

SKAB239

Scope and develop the concept and purpose of an expedition



Overview

Expedition management and co-ordination depends on careful planning and organisation. The first stage in this process is having a very clear agreement amongst all those involved on what the expedition is about and in defining its aims and objectives. Sometimes the people who are proposing the expedition will be able to give a very clear brief. At other times quite a lot of research and/or negotiation will be necessary to clarify exactly what can be achieved. In either case, it will be important to identify the main requirements for the expedition, evaluate how feasible these proposed requirements are and to negotiate and agree a proposal before further planning takes place.

The unit is recommended for anyone proposing an expedition and exploring its feasibility.

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Performance criteria

You must be able to:

- P1 collect relevant information to assist your planning
- P2 ensure the expedition's concept and purpose:
 - P2.1 provide clear objectives, expressed in a form that is suitable for discussion with others
 - P2.2 reflect the sponsor/organisation's strategy and core values
 - P2.3 can be realised using available time and resources
 - P2.4 match the needs, competencies and interests of potential leaders and participants
 - P2.5 are sufficiently flexible to allow for alternative courses of action
- P3 evaluate the expedition's requirements in terms of:
 - P3.1 stakeholders
 - P3.2 goals
 - P3.3 intended market
 - P3.4 financial goals
 - P3.5 broader context in which the expedition is taking place
 - P3.6 timing
 - P3.7 location
 - P3.8 proposed numbers involved
 - P3.9 key competencies and qualifications
 - P3.10 special requirements
 - P3.11 available resources
 - P3.12 critical success factors
- P4 identify and analyse:
 - P4.1 information relating to similar expeditions
 - P4.2 health and safety implications
 - P4.3 legal and regulatory requirements
 - P4.4 financial viability
 - P4.5 the organisation's operational policies and procedures
- P5 evaluate and report on the feasibility of the proposed expedition

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 explain why it is important to research and negotiate the scope of an expedition and the possible consequences of not doing so correctly
- K2 list the main sources and types of information that can be used to scope an expedition and their implications for example, for: travel and transport, food and accommodation, statutory and legal requirements (in the uk and/or overseas)
- K3 describe the main methods you can use to organise, analyse and make use of this information and compare the strengths and weaknesses of these methods
- K4 describe the main processes involved in establishing the financial viability of an expedition
- K5 describe the methods you could use to access information about similar expeditions and compare strengths and weaknesses of these methods
- K6 describe the main processes and skills involved in negotiating the requirements and scope for an expedition
- K7 explain why it is important to have agreement with stakeholders and relevant colleagues
- K8 explain why it is important to record the outcomes of negotiations

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 describe the main types of expeditions that occur in your sector
- K10 describe the typical types of stakeholders for an expedition in your sector and explain what their interests in the expedition may be
- K11 describe typical requirements for, and scope of, expeditions in your sector
- K12 list the legal and regulatory requirements that affect expeditions in your sector and describe their main implications for expedition feasibility

You need to know and understand:

Context specific knowledge and understanding

- K13 explain the policies and procedures of your organisation and other stakeholder organisations with whom you are involved
- K14 describe the extent of your own responsibilities for researching and negotiating scope and requirements for expeditions
- K15 describe how your role relates to the roles of others in your organisation
- K16 describe the main responsibilities of colleagues with whom you work when scoping an expedition

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Additional Information

Skills

Listed below are the main generic 'skills' which need to be applied in this unit. These skills are explicit/implicit in the detailed content of the unit and are listed here as additional information.

1. Researching
2. Organising information
3. Analysing
4. Communication
5. Evaluating
6. Negotiating
7. Reporting

Behaviours

1. You demonstrate a clear understanding of different stakeholders and their real and perceived needs
2. You use cost-effective, time-effective and ethical means to gather, store and retrieve information
3. You check the validity and reliability of information
4. You prioritise objectives and plan work to make the best use of time and resources
5. You focus personal attention on specific details that are critical to achieving successful results
6. You present information clearly, concisely, accurately and in ways that promote understanding
7. You reflect regularly on your own and others' experiences, and use these to inform future action
8. You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
9. You say no to unreasonable requests
10. You present ideas and arguments convincingly and in ways that strike a chord with people
11. You work towards win-win solutions

Links to other NOS

This unit links to SKAB241 Monitor evaluate and report on an expedition, SKAB22 Design outdoor education programmes and SKAB23 Design outdoor development training programmes in the suite of National Occupational Standards for Expedition Leadership and Management

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Developed by	SkillsActive
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Version number	1
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Date approved	January 2009
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Indicative review date	January 2014
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Validity	Current
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Status	Original
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Originating organisation	SkillsActive
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Original URN	SA44NB239
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Relevant occupations	Associate Professionals and Technical Occupations; Leisure, travel and tourism; Sport, leisure and recreation; Sports and Fitness Occupations
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Suite	Expedition Leadership and Management
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Key words	scope, develop, concept, purpose, expedition
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