



**UNIVERSIDAD DE SONORA**  
**Central Regional Unit**  
**Economic Administrative Science Divisions**  
**Accounting Department**  
**BACHELOR OF TOURISM**

<b>Course:</b> Evaluation and Management of regional tourist projects			<b>Ident:</b> <b>(SCHOLAR)</b>
<b>Prerequisite :</b> Territorial planning and development of tourist destination centers		<b>Subsequent:</b> Elective of the major core of Tourist Planning (Current tourism topics and trends; Tourism Project workshop; Financial management of tourism projects; Geography of Territorial resources in Sonora)	
<b>Credits:</b> 7	<b>Mode:</b> Semi attendance	<b>Week Hours:</b> 4 (3t y 1p)	<b>Course Hours:</b> 64
<b>Teaching-learning mode:</b> Seminar		<b>Service Department:</b> Accounting	
<b>Formation core:</b> Major			
<b>Specific competencies to develop:</b>			
<b>Competency 2-</b> Planning and designing tourism projects for the diagnosis of social problems.			
<b>Competency 3-</b> Management of resources and evaluation of tourism Projects from an integral diagnosis			
<b>Competency 5–</b> Management of tourism organizations through business plan designing, management of operating systems of tourist services and leads organizations			

**Introduction:**

Commencing the course, students will learn the priorities of preparing tourism projects with a regional approach, following the preliminary analysis of preparing profitable business plans, concluding with internal and external financing sources for their implementation.

This course includes 6 thematic units; first, creation of tourism projects and programs; followed by the identification and selection of tourism development programs; the third unit includes investment studies; the fourth unit covers the structure and components of a feasibility study; the fifth topic is the Financial and socio-economic evaluation of tourism investment and last, those institutions and entities supporting tourism.

**Purpose:**

It is part of the major course; it is given starting the seventh semester and it is an elective course, Students will be able to prepare regional sustainable and socially responsible tourism projects. Students must have basic knowledge of geography, accounting, economics, strategic planning and finance.

**General Objective:**

The aim of this course is to evaluate and manage regional social responsible tourism projects, toward developing tourism business plans through ongoing and interdisciplinary learning..

**Specific Objectives:**

- To learn tourism Project research.
- To analyze ongoing improvement strategies.
- To apply the financial components for preparing tourism projects under a regional approach.

**Competency Units:****Competency Unit I – Creation of tourism projects and programs**

- Programs and projects derived from a national tourism plan
- Identification of:
  - Tourism plan priorities
  - market
  - specific requirements
  - other sources

**Competency Unit II – Identification and selection of tourism development programs**

- Inventory of tourist resources
- Economic, legal and financial criteria

**Competency Unit III – Pre-investment studies**

- Prior feasibility studies
  - Revisions of market conditions
  - Revisions of the selected physical environment
  - Revisions of the evaluation of the developed site
  - Feasibility and profitability

**Competency Unit IV – Structure and components of a feasibility study**

- Market study
  - Analysis of the tourism supply and demand
  - Determination of market quantitative opportunities

- Competition research and analysis
- Technical study
  - Natural conditions
  - Cultural and historical analysis
  - Architectural program
  - Design and dimensioning
- Financial study
  - Investment budget
  - Capital structure
  - Income forecast
  - Operational cost and expense forecast
  - Analysis of expected Project position

**Competency Unit V – Financial and socio-economical evaluation of tourism investment**

- Types of evaluation
- Basic evaluation instruments
- Economic and social evaluation

**Competency Unit VI – Tourism economical supporting institutions and entities**

- Internal financing sources
- External financing sources
- FONATUR

**Evaluation: General criteria for course accreditation:**

Skills and abilities 30%  
Theoretic exams per thematic unit

Integrating project 40%

Attitudes 30%  
Attendance, team participation, homework, respect, punctuality

**Desirable academic qualifications of the course instructor:**

Academic master degree or major of Regional Development or equivalent to the study field of the course, with proven two year minimum experience and professional development in areas similar to this course. A minimum two year higher education teaching experience.

Professional formation and/or degree in an equivalent area, teaching experience in these issues.

Verify the professor formation process requested by the Institution

Conduct an interdisciplinary approach.

Two year teaching experience

For the professor to be programmed and made responsible of teaching this course, he shall have full command of the topics described in the course description, in both English and Spanish.

