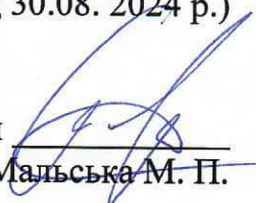


МІНІСТЕРСТВО ОСВІТИ І НАУКИ УКРАЇНИ
Львівський національний університет імені Івана Франка
Факультет географічний
Кафедра туризму

Затверджено
На засіданні кафедри туризму
Географічного факультету
Львівського національного університету
імені Івана Франка
(протокол № 1 від 30.08. 2024 р.)

Завідувач кафедри 
проф. Мальська М. П.

СИЛАБУС
з навчальної дисципліни «Планування діяльності туристичних установ (*англ
мова*)»,

що викладається в межах ОПП «Туристична діяльність»
другого (магістерського) рівня вищої освіти для здобувачів спеціальності
242 «Туризм і рекреація»

Львів 2024 р.

Name of the course	" <u>Tourism enterprise activity planning</u> "
Course teaching address	Lviv, 41 Doroshenko str
The faculty and department under which the discipline is established	Faculty of Geography, Department of Tourism
Field of knowledge, code and name of specialty	Field of knowledge 24 Service sector, specialty 242 "Tourism @ Recreation"
Course teachers	Oresta Bordun, PhD, Associate Professor, Associate Professor of the Department of Tourism
Contact information of teachers	oresta.bordun@lnu.edu.ua, https://geography.lnu.edu.ua/en/employee/bordun-oresta , Lviv, 41 Doroshenko str, office 4
Consultations	Consultations on the day of lectures/practical classes (by prior arrangement). On-line consultations through ms teams are also possible. To agree on the time of consultations, you should write to the e-mail of the teacher or call.
Course page	https://geography.lnu.edu.ua/course/planuvannia-diial-nisti-turystychnykh-ustanov-anh
Information about the course	The academic discipline <u>Tourism enterprise activity planning</u> ” recommended for students of specialty 242 "Tourism @ Recreation" of educational program “Tourism activity” and “International tourism” of the second (master) level which is taught in second year in the 1 semester in the amount of 3 credits (according to the European Credit Transfer System ECTS).
A brief summary of the course	The discipline " <u>Tourism enterprise activity planning</u> " is a additional discipline for the educational program master in " Tourism @ recreation " but it is an important component of Tourism activity. The content of the course: <ul style="list-style-type: none"> - to learn the essence of planning and business planning; - to distinguish the features of different types of investment projects: startup, scale up, improvement; - to master key techniques of market analysis; - to master the technology of a business plan development; - to master the technology of developing a financial model for a business plan; - to learn the main principles and to master the technology of business plan pitching
Purpose and objectives of the course	The purpose of the course is to form a system of theoretical knowledge and applied skills in the process of tourism enterprise activity planning The ability to solve complex specialized tasks and practical problems in the field of public management and administration or in the learning process, which involves the application of theories and scientific methods and is characterized by complexity and uncertainty of conditions.
Literature for studying the discipline	Basic literature 1. Bordun O. Tourism enterprise activity planning. Methodological guidelines on academic discipline which is taught within the educational professional program "Tourism activity" and “International tourism” of the second (master's) level of higher education for applicants of specialty 242 "Tourism @ Recreation". – Lviv, 2024, 34 p. https://geography.lnu.edu.ua/wp-content/uploads/2024/03/Bordun-tourism-planning_english-242-master-2024.pdf 2. Бордун О. Втрати та напрями порятунку туристичного бізнесу України в умовах війни /Шевчук Віра, Монастирський Володимир, Лучка Ольга Вісник

