Allocate tour resources

D2.TTG.CL3.02
D2.TTO.CL4.01

Assessor Manual

Specialist centre for foods, tourism & hospitality

Allocate tour resources

D2.TTG.CL3.02
D2.TTO.CL4.01

Assessor Manual

Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria
Telephone: (03) 9606 2111
Facsimile: (03) 9670 1330

Acknowledgements

Project Director:	Wayne Crosbie
Project Manager	Jim Irwin
Chief Writer:	Alan Hickman
Subject Writer:	Alan Hickman
Editor:	Jim Irwin
DTP/Production:	Daniel Chee, Mai Vu, Cindy Curran

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	**Tick (✓)**	**Remarks**
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the ‘Assessment Method’ columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each ‘Element of Competency’ in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

UNIT TITLE: ALLOCATE TOUR RESOURCES	NOMINAL HOURS: 40
UNIT NUMBER: D2.TTG.CL3.02 D2.TTO.CL4.01	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to assign the necessary human and physical resources to enable the safe, effective and profitable implementation of tour operations.	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Determine resource requirements **1.1** Identify the *factors that will determine resource requirements for a tour* **1.2** *Discuss resource needs with colleagues* **1.3** *Consider previous tours* that have been conducted **1.4** Identify safety and legal issues that must be complied with **1.5** Determine *availability of required resources* **1.6** *Identify specific resources* for individual tours **1.7** Prepare short and long-term plans for resource acquisition **Element 2: Allocate resources** **2.1** Coordinate the *availability of physical resources*	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that allocate human and physical resources to support tour operations within the labour divisions of the hotel and travel industries and may include: 1. Tour Operation *Factors that will determine resource requirements for a tour* may be related to: • Type of tour • Location of tour • Duration of tour • Starting and finishing time of tour • Size of tour group • Special needs and special requests

2.2 *Match resources* to identified tour requirements **2.3** *Comply with budget limitations* when allocating resources **2.4** Provide *resource information and support* to colleagues **2.5** *Issue the identified physical resources* as identified **2.6** *Distribute physical resources* to required locations **2.7** *Arrange for third party supply* of resources **2.8** Verify supply of appropriate and adequate resources with tour guide and other personnel **Element 3: Review resource allocation** **3.1** Compare resources used with budget and revenue raised **3.2** *Review actual conduct of tour* and compare with expectations **3.3** Identify *resources that need to be revised for subsequent tours* **3.4** Revise *standard tour-related documentation*	• Types of customers expected on tour including considerations that may apply to infants, children, the elderly and the disabled • Resources available on-tour and/or at tour site from third parties, via vouchers and specific arrangements that have been made • Conditions of the tour including weather, environmental, geographical and other issues that may impact • Understanding activities, products and services advertised for the tour. *Discuss resource needs with colleagues* will include: • Analysing operational issues • Considering how lack of resources impacts timing and safety issues • Identifying emerging resource needs. *Consider previous tours* may be related to: • Analysing feedback • Investigating accidents, incidents and near-misses • Checking levels of customer satisfaction. *Availability of required resources* may relate to: • Use of resources for other tours • Damaged, malfunctioning or missing items • Equipment that no longer meets changed needs • Physical location of items • Roster considerations for human resources. *Identify specific resources* should relate to: • Naming types and forms of physical resources required including: ▪ Vehicles and vessels

	▪ Aircraft and other types of transport including live transport such as horse or camels, bikes and motorbikes ▪ Camping and catering equipment including food, beverages and refreshments ▪ Safety equipment including first aid kits and communication equipment ▪ Recreational and activity equipment ▪ Maintenance equipment ▪ Educational equipment ▪ Cash ▪ Vouchers • Naming staff required to conduct tour including identification of roles and responsibilities based on experience, qualifications, training and integration of skill sets. Human resources may include: ▪ Drivers ▪ Tourist guides ▪ Driver guides ▪ Hosts and hostesses ▪ Campsite cooks ▪ Interpreters ▪ Camp and tour assistants • Quantifying physical resources by number, amounts, values and volumes • Quantifying human resources by number and hours. *Availability of physical resources* may relate to: • Cleaning requirements • Scheduled service

