Conduct pre-departure checks

D2.TTG.CL3.04
D2.TTO.CL4.04

Assessor Manual

Specialist centre for foods, tourism & hospitality

Conduct pre-departure checks

D2.TTG.CL3.04
D2.TTO.CL4.04

Assessor Manual

Project Base

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

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Table of contents

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

<table>
<tr><td>UNIT TITLE: CONDUCT PRE-DEPARTURE CHECKS</td><td>NOMINAL HOURS: 50</td></tr>
<tr><td colspan="2">UNIT NUMBER: D2.TTG.CL3.04 D2.TTO.CL4.04</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to identify, prepare, check and load equipment and supplies necessary for a tour prior to departure.</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>Element 1: Identify tour requirements
1.1 Identify itinerary for the tour
1.2 Identify group numbers on the tour
1.3 Identify supplies that can be obtained on tour
1.4 Identify special needs for the tour
1.5 Identify budget for equipment and supplies for the tour
1.6 Determine final requirements for the tour
Element 2: Prepare identified tour requirements
2.1 Obtain identified equipment and supplies
2.2 Check condition of equipment and supplies
2.3 Confirm quantity of equipment and supplies</td><td>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 identify, prepare, check and load equipment and supplies, necessary for a tour prior to departure, within the labour divisions of the hotel and travel industries and may include:
1. Tour Operation
Identify itinerary will include:
• Specifying locations to be visited including sites, areas/regions, towns and venues/attractions
• Establishing nature and purpose of the tour
• Identifying duration including departure and arrival dates, days and nights away and specific timing considerations
• Listing potential support services and suppliers involved including those who will share in providing equipment and supplies for the tour and/or nominated aspects of it.</td></tr>
</table>

2.4 Ensure compliance with *host enterprise protocols for equipment and supplies* **2.5** Acquire additional equipment and supplies, where needed **2.6** *Verify identified equipment and supplies with tour staff* **2.7** Develop checklist of all equipment and supplies for use when loading and while on tour **Element 3: Load identified tour requirements** **3.1** *Prepare loading sheet* for each vehicle or form of transport to be used **3.2** *Stow equipment and supplies* **3.3** Use checklist/s to ensure all equipment and supplies are loaded **3.4** *Conduct final check* of all vehicles, equipment and supplies **Element 4: Complete documentation** **4.1** *Finalise checklists and supply sheets* **4.2** Provide *tour-related documents* to guides and tour leaders **4.3** *Forward documentation* to external suppliers **4.4** Finalise *documentation for tour members* **4.5** Update *internal inventory and stock control records*	*Identify group numbers* will include: • Listing the number of tour members/participants including identification of those who will depart and/or join the tour along the way • Differentiating between and quantifying individual classifications of tour members including men and women, infants, children and adults of different age groups • Assessing potential usage of participants for each activity, at each location and for every service and/or product advertised. *Supplies that can be obtained on tour* may be related to: • Undertaking a cost-benefit analysis regarding the decision to take supplies, or buy them *en route* • Verifying availability of supplies identified for purchase *en route* • Ensuring cash, credit or pre-paid arrangements have been made with identified suppliers. *Identify special needs* may include: • Factoring in variations to standard equipment and supplies traditionally packed for similar tours • Purchasing additional or new equipment and supplies • Accommodating the needs of special needs customers including disabled, elderly, children and infants • Meeting promises in regard to service delivery on tour. *Identify budget* should relate to: • Ensuring equipment and supplies remain within given budget parameters for the tour • Clarifying the situation regarding special purchases that need to be made including passing on costs to tour members, claiming back all legitimate expenditure from the tour group and understanding the terms and conditions of the tour.

