight findings. Candidates need to evaluate the effectiveness of the promotional materials (design, words and images, how they are made available to customers). Suggestions of ways in which they could be made more effective will gain higher level marks (use of improved media coverage e.g. local radio station advertising with a catchy jingle to promote a special offer).

c   Market research. As well as using the case study material, candidates will need to make contact or visit the organisation to find out about the most recent market research conducted.

They need to evaluate the cost effectiveness of the organisation's market research by looking at attendance figures – have they increased as a result? Findings can be recorded in the form of a graph. Candidates need to identify the target marketing used by their chosen organisation.

d **Promotional techniques/campaign.** Candidates can outline promotional campaigns run by their chosen organisations using the following headings: What was the campaign trying to achieve? (Objectives) What was the target market for the campaign? What promotional techniques were used? What promotional materials were used?

e **Swot analysis.** How did the organisation check to see (monitor) that the campaign was working and how did the organisation know if the campaign had been successful?

Task 2

f **Produce an original piece of promotional material.** Encourage candidates to use ICT, be imaginative and original. Teachers will need to gather materials as exemplar for candidates, if candidates have been unable to for themselves. Candidates must understand that their work is to be their own and *on no account be copied.* Time spent brainstorming/planning and exploring ideas, as a group, will be of great benefit to candidates who perhaps lack imagination.

Further Notes for Teachers

Candidates should convey an understanding of the differences between 'products' and 'services', e.g. a sentence or two describing items such as food and drink would meet (**a1**) while one or more paragraphs describing more complex products and services such as guided tours or coaching would meet (**a2/3**). Details of pricing these products and services should include a list of prices with details of discounts, special offers etc.

When describing 'place' candidates should include information such as 'chain of distribution' and 'outlets' used to get products and services to customers. Candidates working towards the higher tiers will need to be allowed the opportunity to consider alternative approaches the organisation could use to distribute their products and services.

Candidates should be encouraged to use an organisation that uses a range of promotional techniques, materials and research methods, but not all those listed in the *What You Need To Learn* section. This way, candidates can be encouraged to ask questions and carry out their own research.

When describing promotional materials, candidates should consider advertisements; brochures and leaflets; merchandising material; videos; press releases; internet sites. They need to understand that the effectiveness of these materials depends on the way they are designed, the words and images they contain and how they are made available to customers.

Candidates will need to produce, for their chosen organisation, an original item of promotional material from the list above (advertisements, brochures and leaflets etc.). They must not simply copy existing material. When preparing candidates for this part of the assessment, consider opportunities for new promotional material such as the launch of a new product or service, the targeting of a new market segment, the re-launch of an existing product or a special event. The material produced *must* be authentic and unique to the candidate, plagiarism between candidates will not be acceptable.

Candidates need to produce a SWOT analysis for their chosen organisation. They should be made aware that strengths and weaknesses refer to the *internal* operation of the organisation, such as range of facilities offered or lack of these, and opportunities and threats are *external* factors, such as closure or opening of a new leisure facility in the area.

5.6 RESOURCES

Legoland – ISBN 1 85338681 2. Publisher LSDA

Oakwood Park – contact Springboard UK's Travel and Tourism Programme
e-mail: (ttp@springboarduk.org.uk)

Heinemann GNVQ Intermediate Leisure and Tourism – Peter Hayward
ISBN 0-435 45596 6

Marketing in Travel and Tourism, V. Middleton, (Butterworth Heinemann, 2000)

The Tourism Education Consultancy offers a wide range of publications – photocopiable resource packs of homework/revision exercises – invaluable.
Tel: 0118 376 9667

Examples of promotional materials can be obtained by writing to a variety of leisure and tourism organisations or visiting local ones. Many organisations have good websites worth visiting.

Visits to the British Travel Trade Show, the World Travel Market or the Recreation Management Exhibition will provide opportunities to collect a variety of promotional leaflets from different sections of the industry. Visits such as these are invaluable in witnessing marketing firsthand.

6   Portfolio Unit 3: Customer Service in Leisure and Tourism

6.1   PORTFOLIO EVIDENCE REQUIRED

The assessment evidence required for this unit falls into **two** parts.