	• Repairs and replacements • Items being used elsewhere, or on other tours • Purchasing additional items. *Match resources* must include: • Ensuring correct types and amount of physical resources • Ensuring appropriate staff with required skills, knowledge and experience. *Comply with budget limitations* must include: • Ensuring safety is not compromised • Obtaining authority for budget over-runs • Adjusting resource allocation, where possible, to eliminate cost over-runs. *Resource information and support* may include: • Written information including handouts, data sheets, checklists and manufacturer's information and instructions • Verbal information including descriptions, cautions and advice • Demonstrations • Training • Practice. *Issue the identified physical resources* may include: • Locating the items in storage • Removing them from storage • Completing internal stock control/management documentation including requisitions, bin cards, stock sheets, computer files and fields

	• Completing tour resource checklists • Checking safety and completeness of each item issued • Recording identification/serial numbers of items, tickets and vouchers • Obtaining signature(s) from tour guide or other colleagues for equipment, cash and vouchers. *Distribute physical resources* may include: • Transporting resources to tour destinations including starting points, activity points and refreshment/meal break locations. *Arrange for third party supply* may include: • Organising the provision of perishable items from local suppliers and venue • Making arrangements regarding vehicle requirements including fuel and service • Issuing vouchers for on-site provisions, such as entry, meals, refreshments, samples and rides. *Review actual conduct of tour* may include: • Soliciting feedback from colleagues and customers • Analysing incident reports. *Resources that need to be revised for subsequent tours* may include: • Purchasing additional equipment to meet emerging need • Replacing damaged or stolen items • Complying with new legislated requirements • Substituting items.

	Standard tour-related documentation may include: • Advertising material • Tour checklists • Tour itineraries • Tour resource stock sheets, duty allocations and rosters • Plans including emergency responses. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Enterprise policies and procedures in regard to resource acquisition, purchasing, storage, use, control and allocation • Principles of control, planning and management of physical and human resources • Ability to use planning, scheduling, organisational and contingency management skills and techniques • General industry knowledge in relation to resource requirements for different tour types, groups, locations and customer need. **Linkages To Other Units** • Work as a tour guide • Drive various types of service vehicles • Lead tour groups in a responsible manner • Prepare and present tour commentaries • Provide arrival and departure assistance • Carry out vehicle maintenance or minor repairs • Manage and execute a detailed tour itinerary

	• Manage operational risk • Maintain tourism vehicles in safe and clean operational condition • Operate and maintain a 4-WD vehicle in safe working condition • Operate tours in remote areas • Set up and operate a camp site • Provide camp site catering. **Critical Aspects of Assessment** Evidence of the following is essential: • Understanding the legal and safety implications of providing adequate and suitable resources for tours • Demonstrated ability to identify, quantify and cost the physical and human resources required to effectively and safely enable the conduct of a nominated tour at a given location for a stated number of customers from a specified market sector • Demonstrated ability to provide tour staff with necessary information and training to enable them to effectively use a nominated range of physical resources required on a designated tour/tour type • Demonstrated ability to debrief tour staff with a view to identifying resource modifications and/or requirements for subsequent similar tours. **Context of Assessment** Assessment must ensure: • Actual or simulated workplace application of resource identification, storage, acquisition and control procedures • Actual or simulated itineraries for tours of varying durations at various locations for groups of various sizes and various types.