	Equipment and supplies may include: • Camping and catering equipment • Maintenance, recreational, educational and communication equipment • Materials to support interpretive activities • Fuel • Water • Food and beverages • Luggage • Medical and first aid items • Commercial cargo, where applicable • Cash, vouchers and various authorities to act and/or make purchases on behalf of the host enterprise. *Determine final requirements* will include: • Combining information known about the tour including itinerary, type of tour, duration, activities, type of participants and numbers to calculate equipment and supplies by name and quantity • Confirming estimate with tour personnel • Double-checking calculations and determinations • Comparing identified requirements with documentation from previous similar tours, where applicable • Including a safety factor margin by quantity/amount for nominated important items of equipment and supplies. *Obtain identified equipment and supplies* may include: • Retrieving items from storage

	• Moving items between tour groups • Ordering and purchasing items. *Check condition of equipment and supplies* may relate to: • Ensuring items meet safety standards • Verifying operational readiness • Providing repairs and services • Rejecting suspect or inappropriate items • Verifying use-by dates for food and beverages • Conducting test-runs on items • Inspecting items. *Host enterprise protocols for equipment and supplies* may include: • Pre-determined ratios stipulating amount of equipment and/or supplies for every tour group member while on tour • Checklists to be used when checking equipment and supplies • Non-negotiable requirements for equipment and supplies to enable safety, communication, security, cooking, transport and accommodation needs for the tour. *Verify identified equipment and supplies with tour staff* may include: • Undertaking a paper-based final consideration of manifest for equipment and supplies • Conducting a physical count and inspection of equipment and supplies that have been assembled for the tour • Holding a final planning session to identify last minute requirements • Preparing, or modifying, contingency plans to cope with emergencies and unexpected problems.

	Prepare loading sheet may include:
	• Identifying equipment and supplies stowed on each vehicle, or method of transport to be used
	• Identifying where within each vehicle, or method of transport to be used, equipment and supplies are located
	• Undertaking calculations and deliberations to:
	  ▪ Distribute weight evenly between and within vehicles
	  ▪ Share equipment and supplies between vehicles to minimise loss in the event of an accident
	  ▪ Ensure safe storage of equipment and supplies.
	Stow equipment and supplies refers to the physical loading of equipment and supplies into or onto each vehicle or method of transport to be used and must include:
	• Complying with safe manual handling techniques
	• Complying with weight restrictions including vehicles and animals
	• Taking into account the terrain to be covered and the potential for items to shift during transit
	• Enabling ready access to equipment and items that will be required first and/or required in the event of an emergency
	• Following legislated and/or host enterprise procedures for the stowing of hazardous items which may include:
	  ▪ Sharp tools or equipment
	  ▪ Heavy items
	  ▪ Items made of or containing glass
	  ▪ Gas containers
	  ▪ Heat-sensitive aerosols

	▪ Medication ▪ Petrol, fuel and other flammable materials • Securing equipment and supplies to prevent movement, as far as practicable. *Conduct final check* may include: • Familiarising staff with location of equipment and supplies within individual vehicles • Advising staff in relation to special precautions that have been taken including training so they may duplicate these processes *en route* • Double-checking that checklists have been completed as required and that all required equipment and supplies have been loaded • Visually inspecting the load and the vehicles for problem signs including leakages from supplies, behaviour of vehicles on the road/in the water, protrusions outside the vehicle • Ensuring comfort and safety for those who may be travelling in vehicles that have been packed with equipment and supplies. *Finalise checklists and supply sheets* may include: • Obtaining signatures from tour guides and tour leaders to acknowledge receipt of the equipment and supplies • Dating and adding specific tour group information to the sheets • Photocopying loading sheets for tour guides and tour leaders. *Tour-related documents* will vary depending on the type of tour and may include: • Loading sheets • Manufacturer’s instructions for equipment • Repair manuals • Warranties and guarantees relating to new items purchased for the tour • Copies of standard operating procedures and contingency plans

	• Itineraries including tour itinerary and operational itinerary • Maps • Passenger lists • Rooming lists • Passenger profiles • Details of special requests • Handout material for distribution at nominated locations, sites and interpretive activities • Tour brief • Catering information including meal schedules and recipes. *Forward documentation* may include: • Ensuring purchase orders and other contractual arrangements have been provided to and received by third party suppliers • Sending final details and confirmation regarding numbers and names of tour group members including identification of age, special requests • Ensuring required authorisations and permits have been finalised • Submitting touring plans to authorities and/or local communities, as required. *Documentation for tour members* may include: • Permits • Vouchers • Name tags • Informational material • Itinerary • Terms and conditions of tour

