# Co-ordinate and operate a day-tour (or short excursions)

## D2.TTG.CL3.05

## Assessor Manual

Australian Aid

asean

William Angliss Institute

Specialist centre for foods, tourism & hospitality

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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 colspan="2">UNIT TITLE: CO-ORDINATE AND OPERATE A DAY-TOUR (OR SHORT EXCURSIONS)</td><td>NOMINAL HOURS: 60</td></tr>
<tr><td colspan="3">UNIT NUMBER: D2.TTG.CL3.05</td></tr>
<tr><td colspan="3">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to conduct a one-day tour or short excursion involving multiple products and services to multiple sites.</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td colspan="2">UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>Element 1: Prepare for the tour<br>1.1 Identify the type of tour to be conducted<br>1.2 Interpret briefing information from the tour operator<br>1.3 Describe the specific issues to be considered to ensure customer needs are met<br>1.4 Liaise with colleagues<br>1.5 Identify potential risks for the tour<br>1.6 Identify and obtain specific resources for individual tours<br>1.7 Develop plans for the tour<br>1.8 Stow equipment and supplies for the tour<br>Element 2: Conduct the tour<br>2.1 Brief customers about tour</td><td colspan="2">Unit Variables<br>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.<br>This unit applies to a tour guide conducting a one-day tour or short excursion involving multiple products and services to multiple sites, within the labour divisions of the hotel and travel industries and may include:<br>1. Tour Operation<br>Type of tour may be related to:<br>• Half and full day tours<br>• City or rural tours<br>• Cultural tours or eco-tours<br>• Adventure tours<br>• Special interest tours.</td></tr>
</table>

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| **2.2** *Commence tour*<br>**2.3** *Follow itinerary* for the tour<br>**2.4** Provide *additional information and assistance*<br>**2.5** *Engage with industry colleagues* during the tour<br>**2.6** *Respond to issues arising* while on tour<br>**2.7** *Deal with unexpected events and emergencies*<br>**2.8** *Conclude tour* as planned<br>**Element 3: Complete post-tour activities**<br>**3.1** Complete *tour report and documentation*<br>**3.2** *Process cash, vouchers and other charges*<br>**3.3** De-brief with other tour staff<br>**3.4** Pass on feedback received from customers to management | *Briefing information* from the tour operator may include:<br>• Customer information<br>• Itinerary information<br>• Supplier information<br>• Special request notes<br>• Tickets/vouchers or other travel documentation for guide and/or group<br>• Supplier contact details<br>• Optional tour information<br>• Financial documents<br>• Promotional materials<br>• Warnings and advisories<br>• Permissions and authorities that have been approved/obtained.<br>*Specific issues to be considered* may be related to:<br>• Types of customers<br>• Customer special needs<br>• Size of tour group<br>• Length of tour<br>• Specific itinerary requirements<br>• Special requests<br>• Style of commentary and/or activities required<br>• Location of tour<br>• Climate and environmental conditions |

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| | • Equipment and resources required<br>• Environmental and cultural considerations<br>• Language considerations.<br>*Liaise with colleagues* should relate to:<br>• Obtaining information and help from colleagues on the basis of their experience<br>• Obtaining assistance with planning activities<br>• Asking colleagues to check decisions that have been made for the tour<br>• Planning involvement of colleagues in the tour.<br>*Potential risks* may relate to:<br>• Customers, especially their personal health and capacity to participate in the tour<br>• Tour routes including terrain<br>• Climate/weather<br>• Activities to be undertaken<br>• Potential service delivery difficulties<br>• Timing constraints.<br>*Identify and obtain specific resources* should relate to listing and acquiring types and forms of physical resources required including:<br>• Vehicles and vessels<br>• Aircraft and other types of transport which may include live transport, bikes and motorbikes<br>• Camping and catering equipment including food, beverage and refreshments<br>• Safety equipment including first aid kits and communication equipment |