	Resource Implications Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Training and assessment must include the use of real or simulated pre-tour requirements and information and the use of real tour facilities, equipment, resources and staff. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Inspection and assessment of allocated resources against given tour requirements and parameters • Case studies • Role plays • Oral and written questions • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Capture information to use as the basis for resource identification and allocation
Communicating ideas and information	2	Discuss resource needs with staff

	Planning and organising activities	3	Determine resources to be purchased, obtained and allocated for nominated tours
	Working with others and in teams	3	Liaise with staff in post-tour debriefings
	Using mathematical ideas and techniques	2	Calculate rosters, costings and quantities of resources needed
	Solving problems	3	Resolve an equipment shortage situations
	Using technology	2	Use calculator to cost resources; operate emergency and communication equipment

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Allocate tour resources D2.TTG.CL3.02 D2.TTO.CL4.01
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. What factors do you consider when determining resources required for a tour?	❑	❑
2. What discussions do you have with colleagues in relation to resources required for a tour? Who is involved in the discussions and what is talked about?	❑	❑

Questions	Response	
	PC	NYC
3. Give me an example of what you have learned from a previous tour has impacted resource allocations to a subsequent tour.	❑	❑
4. Tell me about the safety and legal issues you need to consider when allocating resources for a tour.	❑	❑
5. What activities do you undertake to determine availability of resources required for a tour?	❑	❑

Questions	Response	
	PC	NYC
6. Identify two tour types and describe the resources required for each.	❑	❑
7. Describe the short-term and long-term plans you have prepared for acquiring tour resources: how were they prepared? What period do they cover? What do they contain?	❑	❑
8. Give me an example of having coordinated availability of physical resources for tours: what were the tours? What difficulties/issues had to be addressed? How did you meet all requirements?	❑	❑

Questions	Response	
	PC	NYC
9. Give me two examples of how you match tour resource allocations to actual tour requirements.	❑	❑
10. What is involved when you allocate resources to a tour in order to ensure you comply with budget limitations?	❑	❑
11. Demonstrate how you would provide resource information to a colleague about resources allocated to tours.	❑	❑

Questions	Response	
	PC	NYC
12. What protocols do you implement when issuing resources to tours/tour personnel?	❑	❑
13. Give me an example illustrating what you do to distribute physical resources to a tour at a remote location.	❑	❑
14. What resources do third party suppliers provide for you for tours? Who are the suppliers and what is involved in arranging for required items to be supplied?	❑	❑

Questions	Response	
	PC	NYC
15. Describe the protocols you use for verifying supply of appropriate and adequate resources to tours: who is involved in the process, and what do you say/do?	❑	❑
16. Explain what you do to compare ‘actual’ use of resources for a tour with ‘budgeted’ use and revenue raised.	❑	❑
17. In relation to reviewing ‘resource allocation’ for tours how do you review actual conduct of each tour to learn lessons for the future?	❑	❑

Questions	Response	
	PC	NYC
18. Give me two examples of instances where a review of actual tours conducted resulted in revisions to resource provided for later tours: what were the tours? What were the resources? What caused the need to revise resource provision?	❑	❑
19. Give me two examples where you have revised tour allocation standard procedures and/or documentation on the basis of your review of actual tours conducted.	❑	❑

Written questions

Allocate tour resources – D2.TTG.CL3.02
D2.TTO.CL4.01

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What are the four classifications of resources necessary to allocate for tour operations?

____

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2. Name four ways a person can identify what resources might be needed on a tour.

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3. List eight factors that may determine resource requirements for a tour.

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4. List the three classifications of colleagues who may be talked to discuss resource needs for tours.

5. Identify four topics which might be talked about when discussing resource needs for tours with colleagues.

6. When considering previous tours which have been conducted name three generic areas which must be considered.

7. In relation to the allocation of tour resources give three reasons to undertake research and analysis of previous tours which have been conducted.

8. Briefly explain the common law Duty of Care which all tour businesses must comply with.

9. Identify six ways to identify safety and legal issues which may require compliance from the point of view of allocating resources for tours.

10. What are the three elements of a structured risk management process?

11. Describe four actions you might take to determine resource availability for an upcoming tour.

12. In relation to a 'one-off tour' what MUST form the basis of determining specific resources required for the tour?

13. Give three examples of factors which can indicate/dictate the need for differences to the standard allocation of resources to regular tours?