	• Advice regarding the destinations, dangers and details of the tour • Expectations in regard to behaviour while on tour • Advice regarding the authority of the tour guide and the tour leaders while on tour. *Internal inventory and stock control records* relate to either manual or electronic stock records and accounting requirements and may include: • Requisitions • Stock take sheets • Bin cards • Purchase orders • Receipts • Invoices, statements and credit notes • Damaged goods sheets • Returned goods. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Enterprise policies and procedures in regard to equipment and supplies required for tours, and the preparing of such equipment in readiness for touring • Principles of supply systems, practices and logistics • Ability to use arithmetic techniques to calculate statistical requirements • Knowledge of the area and conditions to be toured • Ability to identify hazardous goods • Ability to apply safe manual handling techniques

	• Knowledge of goods such as foods, beverages and other items that are prohibited by law or custom in touring areas • Ability to interpret and apply standing and contingency plans. **Critical Aspects of Assessment** Evidence of the following is essential: • Understanding of principles for provisioning a tour party • Demonstrated ability to identify the equipment and supplies, by type/name and quantity, required to support the conduct of a nominated tour for a given itinerary in accordance with supplied details of the tour group including numbers, composition and special requests • Demonstrated ability to identify the pre-departure checks that should be made to every item of equipment and all supplies listed as being necessary to support the safe and effective conduct of a nominated tour • Demonstrated ability to pack, load and effectively secure a nominated range and quantity of tour-related equipment and supplies onto/into designated vehicles/means of transport in preparation for a tour departure • Demonstrated ability to describe the actions that should occur to complete all necessary internal and external documentation for a nominated tour. **Context of Assessment** This unit may be assessed on or off the job: • Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge • Assessment must relate to the individual's work area or area of responsibility • Take into account the limitations imposed on competency-based assessment by virtue of the financial and resource constraints faced by training providers and workplaces.

	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. Note: a representative but not exhaustive range of equipment and supplies must be available to support demonstration of competency. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Simulated exercises including physical inspection of vehicles that have been loaded • Portfolio of on-tour documentation relating to equipment and supplies, internal stock management/control documentation and external authorisations • 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	Interpret tour-related documents to determine equipment and supply requirements for a tour
Communicating ideas and information	1	Discuss tour needs with tour guides and tour leaders
Planning and organising activities	1	Determine the loading sheets for vehicles

	Working with others and in teams	1	Liaise with staff and suppliers to determine requirements
	Using mathematical ideas and techniques	1	Calculate costs and volumes/quantities
	Solving problems	1	Overcome equipment and supply shortages, malfunctions and deficiencies
	Using technology	1	Use calculator; use equipment to test its readiness and suitability for use

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Conduct pre-departure checks D2.TTG.CL3.04 D2.TTO.CL4.04
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 do you do to identify the itinerary for a tour you are required to provide service to? Why is identifying the itinerary important?	❑	❑
2. Why is it important to identify the group numbers on a trip for which you have to prepare/conduct pre-departure checks?	❑	❑

Questions	Response	
	PC	NYC
3. How might you determine the supplies a tour can obtain while on-tour and why is this important?	❑	❑
4. Why do you need to identify special needs for a tour for which you have responsibility for providing resources?	❑	❑
5. What have you done to identify the budget available for tours you have needed to provide supplies and equipment for?	❑	❑

Questions	Response	
	PC	NYC
6. Identify a tour and describe the final requirements which applied for that tour.	❑	❑
7. Name a tour and tell me the equipment and supplies required for that tour.	❑	❑
8. What is involved in checking the condition of equipment and supplies provided for a tour?	❑	❑

Questions	Response	
	PC	NYC
9. How do you confirm the quantity of equipment and supplies required for a tour?	❑	❑
10. Tell me about host enterprise protocols for equipment and supplies you have had to comply with. What were they and why were they in place?	❑	❑
11. Give me examples of additional equipment and supplies you have had to obtain for a tour. How did you become aware that there was a need to do this?	❑	❑

<table>
<tr><th rowspan="2">Questions</th><th colspan="2">Response</th></tr>
<tr><th>PC</th><th>NYC</th></tr>
<tr><td>12. Explain how you verify identified equipment and supplies with tour staff prior to departure of a tour.</td><td>❑</td><td>❑</td></tr>
<tr><td>13. What use have you made of ‘checklists’ when preparing for a tour departure?</td><td>❑</td><td>❑</td></tr>
<tr><td>14. What is a ‘loading sheet’ and how have you used one?</td><td>❑</td><td>❑</td></tr>
</table>