Bibliography	Type (basic or supplementary)
Hernández, E. (2008). <i>Proyectos turísticos. Formulación y evaluación</i> . México: Editorial Trillas.	Basic
López, M., Morales, D. y Vallejo E. (2003). <i>Financiamiento Turístico</i> . México: Editorial Trillas.	Basic
Vignati, F. (2009). <i>Gestión de destinos turísticos. Cómo atraer personas a polos, ciudades y países</i> . México: Editorial Trillas.	Supplementary
Inzunza, V. (2003). <i>Formulación y evaluación de proyectos de inversión</i> . Hermosillo, Sonora México: Editorial Unison.	Supplementary

**Competency development**

Learning outcomes	Educational activities	Volume of student work in hours	Evaluation
<b>WEEK 1</b>			
At the end of this topic, the student will be able to analyze and review tourism Project articles.	<ul style="list-style-type: none"> <li>Research on the creation of tourism projects and programs.</li> </ul>	4	Presentation of a conceptual diagram
<b>WEEK</b>			
At the end of this unit, the student will be able to compare the different tourism projects	<ul style="list-style-type: none"> <li>Research on the creation of tourism projects and programs.</li> </ul>	4	Theoretical exam
<b>WEEK 3</b>			
The student will carry out research methods to practice an inventory of tourist resources.	<ul style="list-style-type: none"> <li>Identification and selection of tourism development programs.</li> <li>Inventory of tourism resources</li> </ul>	4	Presentation of the inventory

<b>WEEK 4</b>			
The student will analyze the economic, legal and financial aspects involved in tourist legislation	<ul style="list-style-type: none"> <li>• Identification and selection of tourism development programs</li> <li>• Economic, legal and financial criteria</li> </ul>	4	Theoretical exam
<b>WEEK 5</b>			
The student will prepare a presentation of pre-investment studies.	<ul style="list-style-type: none"> <li>• Pre-investment studies</li> <li>• Preliminary feasibility studies</li> <li>• Revisions of market conditions</li> <li>• Revisions of the physical environment selected</li> </ul>	4	Presentation before the group
<b>WEEK 6</b>			
The student will compare a group of presentations of pre-investment studies made by the group.	<ul style="list-style-type: none"> <li>• Pre-investment studies</li> <li>• Preliminary feasibility studies</li> <li>• Revisions of the evaluation of the developed sites</li> <li>• Feasibility and profitability</li> </ul>	4	Theoretical exam
<b>WEEK 7</b>			
The student will prepare a presentation of market feasibility studies.	<ul style="list-style-type: none"> <li>• Structure and components of a feasibility study</li> <li>• Market study</li> <li>• Analysis of tourism supply and demand</li> <li>• Determination of market quantitative opportunities</li> <li>• Competition research and analysis</li> </ul>	4	Presentation in Prezi
<b>WEEK 8</b>			
The student will prepare a video presentation of the technical study of the tourism project.	<ul style="list-style-type: none"> <li>• Technical study <ul style="list-style-type: none"> <li>• Natural conditions</li> <li>• Cultural and historical analysis</li> <li>• Architectural program</li> <li>• Design and dimensioning</li> </ul> </li> </ul>	4	Presentation before the group
<b>WEEK 9</b>			
The student will prepare an Excel presentation of the feasibility studies, including several types of forecasts.	<ul style="list-style-type: none"> <li>• Financial study</li> <li>• Investment budget</li> <li>• Capital structure</li> <li>• Income forecast</li> </ul>	4	Presentation before the group
<b>WEEK 10</b>			
The student will prepare an Excel presentation of the feasibility studies,	<ul style="list-style-type: none"> <li>• Financial study</li> <li>• Operational cost and expense forecast</li> <li>*Analysis of expected Project position</li> </ul>	4	Presentation before the group
<b>WEEK 11</b>			
The student will prepare a comparative matrix of the types of evaluation	<ul style="list-style-type: none"> <li>• Financial and socio-economic evaluation of tourist investment</li> <li>• Types of evaluation</li> <li>• <i>Research on the different types of evaluation of tourism investment</i></li> </ul>	4	Preparing an essay
<b>WEEK 12</b>			
The student will research evaluation instruments	<ul style="list-style-type: none"> <li>• Financial and socio-economic evaluation of tourist investment</li> <li>• Types of evaluation</li> </ul>	4	Holding a group meeting to analyze evaluation

	<ul style="list-style-type: none"> <li>• <i>Research on the different types of evaluation of tourism investment</i></li> </ul>		instruments
<b>WEEK 13</b>			
The student will understand the importance of the economic and social evaluation of a tourism project	<ul style="list-style-type: none"> <li>*Financial and socio-economic evaluation of tourism investment</li> <li>*Economic and social evaluation</li> </ul>	4	Preparing an inquiry on economic and social evaluation
<b>WEEK 14</b>			
The student will analyze the different financing institutions and entities.	<ul style="list-style-type: none"> <li>• Tourism economic supporting institutions and entities</li> <li>• Internal financing sources</li> </ul>	4	Conceptual diagram
<b>WEEK 15</b>			
The student will analyze the different financing institutions and entities.	<ul style="list-style-type: none"> <li>• Tourism economic supporting institutions and entities</li> <li>• External financing sources</li> </ul>	4	Comparative matrix of the different financing sources
<b>WEEK 16</b>			
Interview COFETUR officers to know the procedure for FONATUR loans	<ul style="list-style-type: none"> <li>• Tourism economic supporting institutions and entities</li> <li>• FONATUR</li> </ul>	4	Presentation of a practicum