	<p>Львівського університету. Серія економічна. 2022. Випуск 62, Р. 178–196 (<i>Index Copernicus</i>)</p> <p>3. Бордун О. Ю. Стратегії міжнародних готельних мереж та детермінанти планування їх розвитку в Україні / О. Ю. Бордун., В. Р. Шевчук, // Економічний аналіз. Західноукраїнський національний університет. Тернопіль. – 2020. – том 30 №3. – С. 190-196. (DOI: http://dx.doi.org/10.35774/econa2020.03.190). (<i>Index Copernicus</i>)</p> <p>4. Бордун О.Ю. Особливості оцінювання збалансованого розвитку готельної індустрії України в умовах коронавірусної пандемії / В. Р. Шевчук, О. Ю. Бордун // Вісник Львівського університету. Серія економічна. ЛНУ імені Івана Франка. Львів. – 2020. – №59. – С. 119-130. (DOI: http://dx.doi.org/10.30970/ves.2020.59.0.5912). (<i>Index Copernicus</i>)</p> <p>5. Мальська М.П., Бордун О.Ю. Планування туристичної діяльності Підручник.– К.: Знання, 2010.– 310 с.</p> <p>6. Мальська М.П., Бордун О.Ю. Організація та планування туристичної діяльності: теорія та практика Підручник. – К.: Центр учбової літератури, 2012.– 346 с</p> <p>7. Prischepa N. P. Business planning: text-book / N. P. Prischepa. – Luhansk: Publishing House of the SE “LNU of Taras Shevchenko”, 2012. – 121 p.</p> <p>8. Vinogradov, M., Panin, Z., Larionov, A., Vasilyev, L. Business Planning in the Hospitality Industry: Tutorial, 4th ed., M.: Publishing and Trading Corporation «Dashkov and K°», 2013. 280 p.</p> <p>9. Tourism Business Planning. A Workbook. – 2008, 93 p.</p> <p>Additional literature</p> <p>10. Gerald Schwetje, Sam Vaseghi. The Business Plan How to Win Your Investors’ Confidence Hamburger Beratungs-Kontor GmbH & Co. KG, 2007, 177p.</p> <p>11. Business Planning for Sustainable Tourism / Chapter 6 [https://www.seagrant.umaine.edu/files/pdf.../07RG6.pdf]</p> <p>12. Strategic planning for sustainable tourism development in Poland [https://depot.ceon.pl.../Strategic%20planning%20for%20su]</p> <p>13. Strategic planning in the context of sustainable tourism development [https://cyberleninka.ru/article/n/strategic-planning-in-the-context-of-sustainable-tourism-development]</p> <p>14. Indicators of Sustainable Development for Tourism Destinations A Guidebook. - Copyright © 2004 World Tourism Organization Calle Capitán Haya, 42 28020 Madrid, Spain.</p> <p>15. Kotlyk A. Business planning [Electronic resource] // Website of PNS of S. Kuznets KhNUE. – Access mode: https://pns.hneu.edu.ua/course/view.php?id=9156.</p> <p>16. Syllabus of the academic discipline "Planning the Activity of the Enterprise" for students of training direction 6.030601 "Management" of all forms of study / compiled by T. Lepeyko, O. Mazorenko. – Kh. : Publishing House of S. Kuznets KhNUE, 2014. – 31 p. (English)</p>
The scope of the course	16 hours of lectures, 8 hours of practical classes and 58 hours of independent work
Expected learning outcomes	<p>As a result of studying this course, the student should:</p> <p>to know: methodological foundations of planning,</p> <ul style="list-style-type: none"> - laws and principles of planning, - organizational form and structure of certain types of planning, information and software, - evaluation of the effectiveness of the developed plans, - organizing planning work at the enterprise, - business planning <p>be able to: to organize the company planning using a variety of means and methods of planning;</p> <ul style="list-style-type: none"> - to plan different activities, sales planning different type of tourist products; - to develop a production program; - to determine the need for staff for planning the growth of labor productivity at the tourist enterprise; - to plan production costs and sales; - to plan revenues, profitability, financial condition;