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| | • Recreational and activity equipment<br>• Maintenance equipment<br>• Educational equipment<br>• Cash<br>• Vouchers<br>• Naming and allocating staff to the roster required to conduct the tour including identification of roles and responsibilities based on experience, qualifications, training and integration of skill sets pertaining to human resources that may include:<br>  ▪ Drivers<br>  ▪ Tourist guides<br>  ▪ Driver-guides<br>  ▪ Hosts and hostesses<br>  ▪ Campsite cooks<br>  ▪ Interpreters<br>  ▪ Camp and tour assistants<br>• Quantifying physical resources, by number, amounts, values and volumes<br>• Quantifying human resources, by number and hours.<br><br>*Plans for the tour* may include:<br>• Standard operating plans including their alignment with stated itinerary<br>• Contingency plans<br>• Emergency plans. |

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| | *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:<br>• Complying with safe manual handling techniques<br>• Complying with weight restrictions including vehicles and animals<br>• Taking into account the terrain to be covered and the potential for items to shift during transit<br>• Enabling ready access to equipment and items that will be required first and/or required in the event of an emergency<br>• Following legislated and/or host enterprise procedures for the stowing of hazardous items which may include:<br>  ▪ Sharp tools or equipment<br>  ▪ Heavy items<br>  ▪ Items made of or containing glass<br>  ▪ Gas containers<br>  ▪ Heat-sensitive aerosols<br>  ▪ Medication<br>  ▪ Petrol, fuel and other flammable materials<br>• Securing equipment and supplies to prevent movement, as far as practicable.<br><br>*Brief customers* may include:<br>• Welcoming customers<br>• Introduction of tour guide and crew to customers including identifying their roles and responsibilities<br>• Presenting tour overview including description of itineraries, destination information, timing details, activities, meals/refreshments, and tour options |

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| | • Distributing items including name badges, vouchers, handouts and brochures, safety equipment and/or clothing<br>• Explaining tour requirements including required behaviours, applicable codes of conduct, safety and security issues, need for respect of local communities, cultures, people and the environment, level and nature of physical exertion required<br>• Introducing and/or back grounding the tour including historical data, relevant details, contextual information, and points of interest.<br>*Commence tour* may include:<br>• Loading customers/passengers onto transport including checking seat allocation<br>• Checking customers have paid<br>• Directing customers to the first destination/activity<br>• Engaging with group participants<br>• Encouraging participation<br>• Generating confidence<br>• Building credibility.<br>*Follow itinerary* must include:<br>• Ensuring all advertised destinations, activities including interpretive activities, products and services are delivered as promoted<br>• Providing tour commentary<br>• Optimising the tour experience for all customers<br>• Monitoring, directing, controlling and, where necessary, modifying group and/or individual behaviour |

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| | *Additional information and assistance* may relate to:<br>• Demonstrating principles of tour guiding:<br>▪ Safety and security including people and property and the development of standard and contingency plans<br>▪ Care and respect including for the tour group, locals and the environment<br>▪ Skills, knowledge and ability to conduct/lead the tour<br>▪ Relevant knowledge in relation to the tour including sites, destinations, environment and activities<br>▪ Providing an interesting and engaging experience<br>▪ Ethical conduct<br>• Catering for the needs of those with special needs and individual differences.<br>• Local events and activities<br>• Options for free time activities<br>• General directions<br>• Anecdotes recounting personal experiences<br>• Local facilities.<br>*Engage* may include:<br>• Responding to requests for assistance<br>• Asking for assistance<br>• Liaising in order to make decisions<br>• Providing support for the work of industry colleagues<br>• Anticipating requests and responding proactively |

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| | • Confirming forward bookings with venues, sites, destinations and providers including advising operators of expected arrival time, group numbers, special requests and timing constraints that may apply<br>• Making payment to suppliers, providers and carriers for services and products rendered according to previously agreed arrangements, or as required.<br>*Industry colleagues* will vary depending on the type of tour and may include:<br>• Host communities including community leaders, elders and other designated spokespeople<br>• Coach and other vehicle drivers<br>• Tour managers<br>• Local and independent guides<br>• Carriers<br>• Tour operators including office staff<br>• Product suppliers and venues including hotels and restaurants, attractions and sites, and retail shops<br>• Land owners and land managers<br>• Representatives of statutory authorities.<br>*Respond to issues arising* may include:<br>• Deciding tour alternatives, where applicable, based on group preferences<br>• Modifying and re-planning itinerary based on changed conditions, circumstances and/or customer requests and/or preferences<br>• Adjusting timing to meet deadlines and pre-arranged arrival and departure times<br>• Notifying customers of, and explaining, changes to initial itinerary<br>• Notifying venues, sites, destinations and providers of revised itinerary, as necessary. |