14. Describe four statements which are contained in Exclusion clauses as part of the Terms and Conditions normally presented by tour operators.

15. Identify four effective options for addressing identified resource requirements in the short-term.

16. Identify four effective options for addressing identified resource requirements in the long-term.

17. Describe four factors affecting what resources are available for upcoming tours.

18. Describe three ways to assist with the coordination of resources for tours.

19. Many tours have special requests which need to be accommodated and while many of these are pre-planned in advance, many also require last-minute additions to the standard set of resources provided: in relation to these late inclusions identify three things to which attention must be paid.

20. Define ‘variable resources’ identifying factors which might cause them to vary.

21. List four practical considerations which must be taken into account in relation to meeting budget limitations when allocating tour resources.

22. Name four ways to notify others in regard to information about resource allocations to tours.

23. Describe eight activities which may be involved in issuing physical resources to tours.

24. Name four records which may need to be completed when physical resources are issued to tours.

25. In relation to tours define ‘remote supply’.

26. Explain why remote supply may be required identifying items which may need to be provided.

27. Give three reasons resources may be provided to tours using third party providers.

28. Give four reasons to verify the supply of resources to tours.

29. Describe four activities commonly involved in verifying supply of resources to tours.

30. Give five reasons tour operators perform calculations to compare resources used with revenue raised.

31. Give four reasons tour operators review actual conduct of tours and compare them with their expectations.

32. Identify four activities involved when reviewing and comparing actual conduct of tours with expectations.

33. Name four requirements which should apply to/precede the process of identifying and acquiring resources which need to be revised.

34. Name four options a tour operator may exercise to revise tour resources following their review.

35. Identify six documents which may need to be altered when changes to tour resources have been made.

Answers to written questions

Allocate tour resources –
D2.TTG.CL3.02
D2.TTO.CL4.01

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. What are the four classifications of resources necessary to allocate for tour operations?

- Physical
- Financial
- Human
- Information.

2. Name four ways a person can identify what resources might be needed on a tour.

- Research and read tour brochures and promotional materials
- Review contracts which relate to the tour
- Talk to others
- Read end-of-tour de-briefing reports from previous tours
- Refer to tour-specific resourcing sheets
- Read customer comments/feedback from previous tours
- Use common sense.

3. List eight factors that may determine resource requirements for a tour.

- Type of tour
- Location of tour
- Duration of tour
- Starting and finishing time of tour from the tour operator's premises
- Size of tour group
- Special needs and special requests
- Types of customers expected on tour
- External resources available
- Tour conditions
- Understanding activities, products and services advertised for the tour.

4. List the three classifications of colleagues who may be talked to discuss resource needs for tours.

- Management
- Administration
- Staff who have been on tour.

5. Identify four topics which might be talked about when discussing resource needs for tours with colleagues.

- Analysing of operational issues
- Considering how lack of resources impacts the tour and the tour group members
- Identifying emerging resource needs.

6. When considering previous tours which have been conducted name three generic areas which must be considered.

- Tour statistics
- Feedback
- Reportable events.

7. In relation to the allocation of tour resources give three reasons to undertake research and analysis of previous tours which have been conducted.

- Gain a frame of reference for comparison purposes
- Obtain actual examples of resources used for those tours
- Determine end-of-tour input from staff regarding suitability and sufficiency of resources provided.

8. Briefly explain the common law Duty of Care which all tour businesses must comply with.

- Create and maintain a workplace or (touring) environment that does not pose a risk to people (staff, members of the public, customers)
- Take action to avoid causing foreseeable harm to people/customers/tour group members or their property/belongings.

9. Identify six ways to identify safety and legal issues which may require compliance from the point of view of allocating resources for tours.