Questions	Response	
	PC	NYC
15. Describe what you did when stowing items for a tour; what was the tour and vehicle? What were the supplies and equipment which you needed to load?	❑	❑
16. How did you use checklists to support the loading of items before the departure of a tour?	❑	❑
17. Give me an example of the final checks you would undertake before the departure of a tour.	❑	❑

Questions	Response	
	PC	NYC
18. Describe how you finalise the completion of checklists and supply sheets before the departure of a tour.	❑	❑
19. What tour-related documents have you provided to guides and tour leaders prior to tour departure? What were these documents needed for?	❑	❑
20. What documentation have you needed to forward to external suppliers? Why?	❑	❑

Questions	Response	
	PC	NYC
21. Explain the procedures and documents involved in finalising host enterprise documentation for tour members before the departure of a tour.	❑	❑
22. What is involved in updating inventory and stock records after providing equipment and supplies to a departing tour? Why is this task important?	❑	❑

Written questions

Conduct pre-departure checks – D2.TTG.CL3.04
D2.TTO.CL4.04

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. Give four reasons pre-departure checks are conducted.

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2. What is an ‘itinerary’ and who is it provided to?

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3. Identify four ways a worker can obtain the itinerary for a trip/tour.

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4. Name four ways to identify numbers of people on a trip/tour.

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5. List four reasons it is important to determine tour group members for a trip/tour.

6. Give four reasons a tour operator might use third party providers to supply resources for a trip tour.

7. List four ways to identify potential third party providers for trips/tours.

8. Name three broad classifications of 'special needs' customers.

9. Name four SOPs to address the requirements which may arise in relation to those with special needs.

10. Name four of the factors which provide the basis for the budget for a trip/tour.

11. List three ways the budget for private or custom tours may be identified.

12. What must always happen before supplying more resources to a trip/tour than are officially allocated to that trip/tour?

13. Name three activities required/involved determining final requirements for a trip/tour.

14. What is the standard stock control principle applied to tour stocks/supplies?

15. What are identified in the notes as the ‘two key aims’ in the process of obtaining identified equipment and supplies for trips/tours?

16. Name four activities which will help to achieve the two key aims in the process of obtaining identified equipment and supplies for trips/tours.

17. Name four activities involved in inspecting/checking the condition of equipment and supplies for trips/tours.

18. Describe four actions to help ensure the required amount of resources is provided to match identified requirements for trips/tours.

19. What is the name of the internal document used to order/support the taking of items from the store to trips/tours so administration can track their use for calculating financial performance of each trip/tour?

20. Is compliance with host enterprise protocols 'mandatory' or 'optional'?

21. Describe three short-term responses to address immediate need for extra resources for a trip/tour.

22. Name four long-term responses to resource shortages for trips/tours.

23. Who is involved in the final planning session for a larger trip tour? When is the meeting held and what are the objectives of this meeting?

24. What are contingency plans? Why are they prepared and what is involved in confirming contingency plans for trips tours?

25. Name four generic uses for Checklists in relation to pre-departure checks.

26. Identify four roles of the Loading sheet.

27. Describe four basic activities in preparing loading sheets.

28. What is meant by 'stowing' supplies and equipment?

29. Name four important considerations when stowing equipment and supplies.

30. Give four examples of activities involved in using the checklist/loading sheet to ensure supplies/equipment are loaded onto tour vehicles.

31. Describe four practices used to complete final checking of vehicles, supplies and equipment for a trip/tour.

32. List six activities/tasks which may need to be undertaken when finalising internal documentation for a trip/tour.

33. Identify six documents that may be provided to tour staff/guides/leaders prior to tour departure.

34. Describe four activities possibly required to ensure required products and services are made available to trips/tours by external suppliers, authorities or communities.

35. Name four types of tour member documents which may need to be finalised before a trip/tour.

36. Describe three ways completed tour member documents may be distributed prior to a trip/tour.

37. Give four reasons internal records of the organisation must be updated in relation to trips/tours which have departed.

38. Identify four types of documents which may need to be updated after a trip/tour has departed.

Answers to written questions

Conduct pre-departure checks – D2.TTG.CL3.04
D2.TTO.CL4.04

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. Give four reasons pre-departure checks are conducted.