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| | *Deal with unexpected events and emergencies* may include:<br>• Implementing contingency and/or emergency plans<br>• Notifying authorities and/or emergency services to obtain assistance<br>• Maintaining communication with customers to notify them of action to be taken in response to the unexpected event<br>• Optimising the safety of customers including placing the safety of people above the protection of assets<br>• Assuming authority, taking charge and issuing directives to customers<br>• Taking action to minimise the adverse impact of the unexpected event on the conduct, and customer enjoyment of, the tour<br>• Apologising for the event<br>• Adhering to host enterprise policies and procedures with regard to not admitting liability and not promising recompense including referring customers to management, head office or to duty supervisor on arrival back at the departure point, where applicable.<br>*Unexpected events and emergencies* should be planned for, as far as practicable, so that contingency plans can be put into effect when required. The nature of unexpected events and emergencies can vary with tour types and the specifics of individual tours and groups, but may include:<br>• Systems failure including technical and equipment failure<br>• Vehicle breakdown<br>• Vehicle accidents<br>• Injury, accident or death<br>• Adverse weather conditions including the impact of adverse weather conditions in a near-by or associated area<br>• Inappropriate customer behaviour |

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| | • Unpredictable animal behaviour<br>• Road closures<br>• Closures of sites and unannounced restricted access to traditional areas.<br>*Conclude tour* may include<br>• Thanking tour group<br>• Promoting other tours available through the same operator<br>• Providing a tour summary, where appropriate<br>• Collecting returnable items that were distributed to customers<br>• Addressing complaints<br>• Seeking verbal and written feedback<br>• Escorting customers off/from vehicles.<br>*Tour report and documentation* may include:<br>• Vehicle usage books including distance travelled, locations visited, and fuel used/purchased<br>• Maintenance reports and requests<br>• Finalising details of tour that may include:<br>▪ Departure and return times<br>▪ Group numbers<br>▪ Names of tour staff including hours worked<br>▪ Destinations and sites visited<br>▪ Details of deviations from scheduled itinerary including reasons for same<br>▪ Details of complaints received |

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| | ▪ Details of action that had to be taken to address customer behavioural problems<br>▪ Details of accidents and injuries<br>▪ Details of any event where emergency services or authorities were contacted or involved<br><br>Suggestions for changes to future tours including rationale for same.<br><br>*Process cash, vouchers and other charges* may include:<br>• Reconciling money and vouchers<br>• Completing paperwork to support invoicing of charges to individual customers, as appropriate<br>• Forwarding documentation, as required, to the appropriate person/location for further processing or finalisation.<br><br>**Assessment Guide**<br><br>The following skills and knowledge must be assessed as part of this unit:<br>• Enterprise policies and procedures in regard to the co-ordination and operation of day-tours or short excursions<br>• Knowledge of the local tourism industry where tour occurs, and general tour industry knowledge<br>• Principles of guiding<br>• Ability to use first aid and emergency situation techniques<br>• Specific information regarding the tour being conducted<br>• Legal liability issues<br>• Hazard identification and risk management<br>• Communication, leadership, negotiation, conflict resolution and problem-solving skills. |

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| | **Linkages To Other Units**<br>• Work as a tour guide<br>• Conduct pre-departure checks<br>• Conduct interpretive activities in the field<br>• Develop and co-ordinate appropriate cultural tourism activity<br>• Establish and maintain safe touring conditions<br>• Lead tour groups in a responsible manner<br>• Manage and facilitate an extended tour experience<br>• Plan, develop and evaluate interpretive activities<br>• Plan, trial and implement minimal impact operations<br>• Prepare and present tour commentaries<br>• Provide arrival and departure assistance<br>• Research and share information on indigenous cultures<br>• Develop and update tourism industry knowledge.<br>**Critical Aspects of Assessment**<br>Evidence of the following is essential:<br>• Understanding of host enterprise policies and procedures regarding the operation of day-tours and short excursions<br>• Demonstrated ability to undertake practical preparation activities and planning requirements necessary to prepare for the conduct of nominated tour type for a given itinerary to a designated group of customers |