- Talk to management
- Seek advice from government-based ‘Health, safety and welfare’ agencies
- Search the web for information/requirements in other countries to be visited
- Ask industry bodies for their advice
- Speak with employees in other tour operating businesses who have responsibility for loading/allocating resources for tours
- Read advertising materials and/or contracts relating to the tour
- Undertake formal risk management activities as appropriate to the tour type and proposed inclusions/activities.

10. What are the three elements of a structured risk management process?

- Risk identification
- Risk analysis and assessment
- Risk management.

11. Describe four actions you might take to determine resource availability for an upcoming tour.

- Determine the items readily/currently available
- Review the tour schedule
- Review orders placed with suppliers
- Review third-party providers used by the tour operator for supplying goods and services when groups are on-tour
- Review items which are out-of-operation
- Review rosters
- Check relevant budgets.

12. In relation to a ‘one-off tour’ what MUST form the basis of determining specific resources required for the tour?

The contract coupled with discussions with the client and tour operator management.

13. Give three examples of factors which can indicate/dictate the need for differences to the standard allocation of resources to regular tours?

- Weather
- Time of day
- Special needs tour group members
- Changes to routes and inclusions.

14. Describe four statements which are contained in Exclusion clauses as part of the Terms and Conditions normally presented by tour operators.

- The operator can change the itinerary – at any time and at their discretion
- The organisation can change the vehicle/method of transport originally offered or advertised'
- The business can sub-contract advertised services to another operator in certain situations
- The tour business reserves the right to substitute nominated accommodation and/or catering arrangements
- No eligibility for discount, refund or cancellation is created when a change to an itinerary or inclusions occurs.

15. Identify four effective options for addressing identified resource requirements in the short-term.

- Imposing a short delay to the departure of the tour or the start of an activity
- Moving required resources from one place to another
- Obtaining required resources in the immediate short-term
- Contacting destinations and attractions and obtaining items from them
- Relying on the Terms and Conditions clauses in the Tour Contract/Agreements.

16. Identify four effective options for addressing identified resource requirements in the long-term.

- Acquire extra resources as identified – purchase or lease
- Service items
- Amend current standard tours
- Develop new tours.

17. Describe four factors affecting what resources are available for upcoming tours.

- Other tours currently being conducted at the time
- Level of physical stock-on-hand
- Tour schedules
- Cleaning requirements
- Servicing and maintenance requirements
- Staff development activities.

18. Describe three ways to assist with the coordination of resources for tours.

- Tour load sheets
- Workplace white board
- Restrictions on access by staff to store areas and inventory stocks
- JIT provision of resources.

19. Many tours have special requests which need to be accommodated and while many of these are pre-planned in advance, many also require last-minute additions to the standard set of resources provided: in relation to these late inclusions identify three things to which attention must be paid.

- Extra items are added to loading sheets as required
- Extra charges (where legitimate) are levied against tour group members so the business recoups money it has expended
- Good ideas for including these extra items as standard inclusions on other tours are captured and integrated elsewhere into the SOPs of the organisation
- Adjustments to existing plans are made where a last-minute inclusion for this tour has meant resources have been taken from stock/resources allocated to another tour.

20. Define ‘variable resources’ identifying factors which might cause them to vary.

- Variable resources are those which vary as the details of the trip vary.
- As the duration of the tour increases, the amount of resources required goes up – as duration falls so do the resources required
- As the number of tour group participants grows, so too does the need for more resources – as the number of participants drops so is there a corresponding reduction in resources required.

21. List four practical considerations which must be taken into account in relation to meeting budget limitations when allocating tour resources.

- Meet contracted demand/promises
- Ensure the standards and resources which applied to previous tours also apply to this/the next tours
- Guarantee the safety of all tour group members
- Consider adjusting resource allocation, where possible, to eliminate cost over-runs
- Search for the 'least worst' option
- Gain permission for budget over-runs where these simply cannot be avoided.

22. Name four ways to notify others in regard to information about resource allocations to tours.

- Face-to-face at daily staff meetings and/or to Tour Guides/Leaders when they return after a tour
- Via emails
- Using one of many popular hard-copy written formats
- Using an electronic database.