For the first part, the candidate needs to choose a leisure and tourism organisation and then review the customer service it provides by addressing the following assessment criteria:

a   an explanation of customer service activities. The candidate should describe what is meant by 'customer service', identifying the variety of customer service provided by the organisation (**a1**). The candidate could then explain why providing excellent customer service is important to their chosen organisation, and illustrate their explanation with examples (which could be of good or poor customer service) (**a2**). See later in this section for **a3**.

b   how organisations meet the needs of different types of customers, both internal and external. The candidate should describe how the organisation meets the needs of a variety of customers and how it deals with complaints (**b1**). The candidate could elaborate on this to distinguish between the needs of internal and external customers, illustrating his/her description with examples. The candidate could also explain the complaints procedure used by the organisation (**b2**). The candidate could then evaluate the way the organisation meets the needs of all its customers and analyse its complaint procedures (**b3**).

c   benefits to the organisation of effective customer service. The candidate should describe the benefits to the organisation of providing effective customer service (**c1**). The candidate could explain these benefits fully (**c2**). The candidate could then recommend improvements to the organisation's customer service procedures, showing how these would increase the benefits to the organisation (**c3**).

d   identifying records maintained by the organisation to support customer service activities. The candidate should describe (and include) **two** examples of customer service records used by the organisation (**d1**). The candidate could use these, and other, examples to explain how customer service records are used to develop customer service in the organisation (**d2**). The candidate could then suggest other ways in which the organisation could use its existing customer service records to improve customer service in the organisation (**d3**).

If the candidate's work is a thorough and knowledgeable analysis of customer service in the organisation then the candidate has also met **a3**.

For the second part of the assessment evidence the candidate needs to provide a record of:

e   his/her involvement in a variety of customer service situations, including personal presentation and communication skills. The candidate should provide evidence that he/she has communicated clearly with a variety of customers, listening carefully and responding appropriately (**e1**). The candidate could also provide evidence to show that he/she dealt confidently with those customers and has a good standard of personal presentation and good communication skills (**e2**). If the candidate can show that he/she communicated successfully and confidently with those customers, providing a full and effective response, then he/she has also met **e3**.

f   handling a customer complaint. The candidate should describe how he/she handled a customer complaint (**f1**). If the candidate can handle the complaint effectively, following the procedures of the organisation then he/she has also met (**f2**). The candidate could also evaluate his or her own performance in the customer service situations undertaken, including the handling of complaints made by customers (**f3**).

6.2   BACKGROUND

Candidates need to investigate customer service from practical experience as much as possible. Although the basic principles can be taught in the classroom and dealing with customers practised through role-play, candidates really need first-hand experience of providing customer service. They should, at least, *observe* customer service in a leisure and tourism facility and, if at all possible, have some experience of *dealing* with customers in a leisure and tourism facility. Co-ordinating the delivery of this unit with work experience is one obvious way of providing 'hands on' experience. *Welcome Host* training, which can probably be provided by the local Sixth Form or FE college or Tourist Board, is another method of giving candidates some practical experience of customer service in a leisure and tourism setting. There are a number of videos available which deal with customer service (although often from a generic business viewpoint) and a number of television programmes provide example of good – and less good – customer service.

6.2.1 The Assignment

Ideally, each candidate should choose an organisation of which he/she has first-hand experience (probably through work experience or part-time employment). Candidates could also work in pairs or small groups; teachers need to be aware that this can raise a number of problems, including plagiarism, the group member who fails to carry out his or her tasks and problems in deciding what marks to allocate to an individual's work. The whole class could investigate the same organisation but this raises the same problems as those resulting from group investigations, although this may be the pragmatic solution under some circumstances. Single purpose organisations (such as a cinema, football club, branch of a travel agent or historic house) provide the best opportunities for candidates to produce a thorough piece of work since the complexity of the customer service provided by organisations such as leisure centres and theme parks makes it difficult for candidates to produce more than a superficial review. Since candidates will need access to *internal* as well as *external* customers, as well as examples of *customer records*, it is vital that candidates or teachers seek permission for the investigation.

Candidates' evidence of *dealing with customers* needs to be robust. Ideally it should come from a real work situation; if this is not possible then role-plays can be used. In both cases witness statements will be needed and a proforma that covers all the points included in assessment criteria **e1**, **e2**, **e3**, **f1**, **f2** and **f3** would ensure that candidates are not penalised by vague statements. In addition, some objective supporting evidence, such as videos or tape recordings, would be helpful, especially for those candidates who should be able to meet the requirements of **f3**.