| | |
|---|---|
| | • Demonstrated ability to conduct a day-tour or short excursion of a nominated type for a designated group of people demonstrating the full range of roles, responsibilities and functions of a tour guide and ensuring the advertised activities and destinations are achieved<br>• Demonstrated ability to effectively deal with nominated unexpected events while conducting a tour ensuring that customer safety is preserved, communications with customers are maintained and adverse impacts on the tour and customer experience is minimised<br>• Demonstrated ability to conduct nominated post-tour activities which must include soliciting feedback from customers and colleagues; and completing designated documentation for the tour.<br>**Context of Assessment**<br>Assessment must ensure:<br>• Actual or simulated office environment for pre-tour and post-tour phases; and an actual (short) tour activity for the demonstration of practical tour guiding skills.<br>**Resource Implications**<br>Training and assessment must include a real or simulated itinerary, real or simulated tour group profiles/details and access to a range of actual tour-related equipment, supplies and vehicles; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Note that a representative, but not exhaustive range of equipment and supplies must be available to support demonstration of competency; but emergency and/or unexpected delays may be simulated. |

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| | **Assessment Methods**<br>The following methods may be used to assess competency for this unit:<br>• Observation of practical candidate performance<br>• Portfolio of documentation that may support planning and post-tour tour guiding activities<br>• Role plays<br>• Oral and written questions<br>• Third party reports completed by a supervisor<br>• Project and assignment work.<br>**Key Competencies in this Unit**<br>*Level 1 = competence to undertake tasks effectively*<br>*Level 2 = competence to manage tasks*<br>*Level 3 = competence to use concepts for evaluating* |

| Key Competencies | Level | Examples |
|---|---|---|
| Collecting, organising and analysing information | 2 | Prepare contingency and emergency plans for the tour |
| Communicating ideas and information | 3 | Explain tour-related details to customers prior to and during the tour |
| Planning and organising activities | 3 | Re-plan the itinerary during a tour due to unexpected delays/exigencies |
| Working with others and in teams | 3 | Liaise with tour crew prior to, during and post tour |

| | | | |
|---|---|---|---|
| | Using mathematical ideas and techniques | 1 | Calculate times, distances, numbers and tour-related statistics |
| | Solving problems | 3 | Resolve interpersonal disputes between customers while on tour |
| | Using technology | 1 | Use tour equipment including items for travel, activities, safety and communication |

# Oral questions

| | |
|---|---|
| **Student name** | |
| **Assessor name** | |
| **Location/venue** | |
| **Unit of competency** | Co-ordinate and operate a day-tour (or short excursions)<br>D2.TTG.CL3.05 |
| **Instructions** | 1. Ask student questions from the attached list to confirm knowledge, as necessary<br>2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC')<br>3. Write short-form student answer in the space provided for each question. |

| **Questions** | **Response** | |
|---|---|---|
| | **PC** | **NYC** |
| 1. Tell me about the different types of tours you have coordinated and conducted. | ❑ | ❑ |
| 2. Give me an example of briefing information you receive from the tour operator and explain how you obtain this information. | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 3. Use an example to illustrate how you have addressed specific issues of a tour group in order to meet their identified needs when on tour. | ❑ | ❑ |
| 4. How do you liaise with colleagues as part of the planning and preparation activities prior to conducting a tour? | ❑ | ❑ |
| 5. Describe the process you go through in order to identify risks for an upcoming tour. | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 6. Identify a tour you have coordinated/conducted and describe how you identified and obtained the resources required for that tour. | ❑ | ❑ |
| 7. What detail is contained in the plans you prepare for a day tour/short excursion? | ❑ | ❑ |
| 8. Name a tour you have conducted and describe the process you followed to stow equipment and supplies for that tour. | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 9. Demonstrate how you have briefed customers for a day tour/short excursion. | ❑ | ❑ |
| 10. Use an example to illustrate what you do to commence a day tour/short excursion. | ❑ | ❑ |
| 11. What practices do you use to help ensure a day tour/short excursion stays 'on time' and follows the itinerary? | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 12. Give me an example of what you have done while on a tour to provide additional information and assistance to customers. | ❑ | ❑ |
| 13. Describe situations when you have engaged with industry colleagues during a day tour/short excursion: why do you engage with them? How do you do this? | ❑ | ❑ |
| 14. Give me an example of situations when you were conducting a day tour/short excursion and had to respond to issues and deal with unexpected events and/or emergencies. | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 15. Identify a tour you have conducted and describe the activities involved in concluding the tour. | ❑ | ❑ |
| 16. Give me examples of the documentation you have completed when a tour ends describing the details included in those documents/reports. | ❑ | ❑ |
| 17. Describe the activities you have undertaken when processing cash, vouchers and/or other charges at the end of a tour. | ❑ | ❑ |