23. Describe eight activities which may be involved in issuing physical resources to tours.

- Separating the identified items from other stock available in the store area
- Removing identified items from storage ready for use/collection
- Counting items
- Inspecting items
- Notifying tour staff to come and collect items from the store
- Driving tour vehicles to the store area
- Loading items onto tour vehicles
- Stowing items in patrol boxes, tour wallets and other storage containers
- Refrigerating and freezing foodstuffs
- Rotating stock – which is usually done using the FIFO method of stock control where the first item taken into the store is the first one handed out when items are provided/distributed
- Spot cleaning
- Adhering to planned numbers and items
- Actively and physically controlling the issuing process.

24. Name four records which may need to be completed when physical resources are issued to tours.

- Internal requisitions sheets
- Internal transfer sheets
- Bin cards
- Database files and fields
- Checklists
- Receipts.

25. In relation to tours define ‘remote supply’.

Providing resources to a tour at a location other than the point of departure from the organisation is referred to as remote supplying.

26. Explain why remote supply may be required identifying items which may need to be provided.

- Re-supply or replenish the tour stocks – as they are depleted through regular/normal use or because there has been some emergency or problem situation
- Deliver required resources to the tour group at a pre-arranged location at a pre-arranged time – such as:
  - Camping gear for overnight stays
  - Food and beverages for meals
  - Fuel and spare parts for vehicles
  - Medical supplies
  - Gear, activity and safety/PPE equipment
  - Personal property and items for individual tour group members.

27. Give three reasons resources may be provided to tours using third party providers.

- Using local providers is often more effective and operationally efficient than buying all requirements beforehand, carrying them and using them when needed
- Resources bought on tour can often be less expensive than those purchased at the base of operations by the tour business
- They give 'local flavour' to the tour and add an extra dimension for tour group participants
- Use of third party providers can add an element of luxury and indulgence to a tour
- These providers are the only local options for the provision of items
- There may be a trade-off required by local operators or communities.

28. Give four reasons to verify the supply of resources to tours.

- Ensure the allocated resources have been provided as expected
- Determine whether or not more/different resources are required
- Check the quality and suitability of the items delivered/provided
- Help keep third party transport providers/carriers of resources honest
- Create a valid paper-trail of documentation.

29. Describe four activities commonly involved in verifying supply of resources to tours.

- Physically inspecting items
- Counting items
- Comparing items provided against supply documentation
- Signing to acknowledge receipt of items received
- Noting on the accompanying documents items not provided.

30. Give five reasons tour operators perform calculations to compare resources used with revenue raised.

- Determine business performance
- Provide a point of reference for comparing efficiency of resource usage between different staff members
- Contrast different tour types against each other
- Make various business/operational decisions
- Enable identification of ‘most’ and ‘least’ profitable tours
- Try to identify future need
- Classify and quantify future physical resources required.

31. Give four reasons tour operators review actual conduct of tours and compare them with their expectations.

- Determine level/degree of alignment between expectations and actual experience
- Decide where and/or if changes need to be made to:
  - Advertisements and/or promotions
  - Tour inclusions and activities
- Identify if an unexpected/unique selling point has emerged
- Evaluate the procedures used to design and develop tours
- Validate other data.

32. Identify four activities involved when reviewing and comparing actual conduct of tours with expectations.

- Soliciting feedback from tour group members
- Participating first-hand in a tour
- Requiring tour staff to provide structured input
- Analysing incident reports
- Reflecting on expectations
- Drawing on other industry experiences and related knowledge.

33. Name four requirements which should apply to/precede the process of identifying and acquiring resources which need to be revised.