	<p>to evaluate and predict the technical and economic and social development;</p> <ul style="list-style-type: none"> - to carry out current control and analysis of plans. 																																																	
Keywords	Planning, business planning, business plan, startup, business model, financial model																																																	
Course format	Full-time																																																	
Topics	The scheme of the " <u>Tourism enterprise activity planning</u> " course is presented below in tabular form																																																	
Form of final control	credit at the end of the semester																																																	
Prerequisites	To study the course, students need basic knowledge of tourism, tourism management, tourism economy, Intermediate English skills, and geospatial orientation.																																																	
Teaching methods and techniques that will be used during the teaching of the course	<p>Presentation, lectures, guest lectures, discussion, case-study, work-shop.</p> <p>Lectures:</p> <p>conducting lectures; explanation and giving examples from the activities of enterprises according to the topics of the lectures; discussion, conversation, illustration, demonstration.</p> <p>Exercises:</p> <p>Presentation, answer, test survey, discussion, case-study, work-shop.</p>																																																	
Necessary equipment	To study the course, it is enough to have commonly used programs such as Microsoft Office Word, Microsoft Office Excel, Microsoft Office Power Point																																																	
Evaluation criteria (separately for each type of educational activity)	<p>The assessment is carried out on a 100-point scale. Points are awarded according to the following ratio:</p> <ul style="list-style-type: none"> • exercises: maximum number of points 50 • module control: maximum number of points 20 • Summary and defenses business plan: maximum number of points 30 <p>Final maximum number of points 100</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th colspan="8">Ongoing testing and independent work</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>T1</td> <td>T2</td> <td>T3</td> <td>T4</td> <td>T5</td> <td>T6</td> <td>T7</td> <td>Ind. Project</td> <td rowspan="2">100</td> </tr> <tr> <td>10</td> <td>10</td> <td>10</td> <td>10</td> <td>10</td> <td>10</td> <td>10</td> <td>30</td> </tr> </tbody> </table> <p style="text-align: center;">Rating scale: university, national and ECTS</p> <table border="1" style="margin-left: auto; margin-right: auto;"> <thead> <tr> <th rowspan="2">The sum of points for all types of educational activity</th> <th rowspan="2">ECTS</th> <th>Evaluation on a national scale</th> </tr> <tr> <th>For an exam, course project, practice</th> </tr> </thead> <tbody> <tr> <td>90 – 100</td> <td>A</td> <td>excellent</td> </tr> <tr> <td>81-89</td> <td>B</td> <td rowspan="2">good</td> </tr> <tr> <td>71-80</td> <td>C</td> </tr> <tr> <td>61-70</td> <td>D</td> <td rowspan="2">satisfactory</td> </tr> <tr> <td>51-60</td> <td>E</td> </tr> <tr> <td>21-50</td> <td>FX</td> <td>unsatisfactory</td> </tr> <tr> <td>0-20</td> <td>F</td> <td>unsatisfactory (non-transferable)</td> </tr> </tbody> </table>	Ongoing testing and independent work								Total	T1	T2	T3	T4	T5	T6	T7	Ind. Project	100	10	10	10	10	10	10	10	30	The sum of points for all types of educational activity	ECTS	Evaluation on a national scale	For an exam, course project, practice	90 – 100	A	excellent	81-89	B	good	71-80	C	61-70	D	satisfactory	51-60	E	21-50	FX	unsatisfactory	0-20	F	unsatisfactory (non-transferable)
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Questions for self-control	<ol style="list-style-type: none"> 1. What is planning and plan? 2. The role and place of planning in managing an enterprise 3. How and why do managers plan? 4. What types of plans do managers use? 5. What are some useful planning tools and techniques? 6. What are the stages of the planning process? 7. Who is involved in the planning process? 8. Explain different kinds of planning. 9. What are the object and subject of planning? 10. Where do you go with strategic planning? 11. What is business/action/operational planning? 12. Does it matter whether you are planning for an organisation or planning for a project? 13. Explain the most popular planning tools and techniques. 14. What are the factors influencing the form of the planning choice? 15. Explain the importance of the strategic business plan. 16. Describe sales and operations planning in terms of its purpose, components, and frequency. 17. Principles of planning. 18. Methods of planning. 19. Benefits of planning. 20. Identify social, legal, environmental, economic, and political realities of the market. 21. Meaning and objectives of financial planning. 22. Financial planning process. 23. Tools and techniques for preparing a financial plan. 24. Marketing plan. 25. Determination of sources, conditions and developing the project financing schedule. 26. Meaning and importance of budgeting. 27. Calculation of costs, revenue and investments. 28. Organizational structure and staffing of the project. 29. Project team motivation. 30. Staff requirements, job descriptions. 31. Personnel recruitment and training plan
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Week	Topic, plan, short theses	Form of activity (Lectures, exercises)	Literature
Modul 1. <i>The theoretical basis of business planning</i>			
1	Topic 1. General concepts, methodical grounding of a planning. Business-planning in tourism. <ol style="list-style-type: none"> 1. The definition of planning 2. The role and place of planning in managing an enterprise. 3. The essence of planning and hierarchy of planning. 4. Principles of planning. 5. Methods of planning. 6. Benefits of planning. 	Lecture (2 hours)	1, 5, 6, 7, 8, 10, 15
3	Topic 2. Characteristics the branch in which the project is realized <ol style="list-style-type: none"> 1. Identify social, legal, environmental, economic, and political realities of the market. 	Lecture (2 hours)	1, 2, 3, 4, 5, 6

