



# Food and Drink Fellowship Review Stage 1

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# 1. Introduction

This report summarises the initial findings for the study to undertake a review of the Food and Drink Fellowship (The Fellowship), and prepare options for an industry survey to explore demand for this type of provision.

This phase of the study involve desk analysis of documentation, an overview of Leadership and Management provision, consultations with stakeholders and partners, and a limited number of interviews with both participating and non participating companies.

## 1.1 Background

F&D is a key industry for Scotland's economy, and improving the supply of appropriate technical and leadership skills has been identified as one of the key elements of the Scottish Food and Drink Strategy.

In September 2010 The Fellowship was launched in response to the perceived demand for this type of formal accredited training for future highly skilled leaders in the F&D sector. Its overall objectives were to:

- fast track future leaders of the industry;
- provide the individual and the business with the skills to pursue and manage growth; and
- realise business improvement (through a project).

The take up of the programme was lower than had been anticipated (only 4 participants, 3 of whom completed), and no second round of recruitment has yet been initiated.

## 1.2 Structure

The remainder of this report is structured as follows:

- **Chapter 2** summarises a brief review of Management and Leadership provision;
- **Chapter 3** highlights key findings from consultations and interviews; and

- **Chapter 4** proposes some options to be explored further in a company survey.

A draft company survey is appended for consideration.

## 2. Leadership and Management Delivery Landscape

As part of the review the study has undertaken a brief exploration of Leadership and Management provision that is available to companies interested in pursuing support in this area.

In 2010, as part of the development of the Skills Strategy<sup>1</sup> the Scottish Government had undertaken a mapping of Leadership and Management provision from the public sector agencies (Scottish Enterprise, Highlands and Islands Enterprise and Skills Development Scotland) and also briefly from other wider organisations.

For this study we updated this information and attempted to look at the provision through the lens of a Food and Drink company.

N.B. This was not an attempt to fully map the Leadership and Management provision available for the public, private and university/college sectors. It was more to give a flavour of the type and range of training and services offered, with specific emphasis on the Food and Drink sector where available.

### Private Sector Courses

A brief review of the Skills Development Scotland course search facility reveals that even on an initial scan there are 178 Leadership and Management courses available within Scotland, through private training companies, organisations such as the Institute of Directors, and other providers. It should be noted that most of these courses will not be specific for the Food and Drink Sector. Reviewing Food and Drink targeted courses there is a wide range of Leadership and Management courses available within the private sector e.g. offered through Scottish Bakers and IGC Academy, (see [Table 1](#) below) often focused on management of supply chains.

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<sup>1</sup> <http://www.scotland.gov.uk/Topics/Education/skills-strategy/making-skills-work/utilisation/LMRS>

Table 1: Private Sector

Organisation	Course	Level	Type of Course	Location	Food and Drink Specific			
Scottish Bakers	The Developing Manager	n/a	Workshop	Scotland	Yes			
	Leading the team	n/a	Workshop	Scotland	Yes			
	Train the Trainer	n/a	Workshop	Scotland	Yes			
	You and Your Team	n/a	Master Class	Scotland	Yes			
	Food Manufacture Vocational Qualifications	Level 3 (management skills)	Apprentice	Scotland	Yes			
	Management	Level 3	Academic	Scotland	Yes			
	Management	Level 4	Academic	Scotland	Yes			
	Specialist Management Skills	Level 3	Academic	Scotland	Yes			
IGD Academy <sup>2</sup>	Building effective trading relationships	not specified	not specified	not specified	Yes			
	Introduction to supply chain				Yes			
	Shopper engagement				Yes			
	Category management: ranging and merchandising				Yes			
	Winning in the online environment				Yes			
	Investment and promotional effectiveness				Yes			
	Data Driven Insights				Yes			
	Sustainability: understanding the FMCG perspective				Yes			
	Food and Grocery Management				Postgraduate	Academic	England	Yes
	Management: getting started					Workshop	England	Yes
Institute of Leadership and Management	Leadership and Management Skills	Level 3 Award	Academic	Glasgow	No			
		Level 3 Certificate	Academic	Various locations	No			

<sup>2</sup> Course information such as level, location etc was not available for IGC Academy and prospectus students would have to enquire for more information.