- Must flow from a structured review process
- Has to occur within designated budget parameters
- Commonly requires specific authorisation
- Can require multiple quotations to be obtained for comparison purposes
- Might require trialling of resources prior to purchase
- Generally requires that only a limited/maximum number (or value) of stock is acquired at any one time
- May require purchases are:
  - Made from designated suppliers only – known as ‘preferred providers’
  - Bought before or after a certain date – to accommodate internal cash flow constraints
  - Lodged using a given purchasing protocol – such as online, using a sales representative, in-person, by telephone, via contract/tender process.

34. Name four options a tour operator may exercise to revise tour resources following their review.

- Buying more of the same resources
- Buying different brands/types of the same sort of resources
- Upgrading existing resources
- Buying new items never used before.

35. Identify six documents which may need to be altered when changes to tour resources have been made.

- Advertising material aimed at the general public/customers
- Internal information documentation
- Tour itineraries
- Tour schedules
- Tour checklists
- Tour resource stock sheets
- Duty allocations and rosters
- Plans and emergency responses.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Allocate tour resources D2.TTG.CL3.02 D2.TTO.CL4.01
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Determine resource requirements b) Allocate resources c) Review resource allocation 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1:Determine resource requirements		
Identify the factors that will determine resource requirements for a tour	❑	❑
Discuss resource needs with colleagues	❑	❑
Consider previous tours that have been conducted	❑	❑
Identify safety and legal issues that must be complied with	❑	❑
Determine availability of required resources	❑	❑
Identify specific resources for individual tours	❑	❑
Prepare short and long-term plans for resource acquisition	❑	❑

Did the candidate	Yes	No
Element 2: Allocate resources		
Coordinate the availability of physical resources	❑	❑
Match resources to identified tour requirements	❑	❑
Comply with budget limitations when allocating resources	❑	❑
Provide resource information and support to colleagues	❑	❑
Issue the identified physical resources as identified	❑	❑
Distribute physical resources to required locations	❑	❑
Arrange for third party supply of resources	❑	❑
Verify supply of appropriate and adequate resources with tour guide and other personnel	❑	❑
Element 3: Review resource allocation		
Compare resources used with budget and revenue raised	❑	❑
Review actual conduct of tour and compare with expectations	❑	❑
Identify resources that need to be revised for subsequent tours	❑	❑
Revise standard tour-related documentation	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no:**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Allocate tour resources D2.TTG.CL3.02 D2.TTO.CL4.01		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Identifies factors determining resources required for tours	❑	❑	❑
Determines resources need and availability for tours	❑	❑	❑
Selects tour resources to comply with safety and legal issues	❑	❑	❑
Obtains or organises identified tour resources	❑	❑	❑
Coordinates availability of tour resources matching resources to tour need	❑	❑	❑
Allocates and issues resources providing information and support to colleagues,	❑	❑	❑
Compares tour resources used to budget and revenue	❑	❑	❑
Reviews tours evaluating and analysing tour resource allocations and comparing outcomes with expectations	❑	❑	❑
Determines matters to be revised for future tours including revisions to standard tour-related documentation	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Allocate tour resources	D2.TTG.CL3.02 D2.TTO.CL4.01
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Determine resource requirements						
Identify the factors that will determine resource requirements for a tour						
Discuss resource needs with colleagues						
Consider previous tours that have been conducted						
Identify safety and legal issues that must be complied with						
Determine availability of required resources						
Identify specific resources for individual tours						
Prepare short and long-term plans for resource acquisition						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 2: Allocate resources						
Coordinate the availability of physical resources						
Match resources to identified tour requirements						
Comply with budget limitations when allocating resources						
Provide resource information and support to colleagues						
Issue the identified physical resources as identified						
Distribute physical resources to required locations						
Arrange for third party supply of resources						
Verify supply of appropriate and adequate resources with tour guide and other personnel						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Review resource allocation						
Compare resources used with budget and revenue raised						
Review actual conduct of tour and compare with expectations						
Identify resources that need to be revised for subsequent tours						
Revise standard tour-related documentation						

Candidate signature:		**Date:**	
Assessor signature:		**Date:**	

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