| Questions | Response | |
|---|---|---|
| | PC | NYC |
| 18. Tell me about de-briefings you have conducted/participated after tours: what was discussed? Where were they held? Who was involved? | ❑ | ❑ |
| 19. What information have you given to management as part of post-tour activities regarding feedback received from customers? | ❑ | ❑ |

# Written questions

Co-ordinate and operate a day-tour (or short excursions) – D2.TTG.CL3.05

**Student Name:** ____________________________________________________________

Answer all the following questions and submit to your Trainer.

1. Give four examples of site-based tours.

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    ______________________________________________________________________

2. List four ways a Tour Guide can identify the type of tour to be conducted.

    ______________________________________________________________________

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3. Name three ways a Tour Guide might obtain brief/briefing information for a tour/excursions they are to conduct.

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4. Explain what is meant by ‘Interpreting the briefing information’.

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5. Identify six pieces of information which might be contained in tour briefing information.

6. Give three reasons some special requests made by tour group members may not be able to be accommodated.

7. Explain the basic difference between a ‘scheduled’ tour and a ‘custom/private’ tour.

8. Give four reasons Tour Operators will want to meet customer needs.

9. Identify a special request/customer need a tour group member might make and describe how it may be accommodated into a short tour/excursion.

10. Give four reasons those who coordinate and operate a day tour need to liaise with management.

11. Give four reasons those who coordinate and operate a day tour need to liaise with administration.

12. What common law obligations are imposed on businesses and employees by Duty of Care?

13. What are the three basic steps/stages in the formal risk management process?

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14. Give six examples of action that may be needed as a result of undertaking formal risk management for a tour/excursion.

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15. Name four reasons the standard/normal resources used for a scheduled tour may need to differ from what is normally provided.

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16. What are the three general classifications of resources provided for a tour?

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17. Select one classification of resources provided for short tours/day trips and give four examples of relevant resources.

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________________________________________

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18. Name four reasons plans are prepared for tours.

19. Describe four pre-requisites for implementation of tour plans.

20. Select one type of plan normally developed for a day tour/short excursion and outline the contents of that plan.

21. List four important considerations when stowing equipment and supplies for a day tour/short excursion.

22. List four activities inherent in the checking process when loading tour vehicles.

23. Name four practices which might be used to complete final checking when loading a tour vehicle.

24. Identify four pre-requisites for providing tour group members with a positive and welcoming greeting as part of the tour briefing.

25. Name four issues/topics the tour briefing could/should address.

26. List four activities (other than 'building credibility') that might be involved in starting a tour.

27. Give four ways a Tour Guide might build their own credibility with tour group members.

28. Give four examples of what is involved in ensuring the advertised itinerary ids met when conducting a tour.

29. Describe four strategies that can optimise the likelihood of a Tour Guide being able to adhere to a tour itinerary.

30. Name four basic communication strategies which can/should be used to deliver commentaries.

31. List four ways a Tour Guide might monitor/assess the tour group and their possible needs while on tour.

32. Identify four ways a Tour Guide might provide extra information and assistance to tour group members while on-tour.

33. Describe four ways for the Tour Guide to optimise the tour experience for individuals on the tour.

34. What are ‘ice-breakers’ and when and why are they used?

35. Define four options available to Tour Guides for maintaining interest of people on a tour.

36. Give four examples of ‘industry colleagues’ a Tour Guide might need to liaise with on-tour.

37. Provide four examples of engagement a Tour Guide might have with industry colleagues when on-tour.

38. Describe the three keys to effective responses when responding to on-tour issues.

39. Identify four generic responses to issues which arise on-tour.

40. Give four examples of unexpected events and emergencies which a Tour Guide may need to deal with when on-tour.

41. Identify and describe a possible on-tour unexpected event and explain how a Tour Guide might effectively respond to handle the situation.