6.2.2 The Sample Assignment

This has been written to cover the needs of all candidates and in the form shown in 6.4 could be given to candidates with a target grade of CC or above. Teachers who wish to provide an assignment more suitable for candidates whose target grade is less than CC could remove some or all of the tasks included to produce evidence for levels 2 and/or 3 of the assessment criteria.

6.3   EXEMPLAR CASE STUDY MATERIAL AND ROLE-PLAYS

6.3.1 Case Studies

These need to be based on real examples and there is plenty of suitable material available. Many organisations produce information packs and videos, and the *Legoland* case study is an example of a case study based on such material. Teachers can also collect leaflets and research information from websites, newspapers etc. to compile their own case studies and the *Marwell Zoo* case study is an example of this. Each case study can be used to introduce or allow the candidates to explore a single point or group of related points.

Legoland

(to illustrate 8.2.1 What is customer service?)

Legoland Windsor is a theme park aimed at children aged 12 and under. It is divided into 8 themed areas and has over 50 interactive rides, live shows, building workshops, driving schools and attractions. It also has 8 restaurants and cafes. About 32 million Lego bricks were used to build the models in the park.

The **average party size** at Legoland is 4 people and about half of all parties include children aged 3-5 years. Approximately 75% of all guests are on a day trip and about 2/3 of guests are first-time visitors.

The **Legoland mission** is to '*give children and their families a real-life experience of the Lego core values – creativity, fun, development, play and learning – in a unique environment where the child is the hero*'. To help to achieve this all Legoland employees have to follow the **Brilliant Guest Service training module** (which supports an NVQ Customer Service at Level 2). This is designed '*to ensure that guests are delighted first time, every time and always.*'

What does Legoland consider to be Brilliant Guest Service?

- The guest coming first every time
- Meeting and exceeding guests' needs and expectations
- Getting the details right – first time and every time
- Making children HEROES every day

Objectives of the brilliant Guest Service training module include:

- Understanding the importance of Brilliant Guest Service at Legoland
- Identifying the key communication processed involved when dealing with guests
- Investigating ways of developing your Guest Service skills
- Identifying how to make a positive impression
- Understanding the importance of presenting accurate information to guests and how to use reference materials

Legoland employees are expected to recognise that GUESTS

- are the most important people – in person or on the telephone
- do not depend on us – we depend on them
- are not an interruption of our work – they are the purpose of it
- are not outsiders – they are human beings with feelings, emotions, likes and dislikes
- are not people to argue with – no one ever won an argument with a guest
- are individuals with individual requirements – it is up to us to meet and exceed their needs
- are our reason for being here – our purpose is to delight them with our hospitality

Is it surprising that *Legoland* was awarded **Best Children's Attraction** in **2000**?

Go for Gold!
Be the Ultimate
Make Someone a Hero Today!

Ways in which The Legoland Case Study could be used:

- To introduce or summarise the concept of customer service.

- To introduce or summarise the concept that, to be effective, customer service should aim to be excellent.

- To exemplify good customer service.

- To demonstrate the importance of training.

- As a document to use as a basis for discussion.

- With a work sheet, to elucidate and reinforce the main points of 8.2.1.

- As a basis for comparison with another organisation.

- As a springboard for research.

- As part of the preparation for a visit, to *Legoland* or a similar attraction.

Sources of Further Information

Discover Legoland Windsor piece by piece
Ed. Jackie Mace
Pub. LSDA (tel. 020 7962 1066)
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Marwell Zoo

(to illustrate 8.2.2 Different types of customer)

Marwell Zoological Park

Thrilling encounters with around 1000 wild animals in 100 acres of beautiful Hampshire parkland. All year, every year, Marwell's unique magic casts its enchanting spell on old and young alike.

Big cats, red pandas, zebras, antelopes, monkeys, hippos, rhinos, meerkats, lemurs, giraffes and penguins… and other endangered species.

For individuals, families and groups, a visit to Marwell means the freedom to roam at will around the animal enclosures, all designed to reflect as closely as possible the animals' natural habitat. If you don't want to walk you could board our free train (**Marwell's Wonderful Railway**), complete with commentary or use our free **Road Train**) which operates around the park, stopping frequently.