To:

- Ensure the tour runs smoothly
- Meet customer expectations
- Discharge Duty of Care and other legal obligations
- Make sure all necessary items are loaded for the tour
- Support tour guides and other tour staff.

2. What is an 'itinerary' and who is it provided to?

- An itinerary is the plan for a trip or tour
- An itinerary is commonly provided for every tour/trip (and all travel) sold and provided to the client/tour group member.

3. Identify four ways a worker can obtain the itinerary for a trip/tour.

- Speak to management – who will advise what is happening/required
- Refer to standard trip details – where the trip is a normal tour
- Look at the client file – where the tour is customised or is a private trip
- Talk to other staff – this involves speaking with employees who have worked on/with previous similar trips/tours.

4. Name four ways to identify numbers of people on a trip/tour.

- Counting tickets/places sold
- Checking the client file
- Speaking with management
- Tour and counter staff.

5. List four reasons it is important to determine tour group members for a trip/tour.

To determine:

- The number of tour members/participants – in total
- Those who will depart and/or join the tour along the way
- Classification and quantification of nominated group on the trip
- Potential usage of participants.

6. Give four reasons a tour operator might use third party providers to supply resources for a trip tour.

- 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.

7. List four ways to identify potential third party providers for trips/tours.

- Speak to tour staff – who have experience in the relevant areas to be visited to see what they know about what is available and who may be able to supply
- Read the details of any arrangements entered into with local communities – which necessitate purchasing certain items/services from them as part of the deal in relation to accessing their area/land
- Conduct internet searches – using appropriate key words to refine the searches
- Use region-specific telephone books – to identify relevant businesses in the areas
- Talk to competitors who conduct trips/tours in the areas – to identify who they use and to learn from what they do
- Go to the regions/areas and visit potential providers – taste and test their products and services.

8. Name three broad classifications of 'special needs' customers.

- Are disabled – mentally or physically
- Have language limitations – and cannot speak/understand the local language
- Need any type of special assistance – such as:
  - Children travelling alone – known as UAMs
  - Elderly – who might need help with luggage/transfers
  - People travelling with service dogs/animals.

9. Name four SOPs to address the requirements which may arise in relation to those with special needs.

- Check the 'Special request' forms for the tour
- Read the contracts which have been prepared for customised and private tours
- Adjust the standard provisioning for the trip/tour by supplying/loading necessary items as identified by the pre-tour notifications'
- Complete necessary internal documentation to reflect action taken to address special needs
- Pass on the identified special needs information to tour staff.

10. Name four of the factors which provide the basis for the budget for a trip/tour.

- Previous experience with similar trips/tours and general industry experience
- Prices charged – to the tour group members/customers
- Promises made about what will be provided – in advertisements and contracts/agreements
- Need to meet legally-imposed obligations – in relation to health, safety, security and other applicable issues
- Need to provide value-for-money to participants – so the trip/tour gains a good reputation which will enhance the potential for repeat and referral business
- Need to meet what the opposition is doing – so the trip/tour becomes a remains a viable option for customers
- Need for the organisation to generate a profit – to sustain the business and maintain and grow jobs.

11. List three ways the budget for private or custom tours may be identified.

- Reading the client file for the individual tour
- Talking to management
- Speaking with the sales staff/consultants who negotiated the deal for the trip/tour.

12. What must always happen before supplying more resources to a trip/tour than are officially allocated to that trip/tour?

Answer must address:

- Need to apply for and obtain permission to do so from management or administration.

13. Name three activities required/involved determining final requirements for a trip/tour.

- Double-checking what has already been done – essentially a verification process
- Communicating preparation activities to relevant others
- Actively searching/asking about last-minute changes and/or special requests
- Obtaining approval for planned resourcing and preparation actions to be implemented.
- Confirming numbers
- Checking what has already been done
- Talking to tour staff – to confirm arrangements and get their input and feedback
- Being alert to the ever-present need for last-minute changes.

14. What is the standard stock control principle applied to tour stocks/supplies?

FIFO - First In First Out.

15. What are identified in the notes as the 'two key aims' in the process of obtaining identified equipment and supplies for trips/tours?