Organisation	Course	Level	Type of Course	Location	Food and Drink Specific
		Level 3 Diploma	Academic		No
		Level 4 Certificate	Academic		No
		Level 4 Diploma	Academic		No
		Level 4 Extended	Academic		No
		Level 5 Award	Academic		No
		Level 5 Certificate	Academic		No
		Level 5 Diploma	Academic		No
		Level 5 Extended Diploma	Academic		No
	Strategic Leadership and Management	Level 7	Academic		No
	Leadership	Level 3 Award and Certificate	Academic		No
		Level 4 Award	Academic		No
		Level 5 Qualifications	Academic		No
	Strategic Leadership	Level 7 Qualifications	Academic		No
JB Management	Supply Chain Management	SVQ Level 2	Academic	Ayr	No
		SVQ Level 3			No
		SVQ Level 4			No
		SVQ Level 5			No



## Public Sector Courses

Scottish Enterprise and Highlands and Islands Enterprise provide a number of Leadership and Management courses ranging from online assistance, workshops, seminars to one-to-one mentoring and project development, [Table 2](#).

**Table 2: Public Sector**

Organisation	Course	Level/Aimed at	Type of Course	Location	Food and Drink Specific
Scottish Enterprise	Leadership Essentials	Aimed at: Decision makers in Scottish businesses	4xHalf day workshops, personal assessment and mentoring	Throughout Scotland	No
	Leadership for Growth	Aimed at: Senior and board-level decision-makers in ambitious growing businesses	Minimum of 6 workshops over 6 month period plus mentoring	Throughout Scotland	No
	Rural Leadership	Aimed at: Senior decision makers from rural businesses	Workshops, coaching and parliamentary visits	Throughout Scotland	No
	Leadership Best Practice Visits	Aimed at: Senior management	Presentations by the leadership team, a site tour, Q&A and panel sessions	Various locations depending on business	No
	Leadership Learning Journeys	Growing businesses using our account management service	Travel overseas with other Scottish business leaders to visit other companies and meet their senior staff	Overseas	No
	Managing People for Growth	Aimed at: New and experienced people managers	4 core workshops and 4 optional workshops	Scotland	No
	Organisational Review		Report of organisational capabilities and help to implement organisational change	Scotland	No
	Investors in People	Businesses with 2 or more employees	Business tool designed to help organisation with Co.	Scotland	No
	Success through Succession	Aimed at: senior managers and family owned businesses	Seminars, workshops, coaching and/or mentoring	SE West and South	No
Highlands and Island Enterprises	Institute of Directors Course and Lectures	SMEs	Seminars, workshops, networking,	HIE area	No
	Emerging Leaders Programme	SMEs (Middle managers)	Seminars, workshops, networking, programme development	HIE area (Shetland only to begin with)	No
	Entrepreneurs Growth	SMEs with growth potential/CEOs/Middle	Workshops, self help, programme	HIE area	No

	Programme	managers	development		
	Entrepreneurship Development Programme	SMEs with growth potential/CEOs/Middle managers	Accredited course, self help, programme development, networking, mentoring and/or coaching	HIE area	No
	High Level Leadership Programme	SMEs/Business leaders/Senior managers	Self help, programme development, networking, mentoring and/or coaching	HIE area	No
	Podcasts – Learning for the Portable World, Virtual Conferences	Rural firms	Series of virtual conferences and podcast to allow rural firms to participate with ease.	HIE area	No

All of the public sector support in [Table 2](#) (above) is generic leadership and management support, and not tailored specifically to Food and Drink organisations. However an exception to this is shown below in [Table 3](#). Improve detail support specific to food and drink in the form of Modern Apprenticeships, focused on manufacture, although this may be viewed as not strategic and stretching enough for the Leadership and Management provision envisaged for the Fellowship.

**Table 3: Public Sector – Specific to Food and Drink**

Organisation	Course	Level/Aimed at	Type of Course	Location	Food and Drink Specific
Improve	Food Manufacture (specialist management skills)	Level 3	Modern Apprenticeship	Scotland	Yes
	Food and Drink Manufacture (distribution skills)	Level 2	Modern Apprenticeship	Scotland	Yes

### University Courses

The majority of universities within Scotland offer a range of Leadership and/or Management modules within their business schools. However, it should be noted that an emphasis of Leadership and Management courses are at postgraduate level or intensive level aimed at senior management/CEOs. [Table 4](#) provides a summary of courses available. There is, again, a lack of leadership and management courses related specifically to Food and Drink.