Don't miss the **Encounter Village** where visitors can make friends with domesticated animals or our **Family Animal Handling Sessions** or one of our **Touch Tables**. At Christmas, visit our famous **Winter Wonderland** which includes visit to and presents from

Father Christmas, mulled wine and mince pies for adults, Santa's live reindeer, seasonal entertainment and craft stalls for the price of your zoo entry.

Our facilities also include free parking, the **Tree Tops Restaurant**, **picnic/play area**, the **Ark Gift Shop**, **crazy golf** and an **Adventure Playground**. To help you enjoy your visit wheelchairs and pushchairs are available and we have plenty of toilets and nursing mother facilities.

Our services for the disabled include: free park entrance for vehicles with a disabled sticker; all areas easily accessible; special toilets; special group rates; special tours for visually impaired visitors.

Groups: special discounts for groups, including disabled groups; guided tours by arrangements; 'All-in Specials' with Cream Teas.

School parties: special rates, educational packs, programme of activities in our Education Centre

Functions: Tree Tops Restaurant and bar available for hire (out of zoo hours).

EXPERIENCE CONSERVATION IN ACTION
A RARE EXPERIENCE!

Ways in which The Marwell Zoo Case Study could be used:

- To introduce or summarise the concept of different types of customers.
- To introduce or summarise the concept that different types of customers have differing needs.
- To exemplify how good customer service provides for different specific customer needs.
- As a document to use as a basis for discussion.
- With a work sheet, to elucidate and reinforce the main points of 8.2.2.
- To introduce the ideas explored in 8.3.3 External and internal customers.
- As a basis for comparison with another organisation.
- As a springboard for research.
- As part of the preparation for a visit, to Marwell or a similar zoo.

Sources of Further Information

Marwell Zoo
Colden Common
near Winchester
Hampshire
SO21 1JH
Tel. 01962 777407
Website: (www.marwell.org.uk)

6.3.2 Role-plays

These need to be as realistic as possible, while at the same time being accessible to the candidate. Choosing the same setting for all the role-plays simplifies matters considerably for the teacher and allows candidates the opportunity to become familiar with the situation. Consequently, the setting needs to be one that allows for plenty of possible situations, such as the reception or customer service desk of either a local Tourist Information office or a large leisure/community centre.

If possible, a corner of the classroom should be set up for the chosen situation; a small, spare office would be ideal. The minimum provision would be a desk, equipped with relevant stationery, with a chair for the customer service staff member and shelving/racks for all the necessary leaflets, brochures and reference books, as well as a video camera positioned so as to record all the customer service role-plays. A working telephone would extend the possible range of role-play situations, as would a networked computer. Candidates should be given an opportunity to familiarise themselves with the role-play situation.

Contact with customers may be direct, such as face-to-face, or indirect, such as by letter. The candidate has to provide evidence of his/her involvement with 'a variety of customers' (**e**) and with a customer complaint (**f**); there is no stipulated number of situations. So **three** examples would appear to be the absolute minimum – one face-to-face, one in writing and one on the telephone, with **one** of these involving a complaint. More than three examples would be preferable. The situations that could be encountered are outlined in 8.2.1 *What is customer service?* Revising 8.2.6 *Communicating with customers* before beginning the role-plays would be useful.

Contact in Writing

The teacher will need to provide each candidate with a different letter to answer. The candidates' replies should be correctly laid out, with no spelling or other mistakes, preferably word-processed and give a suitable response to the original letter. Liaison with English language staff might be helpful. A letter provides a suitable vehicle for a detailed inquiry; researching the answer to this will help to familiarise the candidate with the information available in the role-play situation.

The letter could:

- be written on behalf of a group of some kind (family, club, school etc);
- mention the specific need of one member of the group;
- ask questions about a particular activity.

Contact by Telephone

The teacher will need to arrange for someone to telephone the candidate; if possible, it should be the same person who telephones all the candidates. Again, liaising with English language staff could be useful. The telephone call should be answered promptly and appropriately and candidates should be encouraged to make a note of relevant details (a suitable message pad could be provided). Candidates should end the call in a suitable manner.

The telephone caller could:

- ask follow-up questions to those in the letter;
- ask to speak to a member of staff who wasn't there;
- leave a message to be passed on to that member of staff.