42. Give four reasons tours/excursions should 'conclude' in accordance with plans made for them.

43. Name four activities which may be included as part of the structured process of concluding a tour/excursion.

44. List four reasons Tour Guides are required by Tour Operators to complete documentation when they complete/conclude their tours.

45. Identify four documents a Tour Guide may need to complete when they conclude a tour.

46. Describe four activities a Tour Guide may need to undertake when processing cash, vouchers and other charges at the end of a tour.

47. What is the common de-briefing period for scheduled day tours/short excursions?

48. List four classifications of persons who might be involved in the de-briefing process for a custom/private day tour/excursion.

49. List four topics which might be on the agenda when conducting a de-briefing after a day tour/excursion.

50. What are the two common generic ways a Tour Guide can/is required to provide customer feedback to management about the tours they conduced?

51. Give four reasons which illustrate the importance/value of customer feedback.

# Answers to written questions

Co-ordinate and operate a day-tour (or short excursions) – D2.TTG.CL3.05

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 examples of site-based tours.**

- Museums, historic sites and galleries tours
- Zoos, preserves and wildlife parks tours
- Gardens, parks, forests and national parks tours
- Tours of factories, businesses, production and processing plants
- Tours of government and semi-government utilities – including power-generating stations, reservoirs and waste-water treatment plants.

**2. List four ways a Tour Guide can identify the type of tour to be conducted**

- Looking at the tour schedule
- Talking to management
- Reading relevant documentation
- Analysing briefing information for the tour.

**3. Name three ways a Tour Guide might obtain brief/briefing information for a tour/excursions they are to conduct.**

- Attending a face-to-face briefing session with management
- Logging on to an internal database/intranet
- Being provided with hard copy information when signing in for work, at meetings, on notice board, in pigeon holes.

**4. Explain what is meant by 'Interpreting the briefing information'.**

Answer needs to address:

- Identifying what applies to individual tours that may have the potential to make similar tours, different
- Incorporating the details contained within the information to help develop, plan and prepare for the tour
- Using the information to:
  - Determine the needs/requirements of the tour in terms of resources and inclusions
  - Work out the parameters/limitations and/or restrictions which apply to a tour.

**5. Identify six pieces of information which might be contained in tour briefing information.**

- Customer information/details, profiles
- Itineraries – customer and operational
- Supplier information – for things to be provided on-tour
- Special requests
- Tickets/vouchers or other travel documentation for guide and/or group
- Operational tour information
- Financial documents and cash
- Optional tour information – information sheets, maps
- Promotional materials.

**6. Give three reasons some special requests made by tour group members may not be able to be accommodated.**

- Cost-related issues
- Time-related issues
- Safety-related issues which are unable to be met.

**7. Explain the basic difference between a 'scheduled' tour and a 'custom/private' tour.**

Answer must address:

*Scheduled tours*

- 'Scheduled tours' are those which are time-tabled and advertised to run at set times on set days
- They are conducted on a regular basis and essentially follow the same itinerary, tour after tour.

*Custom/private tours*

- 'Custom/Private tours' are one-off tours developed to meet the requirements of a specific client.

**8. Give four reasons Tour Operators will want to meet customer needs.**

In order to:

- Optimise their satisfaction with their tour experience
- Increase the chance of repeat business and referral business
- Provide enhance value-for-money
- Maintain and grow the reputation of the business.

**9. Identify a special request/customer need a tour group member might make and describe how it may be accommodated into a short tour/excursion.**

No model answer.

**10. Give four reasons those who coordinate and operate a day tour need to liaise with management.**

- To obtain the benefit of their knowledge and insight
- To determine their expectations relating to the tour
- To identify arrangements they may have made with joint-venture partners
- To identify special requirements made with groups who have organised a tour and with whom 'special arrangements' have been made/contracted
- To gain an appreciation of their context for the tour and how it fits within the total menu of offerings of trips/tours advertised by the organisation
- To communicate personal thoughts and concerns relating to tour resourcing
- To obtain necessary authorisations and approvals to proceed with the tour.