**Table 4: University Courses**

Organisation	Course	Level	Type of Course	Food and Drink Specific
Open University	Leadership and Management: Standard pathway	Foundation Degree	Academic	No
		BA Hons	Academic	No
University of Glasgow	Leadership and Management	Pg Diploma	Academic	No
Napier University	Advanced Leadership Practice	MSc	Academic	No
	Entrepreneurial Leadership	MSc	Academic	No
University of Highlands and Islands	Leadership and Management	Pg Diploma/Pg Certificate/MSc	Academic	No
University of the West of Scotland	Management and Leadership	Pg Diploma	Academic	No
Glasgow Caledonian University	Operations and Business Management	MSc	Academic	No
	Global Supply Chain and Logistics Management	MSc	Academic	No
London Business School	Essentials of Leadership	Aimed at: Director/general managers	5 day programme	No
	Emerging Leaders Programme	Aimed at: Participants with 3-10 yrs experience	2 weeks/1 week programme	No
	High Performance People Skills for Leaders	Aimed at: Senior managers	5 day programme	No
	Leading Change	Aimed at: Executives	5 day programme	No
	Masters in Management	Undergraduate degree and less than one years exp	Academic	No
	Sloan Masters in Management	Aimed at: Senior managers	Academic	No

## College Courses

Again a variety of leadership and management courses are available to be studied at College, [Table 5](#) details a small sample. However there is a lack of food and drink specific courses. Food and drink specific courses detailed by the colleges tended to focus on such things as health and safety, food hygiene, etc.

**Table 5: College Courses**

Organisation	Course	Level	Type of Course	Location	Food and Drink Specific
Andrew Carnegie Business School	Management and Leadership	CMI Diploma	Academic	Dunfermline	No
	Strategic Management and Leadership	CMI Diploma	Academic	Dunfermline	No
North Glasgow College	Introductory Award to Leadership and Management	Level 3	Academic	Glasgow	No

## Summary

In summary, there is no shortage of leadership and management courses available within Scotland and further afield across the private, public, and educational sectors. There is, however, a lack of courses specific to leadership and management within the Food and Drink sector. The main emphasis of Food and Drink leadership and management courses were available within the private sector provided by Scottish Bakers and IGD Academy.

### 3. Consultation feedback

The study undertook consultations with delivery partners, stakeholders, participating and non participating companies. (A list of those interviewed to date is given in Appendix A It should be noted that interviews are still underway).

The following section highlights some of the key areas raised within those discussions.

#### Ownership

There was a feeling amongst consultees that there was a lack of ownership for the project with no obvious project manager driving forward the programme. Given the multi-partner delivery model this was potentially an omission.

The launch of the Fellowship was seen to have been rushed to take the opportunity from the launch of the Skills Academy (although the academy was not technically launched until November, the staff were in place). In addition, for practical reasons, there was a wish to take advantage of the quiet times before the start of the academic year. This had led to a lack of research into real demand before embarking of the programme.

The lack of an overall owner led to the issue of accreditation not being resolved sufficiently and the final projects not being driven forward to a speedy conclusion.

#### Marketing

As mentioned above the launch of the Fellowship was aimed to capitalise of the publicity surrounding the launch of the F&D Academy. However there was no budget assigned to marketing the programme itself, and so largely relied on word of mouth. Previous anticipated commitment from F&D board members failed to translate into take up, and it appear that other avenues, such as account managers within SE, were not actively progressed beyond passing on information.

There was not sufficient time to produce professional looking marketing/promotion materials, no consistent format/branding and a lack of concrete illustrations of the modules (which were still under development at the time of recruitment).

Company feedback suggests that the Fellowship was not very visible, and not differentiated from other offerings.

Targeting of this kind of programme is challenging. In effect the participants need to be middle managers, but those who will commit to their participation will be the senior managers in the companies. It was not clear from the marketing how effective targeting was used to reach the right audience.

No round 2 of recruitment was undertaken to try and recruit for a further cohort, possibly due to a lack of overall owner, and a lack of budget.

### Timing

As mentioned above, the launch of the programme was pushed forward to build on the launch of the F&D academy (i.e. for the academy to be seen to have an active programme underway). This meant that the Fellowship was under pressure to start as soon as possible. This may have exacerbated recruitment issues as there was little time for companies to organise personnel release, or it conflicted with more immediate company priorities.