- Physically acquire required resources
- Determine if additional items need to be ordered or purchased.

16. Name four activities which will help to achieve the two key aims in the process of obtaining identified equipment and supplies for trips/tours.

- Retrieve items from storage
- Rotate stock
- Record movement of stock
- Move items between tour groups
- Transport items
- Order and purchase new items.

17. Name four activities involved in inspecting/checking the condition of equipment and supplies for trips/tours.

- Visually checking each item
- Spot cleaning of items
- Providing basic repairs
- Checking dates for food and beverages
- Verifying wrapping and packaging of food
- Ensuring items meet safety standards
- Rejecting suspect, defective, unsafe or otherwise inappropriate items.

18. Describe four actions to help ensure the required amount/number of resources is provided to match identified requirements for trips/tours.

- Count each item
- Weight items/products
- Match items to group numbers
- Open closed boxes/cartons to confirm content/numbers inside
- Physically segregate items which have been obtained and counted.

19. What is the name of the internal document used to order/support the taking of items from the store to trips/tours so administration can track their use for calculating financial performance of each trip/tour?

Requisition sheet.

20. Is compliance with host enterprise protocols 'mandatory' or 'optional'?

Mandatory.

21. Describe three short-term responses to address immediate need for extra resources for a trip/tour.

- Move required resources from one place/vehicle to another
- Source required resources from a supplier or a competitor
- Contact destinations and attractions to determine what they can provide.

22. Name four long-term responses to resource shortages for trips/tours.

- Acquire extra resources as identified – buy or lease
- Service damaged items
- Amend current standard tours to accommodate what is available
- Develop new tours to accommodate what is available.

23. Who is involved in the final planning session for a larger trip tour? When is the meeting held, and what are the objectives of this meeting?

- For larger trips/tours there is usually a final planning session held two to three days before departure to identify last-minute requirements. This is:
  - A meeting with all tour staff
  - A detailed review of the itinerary – matching all projected activities against 'resources required' (by type and quantity) for each activity on an activity-by-activity basis
- The objectives of the meeting are to:
  - Confirm resources provided will actually meet resources required
  - Identify deficiencies and need for extra/different resources.

24. What are contingency plans? Why are they prepared and what is involved in confirming contingency plans for trips tours?

- They are Plan B
- They are prepared to give guidance to tour staff about what to do in the event planned itinerary cannot be implemented as planned
- Confirming contingency plans for a trip/tour generally requires:
  - Reviewing existing plans
  - Modifying/adapting existing plans as applicable to reflect updated circumstances and/or known factors
  - Re-writing/revising plans – or creating new ones – and incorporating them into the Operations Package/Folder.

25. Name four generic uses for Checklists in relation to pre-departure checks.

- Make sure all required items are supplied
- Resources are provided (only) in the required quantity
- Prove the listed items were delivered/supplied as listed
- Verify the condition of the items – the checklists provide a method by which sub-standard or deficient items can be recorded ('Missing' or 'Not Supplied')
- Provide a basis for checking off items when the tour returns
- Enable calculation of 'stock used' by each trip/tour for the purposes of determining the financial performance of each trip/tour
- Vehicle inspections
- Checking food and beverages
- A pre-departure checklist identifying, in sequential order, the tasks to be undertaken before a trip/tour leaves
- Checklists within checklists.

26. Identify four roles of the Loading sheet.

They:

- Are prepared internally by each operator – a template document usually exists on a computer and it is:
  - Printed off as required
  - Filled in (often by-hand) for each trip tour
- Are lists of equipment and supplies to be loaded onto individual vehicles on a tour-by-tour basis – identifying items by:
  - Type
  - Quantity
- Are used to guide/govern actual loading of items into/onto vehicles
- Are usually multipage documents – that is, each loading sheet for each vehicle for each trip/tour often comprises two-plus sheets which are stapled together
- Provide a record of items loaded for each trip/tour:
  - For record-keeping purposes
  - For calculating financial performance
  - For reference by tour staff
- Form the basis for ensuring all trips/tours depart with all necessary materials and can fulfil all applicable promises and obligations and meet all tour party expectations.