	2. Detailed information on travel industry trends, demographics, visitor spending habits, means of transportation and destination is readily available		
4	<p>Topic 2. Characteristics the branch in which the project is realized.</p> <ol style="list-style-type: none"> Determining the market size and market price. Consumer profile. Questionnaire. Factors impacting demand. Legislative regulation of the market. Competitive analysis. Market infrastructure 	Exercise (2 hours): Group discussion of the topics of lecture: to identify social, legal, environmental, economic, and political realities that may have an impact on your business.	1, 2, 3, 4, 5, 6
5	<p>Topic 3. Description of the product</p> <ol style="list-style-type: none"> Main idea of your product. What are the selling features of your product? (Consider bundling, luxury and standard packages, flexible itineraries, vouchers and coupons, etc.) Is the product passive or participatory? 	Lecture (2 hours)	1, 2, 3, 4, 5, 6, 9
6	<p>Topic 3. Description of the product. Placement of the facility of business. Strategy of marketing</p> <ol style="list-style-type: none"> What exactly are the products and/or services that your business is going to provide? (Describe in detail the new products/services.) Describe your business goals What results do you expect to achieve based on your goals? (Identify business objectives in short and longer term.) 	independent work: searching of your place for business	1, 2, 3, 4, 5, 6, 9
7	<p>Topic 4. Profile of your target market</p> <ol style="list-style-type: none"> Identify the type of visitors you will serve. Who are they are (age, family types, income, marital status, education and lifestyle patterns)? 	Lecture (2 hours)	1, 2, 3, 4, 5, 6, 9
8	<p>Topic 4. Profile of your target market</p> <p>Analise profile of your tourist/customer</p>	Exercise (2 hours): Workshop: present profile of your tourist/customer	1, 2, 3, 4, 5, 6, 9
Modul 2. Features of business planning at the tourism enterprise			
9	<p>Topic 5. Placement of the facility of business.</p> <ol style="list-style-type: none"> Determination of the need for premises, equipment, transport. Determination of the need for components, materials, energy, characteristics and contact details of suppliers, availability of contracts. Organizational and legal form of project implementation. Taxation and accounting system. 	Lecture (2 hours)	1, 2, 3, 5, 6, 9, 11, 12, 13
10	<p>Topic 5. Placement of the facility of business.</p>	Workshop (2 hours): group discussion of the topics of lecture: Team building game. Development and	1, 2, 3, 5, 6, 9, 11, 12, 13

		presentation of business ideas	
11	Topic 6. Finance plan 1. Meaning and objectives of financial planning. 2. Financial planning process. 3. Tools and techniques for preparing a financial plan. 4. Meaning and importance of budgeting.	Lecture (2 hours)	1, 2, 3, 4, 5, 6, 8, 9, 15
12	Topic 6. Finance plan 1. Determination of sources, conditions and developing the project financing schedule. 2. Calculation of costs, revenue and investments. 3. Calculation of project performance indicators.	Exercise (2 hours): Workshop: present your own financial plan	1, 2, 3, 4, 5, 6, 8, 9, 15
13	Topic 7. Management of business project realization 1. Assessment of the ability of management to lead the project. Your CV. 2. Selecting a mode of operation. 3. Organizational structure and staffing of the project. 4. Project team motivation. 5. Staff requirements, job descriptions. 6. Personnel recruitment and training plan	Lecture (2 hours)	1, 2, 5, 6, 9
14	Topic 7. Management of business project realization	independent work	1, 2, 5, 6, 9
15	Topic 8. Business plan pitching Executive summary of the project. Business plan formatting. Business plan pitching.	Lecture (2 hours) defending of the individual research project	1, 2, 5, 6, 9, 15