N.B. Any recruitment for future programmes should take account of the need for small companies to plan and organise to manage around this type of investment.

It should also be noted that the pilot fellows presented at the launch of the academy, but no follow up was undertaken for a round 2 to capitalise on the interest they stimulated. This was potentially a missed opportunity to recruit a second cohort.

The Fellowship was envisaged as a year long programme, and yet the final module of the internal company project has taken nearly a further year for participants to complete. Participant feedback indicates this could partly be attributed to lack of ownership for this element, or lack of built in aftercare/follow up to mentor participants towards a successful conclusion. In addition the course design undoubtedly underestimated the effort and support that would be needed to push the project to conclusion. It should be noted that feedback suggests the projects had been finished and implemented, just not written up in such a way that they could be accredited through academic channels.

It is also worth noting some changes in staffing meant that there was some discontinuity between the initial design and delivery teams, and this also exacerbated the ownership issue mentioned above.

## Design

A number of issues were raised regarding the design of the current Fellowship programme:

- **Cost.**  
Companies interviewed identified the issue of cost, or at least value for money, as a very important factor in their choice of training. As described in Chapter 2 there are a whole range of Leadership and Management offerings available to companies, many of them free or low cost. The price of the Fellowship ranks alongside a Masters or MBA programme. This high price was highlighted as a barrier to recruitment, even when some companies were offered significant subsidy for participation.
- **Time out of work**  
Whereas it was highlighted that getting participants away from the place of work can be beneficial (removed from distractions of phones etc.), this group of managers often play a pivotal role in the running of what are usually very small businesses. As such taking this critical individual away from the workplace for a week at a time was raised as an issue for involvement. One small company that did not take up the course cited time away from work as being a key barrier.
- **Theory vs. practice**  
It was highlighted that the programme needs to be practical and show real benefit to the workplace to be seen as relevant. Whereas the live situations were integrated into the programme (and were deemed to be valuable), there was perhaps not sufficient focus in taking that learning back into the workplace until the final module.

*“taking it back to work is very important - that’s where you really learn how to do it”*

- **Support for project implementation**  
The implementation of the final project took much longer than was anticipated. On reflection one of the challenges was supporting the

participants in the right approach to taking their learning into practical application, as well as continuing to drive the programme to completion (against the competing demands of the day to day job). Mentoring was needed to help the participants overcome that hurdle.

- Modular approach

Whereas the Fellowship was designed as a modular programme, there was a perception that a participant needed to commit to the whole package. Once there were sufficient participants for the programme to go ahead, there was the option for signing up for single modules. However this was not strongly publicised. A more flexible approach where individuals could sign up for specific modules, and potentially then build to an overall qualification would involve less up front commitment. This was seen as an important element in company feedback.

- Positive strengths

The participants appeared to value networking opportunities between peers, although given the size of the cohort that was more limited than had been anticipated. There is some debate as to whether it is more beneficial to have companies from the same or different sectors with whom to discuss management issues and challenges. Learning from others and site visits were highlighted as valuable areas that should be explored further in future programme, including case studies, and drawing on the experience of the large firms (e.g. drinks sector).

It is worth highlighting that all three participants who completed had gained a promoted post. Although it is questionable as to how much the Fellowship could be deemed to be a contributory factor in this, not least because they had already been identified as future leaders, it is nonetheless an encouraging sign.

- Qualification

It was not clear what qualification the participants would receive. Given the time commitment and cost of investment, this is something that should be clarified and publicised in the future. It should also be noted however, that gaining a qualification was not a strong driver to participation. (This will be tested further in the industry survey).



## Other provision

As discussed in an earlier chapter, there is extensive provision available for companies looking for support in this area. This has become an even greater focus for investment e.g. through public sector programmes such as SE's portfolio of Leadership programmes.

*“the landscape is awash with Leadership & Management options”*

Whereas this is true, there is not an obvious offering for leadership and management targeted particularly at Food and Drink.

However, it is worth considering that both Leadership and Management and Supply Chain understanding are highlighted as needs for the sector. Although they overlap for leaders in Food and Drink, they are not the same thing, and could be offered separately.

Another opportunity for peer learning is found through industry events. However it was highlighted that the participants at these events were often the company leaders. This still left a gap for those future leaders to gain support and training before they gained further responsibility.