Face-to-Face Contact

This could be a suitable point at which to revise the importance of 8.2.6 *Personal presentation*. It helps with the reality of the situation if the candidate does not know the 'customer'. Candidates may need to be reminded how to greet customers and how to end the conversation.

The customer could:

- make a booking;
- buy an item;
- ask for advice.

Customer with a Complaint

Any one of the situations mentioned above could involve a customer with a complaint. Candidates will need to have considered 8.2.7 *Handling complaints* and the role-play situation should have a written procedure for handling complaints. Candidates should have been familiarised with this and a written copy should be available in the role-play situation. It is worth pointing out that a customer with a complaint is not automatically also an angry customer! Complaints should be realistic.

Evidencing Role-Plays

Evidence could include:

- letter and reply;
- notes made during telephone conversation;
- tape recording of telephone conversation;
- witness statement from telephone caller/customer;
- witness statement by observer;
- video (candidates could make a statement that begins 'In the video you can see that I…).

Note:

- Outlines/proformas, based on the details mentioned in the specifications ensure that witness statements are sufficiently detailed.
- Videos must be indexed and referenced.
- See the relevant comments in 6.2.

6.4   SAMPLE ASSIGNMENT

To provide the assessment evidence required for this portfolio unit you will need to produce **two** reports. For **Report A**, you will have to investigate and review the customer service provided by a leisure and tourism organisation. For **Report B**, you will need to provide evidence that shows how you dealt with a variety of customers.

6.4.1   Report A – Investigating Customer Service in a Leisure and Tourism Organisation

- Choose a leisure and tourism organisation, making sure that you will be able to investigate its customer service.
- Check your choice with your teacher.

Task 1

- Write a brief description of your chosen organisation, as an introduction to Report A.
- State what is meant by 'customer service'.
- Describe the ways in which your chosen organisation gives customer service. (**a1**)
- Explain why it is important to your chosen organisation that all staff give good customer service and use examples from your chosen organisation to illustrate your explanation. (**a2**)

Task 2

- Describe the varied needs of the customers of your chosen organisation.
- Describe how your chosen organisation meets the needs of its customers.
- Describe how your chosen organisation deals with complaints. (**b1)**
- Make sure that in the above you have described the needs of both *internal* and *external* customers, and that you have used *examples* from your chosen organisation to illustrate your description.
- Explain the complaints procedure used in your chosen organisation. (**b2**)
- Evaluate the ways your chosen organisation meets the needs of all its customers.
- Analyse the complaints procedure used in your chosen organisation. (**b3**)

Task 3

- Describe the benefits effective customer service gives your chosen organisation. (**c1**)

- Explain fully the benefits of effective customer service procedures to your chosen organisation. (**c2)**

- Recommend improvements to the customer service procedures of your chosen organisation that would increase the benefits to it. (**c3**)

Task 4

- Describe **two** examples of customer service records used by your chosen organisation, including an example of each if possible. (**d1**)

- Explain, with the aid of examples, how customer service records are used to develop customer service in your chosen organisation. (**d2**)

- Suggest alternative ways in which your chosen organisation could use its existing customer service records to improve its customer service provision. (**d3**)

Throughout Report A

- Produce a thorough and knowledgeable analysis of customer service in your chosen organisation. (**a3)**

6.4.2 Report B – Providing Customer Service in Leisure and Tourism

- Provide service to a number of different customers, including at least **one** customer with a complaint. This may be in your chosen organisation, or through role-play or otherwise.

- Make sure that there are records of the customer service you have provided; these may be in the form of notes, witness statements, video or tape recordings.

- Check with your teacher that you have sufficient evidence.

Task 1

Provide evidence to show that you can:

- communicate clearly with a variety of customers, listening carefully and responding appropriately. (**e1**)

- deal confidently with a variety of customers, demonstrating a good standard of personal presentation and good communication skills. (**e2**)

- communicate successfully and confidently with customers, listening carefully and providing a full and effective response. (**e3**)

- handle a customer complaint.

Task 2

- Describe how you handled a customer complaint. (**f1**)

- Show how you handled a customer complaint effectively, following the procedures of the organisation concerned. (**f2**)

Conclusion to Report B

- Evaluate your performance in the customer service situations you have taken part in, including handling complaints made by customers. (**f3**)

6.5   TEACHING ACTIVITIES

Do give candidates a copy of the specification.