27. Describe four basic activities in preparing loading sheets.

- Printing in blank copies of the pro forma list/s
- Writing in goods allocated for loading
- Identifying where within each vehicle, or method of transport to be used, equipment and supplies are located
- Undertaking calculations and deliberations to determine weight and allocation of items/supplies.

28. What is meant by ‘stowing’ supplies and equipment?

Loading supplies and equipment.

29. Name four important considerations when stowing equipment and supplies.

- Prepared loading sheets must form the basis for actual loading
- Complying with approved manual handling techniques
- Complying with weight restrictions
- Taking into account tour-specific requirements
- Enabling ready access to certain equipment and items
- Following legislated/host enterprise procedures for stowing hazardous items
- Securing equipment and supplies.

30. Give four examples of activities involved in using the checklist/loading sheet to ensure supplies/equipment are loaded onto tour vehicles.

- Meeting with tour staff to conduct the check
- Photocopying loading sheets which were completed as part of the loading process
- Handling any last-minute requirements
- Verifying/inspecting items as necessary/appropriate to the nature of each item
- Adjusting the loading sheets
- Signing-off and dating the loading sheets.

31. Describe four practices used to complete final checking of vehicles, supplies and equipment for a trip/tour.

- Providing all tour staff with their own copy of the loading sheets
- Familiarising tour staff with location of equipment and supplies within individual vehicles
- Notifying staff in relation to special precautions that have been taken
- Taking vehicle for a shake-down run
- Visually inspecting the load and the vehicles for problem signs
- Double-checking Loading sheets have been completed as required
- Ensuring comfort and safety for those who may be travelling in vehicles that have been packed with equipment and supplies.

32. List six activities/tasks which may need to be undertaken when finalising internal documentation for a trip/tour.

- Obtaining signatures from tour guides and tour leaders – to acknowledge receipt of the equipment and supplies
- Photocopying loading sheets – so one copy per staff member can be distributed at the pre-tour briefing to tour guides, leaders, drivers
- Dating and adding specific tour group information to the sheets – as specific to each trip/tour
- Adding missing facts and figures – not previously provided/identified
- Entering cost prices of items – from a nominated source, catalogue, internal database or invoice
- Performing basic arithmetic calculations
- Forwarding completed documents – for further internal processing
- Filing – for future reference.

33. Identify six documents that may be provided to tour staff/guides/leaders prior to tour departure.

- Loading sheets
- Manufacturer's instructions for equipment loaded
- Repair manuals for vehicles and equipment
- Warranties and guarantees relating to new items purchased and provided
- Copies of standard operating procedures
- Standard (and/or modified as required for the individual trip/tour) response plans
- Tour itinerary and Operational itinerary
- Maps
- Passenger lists
- Rooming lists
- Passenger profiles
- Details of special requests
- Handout material
- Tour brief
- Catering information.

34. Describe four activities possibly required to ensure required products and services are made available to trips/tours by external suppliers, authorities or communities.

- Confirm contractual and arrangements and similar agreements which have been agreed to – which may require forwarding of a copy of these to the suppliers
- Ensure correct Purchase Orders are raised – and appropriately signed to authorise purchases
- Ensure properly prepared Purchased Orders are sent to the appropriate suppliers
- Complete an online PO as provided on the website of the provider
- Provide additional information relevant to the actual purchase – as/if required, for example:
  - Sending final details and confirmation regarding numbers and names of tour group members
  - Providing room share arrangements to accommodation venues
  - Advising catering suppliers of special food/diet needs based on health, religion or custom/culture needs or lifestyle preferences
- Ensure required authorisations and permits have been finalised – which will often require:
  - Lodgement of a formal application on an official form
  - Provision of nominated details/information
  - Payment of a fee
- Submit touring plans – where required to authorities and/or local communities in order to:
  - Advise them of upcoming movement/events
  - Seek permission/s
  - Show respect
  - Meet agreed Codes of Practice/Conduct.

35. Name four types of tour member documents which may need to be finalised before a trip/tour.

- Permits
- Vouchers
- Name tags
- Standard tour-related Informational material
- Organisational merchandise and other tour/trip-related items.

36. Describe three ways completed tour member documents may be distributed prior to a trip/tour.

- Loading of items onto the tour vehicle/s
- Placing completed 'packs' in location for tour staff to collect when needed
- Handing items over in-person to designated tour staff
- Distributing the items to tour members – on arrival/as they board
- Forwarding items to tour members (by mail, electronically, courier or by hand) prior to departure date.