## Need

Research has shown a real need for improved Leadership and Management in the sector, where small family run businesses predominate. However, it was raised that these businesses often don't recognise the need and so it is difficult to translate that need into demand for services. Reviewing recent Training Needs Assessments from the Academy, only 4 out of 41 highlighted the need for a fellowship level programme. Within Organisation development Reviews from SE, Leadership and Management did feature regularly, but once again not necessarily identifying a need where the fellowship programme would be an obvious fit. Here the focus was on leadership teams and effective business growth.

As discussed above, there is not clear demand either for a specific Food and Drink provision in this area. A generic Leadership and Management provision could be supplemented by food and drink “bolt-ons”. There is also the added complication of trying to tailor something that is broad enough to be relevant across multiple subsectors.

## Pipeline

As mentioned above Leadership and Management was not often highlighted as a priority for companies undertaking WBA. This is perhaps because it is seen as a longer term need, and not an immediate priority for businesses.

Suggestions for enticing companies to invest included engaging them with small sessions (workshops, masterclasses, learning journeys) and then building up as benefit is seen to be gained. This would also help overcome challenges in different learning styles – only certain participants flourish with a more theoretical/academic approach which needs a level of commitment.

There was an appreciation that the different bodies with an interest in supporting this area were now better joined up and through the F&D action plan better able (and willing) to cooperate.

It was definitely seen as still a need within the industry. Focus generally for support is beginning to fall on those businesses with the ability to grow (not just survive) as this will give the best return for the industry in its ambitions for growth. It makes sense therefore for the future leaders of these organisations to be the target of Leadership and Management support. Where these are SMEs they often don't have the internal processes to take forward Leadership and Management improvement and so therefore need signposting and support to deliver that improvement.

## 4. Options for further exploration

The second stage of the study is to further explore industry demand for future Fellowship type provision, and put forward recommendations of how this should therefore be taken forward.

In order to design the company questionnaire it is useful at this stage to consider some options for next steps.

It is worth noting that some of these options are not mutually exclusive, and we do not envisage developing the survey to encourage the companies to “pick” one option or another. More we wish to get them to articulate the priorities for them in investing in Leadership and Management training for their future leaders.

From this feedback we hope to be able to put forward evidence based recommendation on how this support should be implemented.

### Option 1 – Run again

Run the programme largely as is, but taking cognisance of the improvements in delivery highlighted through this analysis.

This would include:

- Establishing a Fellowship owner and appointing a project manager;
- Building a robust marketing and recruitment campaign;
- Working in partnership across the stakeholders to input to design and delivery as well as recruitment;
- Resolve qualification accreditation /certification.

### Option 2 – Close

A further option is to decide that there is sufficient provision available for those companies that wish to take forward investment in Leadership and Management.

The partners' roles would be focused on signposting linking company needs to adequate provision.

### Option 3 – Tailor Other Provision

Given that much provision is generic, one approach would be to tailor certain offering for the specific needs of the Food and Drink sector, for example public sector or university current provision.

SE is already piloting this approach with another sector, Forestry, which has some of the same issues. This has involved twilight sessions to meet the needs of the individuals' other commitments, and tailored case studies and examples..

### Option 4 – Modular approach

Developing a more flexible programme where participants could take one module at a time, tapping into the most relevant areas of training for them individually. This could build to an overall accreditation / qualification. It may be that within this design there are core elements (fundamentals of Leadership within F&D) and then optional modules which can be selected. A more selective approach has bears particular risks, however, in relation to financial viability.

### Option 5 – Experiential Learning

A key element of embedding learning is to show that it has been embedded and implemented by the individual. Focussing the programme on project based experiential learning (supported by mentoring) will not only help the participant to put into practice the learning, but also should benefit the company through improvements implemented. This would ensure the programme was bespoke, project led and business focused.

As part of this, and to be as flexible as possible, on-line theoretical learning would be build into the design, such that the participant can learn at the their own pace and at a time convenient to themselves (especially for example if they are working shift hours), and then, with support from the programme mentor, apply that learning to real life practical situations.

## Option 6 – Fill the F&D Gap

Given that the research has shown a plethora of Leadership and Management provision, the only case for further investment in the Fellowship is the need for a F&D specific element to the training. This final option focuses on this element and proposes that generic provision is largely used (signposted by partners) and the investment focuses on filling the F&D gap. This could be through a combination of supply chain management, best practice visits, learning journeys, sharing experience across subsectors (and sectors outside F&D), networking for future leaders, etc.