This unit could be *introduced* with a class discussion of the customer service the candidates have recently received (note the situations described on the board). This could lead into a discussion of *what is good customer service* and why it is important.

Possible teaching activities include:

- working in groups, candidates could prepare posters that could be used to remind customer service staff in a (specific) leisure and tourism facility about the importance of providing good customer service. These could be used as a classroom display for the rest of the unit or to begin to set the scene for role-plays (see 6.3);

- candidates could then be asked to write a definition of customer service (with one available on OHP);

- the situations noted on the board could be used to illustrate the range of different situations in which customer service is provided (with a comprehensive list available on OHP);

- a visit to a leisure and tourism facility to experience and observe customer service (with some input from the management if possible) would be a good idea; possible suggestions include the group making a booking for a class lunch, ten pin bowling or a visitor attraction); as an alternative a case study, such as the one on *Legoland* (see 6.3) could be used.

Different types of customer could be identified through a brainstorming session; their specific needs could be suggested by candidates or matched through a domino-style game. It is important to avoid stereotyping – not all people with a disability are in a wheelchair, for example. Customer needs could be further explored through video, case study (such as the study of *Marwell Zoo* in 6.3) or through a visit. Candidates could be asked to take on the role of a customer with a specific need and then report back to the class on their experiences. Leaflets etc. can be used, with a scoring system, to compare how well different facilities meet different customer needs.

All the customers mentioned so far are *external* customers. Candidates need to be introduced to the concept of *internal* customers. They could return to the visits and case studies investigated earlier and identify the internal customers (perhaps with the aid of a worksheet).

The *benefits of customer service* could be introduced by reference to the posters produced earlier. A consequences-style game could be played to demonstrate the benefits excellent customer service brings to leisure and tourism organisations. Candidates could devise a dialogue between a new customer services manager and his/her boss about the benefits of improving internal customer service, or act out a short play where poor service to an external customer was the result of poor service by an internal customer.

Keeping customer records can be investigated initially by the candidates completing a variety of examples. (Many are in the public domain and can be collected by the teacher; there are plenty of examples in textbooks and information packs and on the Internet and many facilities are willing to provide examples if asked). Candidates could then consider how those records could be kept and how they could be updated. The importance of accuracy and confidentiality could be explored through discussion or short scenarios, for which candidates could provide the 'What should have happened' version.

The importance of *personal presentation* in customer service could be introduced through video, role-play or discussion. Candidates could investigate, through case studies, the standards of personal presentation expected in various leisure and tourism facilities and comment on their importance. They could design a 'reminder' poster, intended to be seen by customer service staff just before they go on duty, for a specific facility (which could be the organisation they are investigating for the first part of their assessment).

When delivering *communicating with customers* liaison with the English language staff would be helpful. A good video is probably the best way of demonstrating how to communicate with customers. Candidates will need to practise communicating with customers; writing lists of 'Do's and Don'ts' for each type of communication would help to remind them of what to do. Face-to-face communication works better with a few props and some form of observation to add the necessary degree of formality. Communicating by telephone could be with the aid of the school telephone system, using mobiles or even using toy telephones. Writing letters could be practised with the aid of computers and using e-mails is an obvious extension of this. In all cases candidates could alternate the roles of customer and staff. Candidates require some feedback on their performance; a supportive group of candidates could do this for each other but in most cases the teacher will have to do this. If a classroom assistant or other adult is available he/she could also fulfil this role. Using the same proforma that will be used for the witness statements in the assessment is a good idea and provides an opportunity to pilot the format and content. A bank of letters and situation cards could be provided for the candidates to work from; each situation will probably need to be resourced with information leaflets etc.

Handling complaints can be approached in much the same way as communicating with customers, after the candidates have considered how complaints should be dealt with. They could write a set of 'Golden Rules' for dealing with customer complaints. It is possible to obtain from some organisations a copy of their procedures and candidates could usefully compare these with the 'Golden Rules' that they wrote.

The portfolio work is probably best managed by being broken into a number of small tasks, each of which has its own deadline. In this way candidates can be prevented from falling behind with their work and can also have the benefit of feedback on the preliminary drafts of their work.