37. Give four reasons internal records of the organisation must be updated in relation to trips/tours which have departed.

- Manage the size of the inventory
- Ensure the organisation does not run out of stock
- Facilitate stock management and control
- Help ensure stock is rotated correctly.

38. Identify four types of documents which may need to be updated after a trip/tour has departed.

- Requisitions
- Stock take sheets
- Bin cards
- Purchase orders
- Receipts
- Supplier-related documentation – such as:
  - Delivery dockets and Invoices
  - Statements
  - Credit notes
- Damaged goods sheets
- Returned goods.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Conduct pre-departure checks D2.TTG.CL3.04 D2.TTO.CL4.04
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Identify tour requirements b) Prepare identified tour requirements c) Load identified tour requirements d) Complete documentation 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: Identify tour requirements		
Identify itinerary for the tour	❑	❑
Identify group numbers on the tour	❑	❑
Identify supplies that can be obtained on tour	❑	❑
Identify special needs for the tour	❑	❑
Identify budget for equipment and supplies for the tour	❑	❑
Determine final requirements for the tour	❑	❑

Did the candidate	Yes	No
Element 2: Prepare identified tour requirements		
Obtain identified equipment and supplies	❑	❑
Check condition of equipment and supplies	❑	❑
Confirm quantity of equipment and supplies	❑	❑
Ensure compliance with host enterprise protocols for equipment and supplies	❑	❑
Acquire additional equipment and supplies, where needed	❑	❑
Verify identified equipment and supplies with tour staff	❑	❑
Develop checklist of all equipment and supplies for use when loading and while on tour	❑	❑
Element 3: Load identified tour requirements		
Prepare loading sheet for each vehicle or form of transport to be used	❑	❑
Stow equipment and supplies	❑	❑
Use checklist/s to ensure all equipment and supplies are loaded	❑	❑
Conduct final check of all vehicles, equipment and supplies	❑	❑
Element 4: Complete documentation		
Finalise checklists and supply sheets	❑	❑
Provide tour-related documents to guides and tour leaders	❑	❑
Forward documentation to external suppliers	❑	❑
Finalise documentation for tour members	❑	❑
Update internal inventory and stock control records	❑	❑
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:	Conduct pre-departure checks D2.TTG.CL3.04 D2.TTO.CL4.04		

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 details of and requirements for tour	❑	❑	❑
Obtains, prepares and checks equipment, supplies and resources for allocation to tours	❑	❑	❑
Ensures compliance with internal protocols for tour supplies and resources	❑	❑	❑
Checks ,loads/stows equipment and supplies for tours	❑	❑	❑
Uses checklists to record actions and ensure compliance	❑	❑	❑
Completes, finalises and forwards necessary internal paperwork as required	❑	❑	❑
Updates stock and stock records as needed	❑	❑	❑

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	Conduct pre-departure checks	D2.TTG.CL3.04 D2.TTO.CL4.04
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: Identify tour requirements						
Identify itinerary for the tour						
Identify group numbers on the tour						
Identify supplies that can be obtained on tour						
Identify special needs for the tour						
Identify budget for equipment and supplies for the tour						
Determine final requirements for the tour						
Element 2: Prepare identified tour requirements						
Obtain identified equipment and supplies						
Check condition of equipment and supplies						
Confirm quantity of equipment and supplies						
Ensure compliance with host enterprise protocols for equipment and supplies						
Acquire additional equipment and supplies, where needed						
Verify identified equipment and supplies with tour staff						
Develop checklist of all equipment and supplies for use when loading and while on tour						

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: Load identified tour requirements						
Prepare loading sheet for each vehicle or form of transport to be used						
Stow equipment and supplies						
Use checklist/s to ensure all equipment and supplies are loaded						
Conduct final check of all vehicles, equipment and supplies						
Element 4: Complete documentation						
Finalise checklists and supply sheets						
Provide tour-related documents to guides and tour leaders						
Forward documentation to external suppliers						
Finalise documentation for tour members						
Update internal inventory and stock control records						
Candidate signature:			**Date:**			
Assessor signature:			**Date:**			

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