### Next steps

As discussed above these options are not final, but give a flavour of different approaches that could be taken.

At this stage it is crucially important to explore with companies their priorities for investment decisions and delivery mechanisms. In addition the demand for this type of provision (as opposed to the need) will also be explored.

A draft company survey is attached in Appendix B for discussion with the steering group.

## Appendix A - Consultees

F&D Fellowship Consultations Stage 1 (to date)

Lynn Curran	Scottish Enterprise
David Lamb	Scottish Agricultural College
John Nixon	Scottish Food & Drink Skills Academy
Gerry McBride	Skills Development Scotland
Amanda Brown	Scotland Food & Drink
Gary Mullholland	University of Abertay
Trish Winchester	TIO
Pat Campbell	Campbells Cakes
Brian Steven	AK Stoddart
Nigel Scott	Institute of Directors
Mark Bush	Summer Harvest Oils
Dennis Overton	Aquascot
Fiona Lamotte	Scotherbs
Lewis Maclean	Highland Bakeries

## Appendix B – Draft Company Survey

## Food and Drink Leadership/Management Training

### Online Industry Survey

#### Company Background

Name of Company	
Your Name	
Position	
Tel No	
Location of main Scottish base	

#### Leadership/management skills and training in your company

1. How important is investment in leadership and management to your company's business/ growth ambitions? (1=not important; 5= very important)				
1	2	3	4	5
Please give reasons for your response.				

2. What leadership/management skills does the company need to develop to achieve its ambitions?	
	Tick all that apply
General business knowledge	
Strategic and operational planning	
Managing change	
Negotiating and influencing	
Communication	
Financial/accounting	
Supervisory skills	
HR and people development	
Product and process development	
Market development / exporting	
Logistics management	
Food/drink manufacturing management	
Other (please specify)	
Nothing at the moment	
Please specify.	

3. What is being done to increase leadership/management skills in the company?	
	Tick all that apply
Company provides in-house training	
Staff take part in non-industry specific training (e.g. MBA)	
Staff take part in industry-specific training	
Nothing at the moment	



Please provide details. What attracted you to this option?

4. What is your annual **spend per participant** in leadership/management training?

	£/head
£0	
£1-£500	
£501-£1,000	
£1,001-£2,000	
£2,001-£4,000	
£4,001-£6,000	
£6,001-£8,000	
£8,001-£10,000	
£10,000+	

5. How important are the following in selecting leadership/management training?

(1= not important; 5=very important)

	1	2	3	4	5	n/a
Having a food and drink focus						
Flexibility to select modules						
Being able to fit around normal work						
Being able to release staff for appropriate length of time to focus on studies						
Having class based learning element						
Having online learning element						
Having work-based assignment element						
Having an experiential element (industry visits, etc)						
Learning from peers						
Learning from other parts of supply chain						
Learning from outside food and drink industry						
Gaining a qualification						
Cost						
Reputation of provider delivering the training						

Why do you say this?

**Food and Drink Specific Leadership/Management Training**

6. Do you agree that there is a need for leadership/management provision that is tailored specifically to the food and drink industry?

	√
Yes	
No (Go to <b>Q11</b> )	
Don't know	

Please give reasons for your response.

7. Would your company consider participating in food and drink tailored leadership/management training in the next three years?

	√
Yes	
No (Go to <b>Q11</b> )	
Don't know	

8. What would you see as the optimum balance of delivery for this training?

	%
% class based	
% individual learning (online / assessed project)	
% experiential (industry visits, etc)	
	100%

9. What length of time would be appropriate to release staff to participate in modules (i.e. sequential time away from work)?

	√
Half day	
1-2 days	
3-4 days	
5 days+	
None (staff would have to train in own time)	

Please give reasons for your response.

10. Do you have any other comments you would like to raise about food and drink leadership/management issues in general?

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Main activities/subsector	
Number of employees (Scotland)	
Number of staff at supervisor/ manager level and above (Scotland)	
Annual turnover	
% sales outside UK	

**Thank you for your participation in this survey.**

**Please tick if you are willing to be contacted for further discussion in relation to the development of management/leadership training provision.**