**11. Give four reasons those who coordinate and operate a day tour need to liaise with administration.**

- To determine operational/working parameters for the tour
- To obtain budget data – funding amounts, budget codes and similar
- To capture data/figures relation to previous similar tours – to use for basis and comparison purposes
- To identify human resources available for the tour
- To determine paperwork/documentation that needs to be completed in relation to capturing required resource allocation and usage for the tour
- To assist with optimising use of limited resources – by contributing to discussions/action which facilitates sharing of resources amongst other tours/other staff within the organisation.

**12. What common law obligations are imposed on businesses and employees by Duty of Care?**

All businesses and employees have a common law Duty of Care to:

- 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.

**13. What are the three basic steps/stages in the formal risk management process?**

- Risk identification – where action is taken to determine all possible risks which might apply/pertain to the tour/excursion
- Risk analysis and assessment – where identified risks are considered to determine the threat they pose in terms of likelihood of occurrence coupled with potential consequence
- Risk control – where acceptable/suitable protocols are provided to effectively manage the identified risks.

**14. Give six examples of action that may be needed as a result of undertaking formal risk management for a tour/excursion.**

- Produce written risk management plans
- Ensure vehicles used are safe and comply with relevant in-country requirements
- Provide regular service and maintenance to vehicles
- Make sure drivers of vehicles are properly licensed and hold valid/current licences
- Provide all necessary PPE for all tour group members (and staff)
- Produce and provide relevant safety information and advice (including demonstrations of requirements, and [where appropriate] practice/drill prior to engagement with activities etc.) to tour group members
- Develop, possess and know the contents of a range of Emergency Management Plans
- Check the personal health and capacity of tour group members
- Determine tour routes
- Check climate/weather
- Determine on-tour activities to be undertaken.

**15. Name four reasons the standard/normal resources used for a scheduled tour may need to differ from what is normally provided.**

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

**16. What are the three general classifications of resources provided for a tour?**

- Financial resources
- Physical resources
- Human resources.

**17. Select one classification of resources provided for short tours/day trips and give four examples of relevant resources.**

No model answer.

**18. Name four reasons plans are prepared for tours.**

- Ensure tours/excursions operate smoothly
- Control costs, timing and activities that are part of the tour
- Optimise potential of tours/excursions to meet customer expectations
- Comply with legislation and legal obligations
- Give direction to Tour staff when things go wrong or do not go as planned/expected
- Assist with tour management, organisation, coordination, planning and integration of tours/excursions with other organisational activities.

**19. Describe four pre-requisites for implementation of tour plans.**

For plans to be effective several pre-requisites exist:

- They need to be properly and adequately resourced
- They need to trialled and tested
- The trials/tests needs to be reviewed and the plans revised, as/if necessary
- They need to be communicated to staff
- Demonstrations, practice and/or drills must underpin actual implementation
- They need to be reviewed and updated as tours and requirements/relevant issues alter.

**20. Select one type of plan normally developed for a day tour/short excursion and outline the contents of that plan.**

No model answer.

**21. List four important considerations when stowing equipment and supplies for a day tour/short excursion.**

- 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 and/or host enterprise procedures for the stowing of hazardous items
- Securing equipment and supplies.

**22. List four activities inherent in the checking process when loading tour vehicles.**

- Meeting with tour staff to conduct the check
- Photocopying the 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.

**23. Name four practices which might be used to complete final checking when loading a tour vehicle.**

- 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.

**24. Identify four pre-requisites for providing tour group members with a positive and welcoming greeting as part of the tour briefing.**

- Be prepared
- Be there early
- Verbally welcome people
- Smile
- Thank group leader if there is one
- Make necessary introductions.

**25. Name four issues/topics the tour briefing could/should address.**

- Welcoming the tour group members
- Presenting tour/excursion overview
- Distributing items as appropriate to the needs of the tour/excursion
- Advising of Do’s and Don’t’s of the tour/excursion (so called ‘tour requirements’)
- Notifying of what to do if a person becomes separated from the group
- Presenting safety precautions
- Explaining site policies where necessary for attractions and destinations
- Encouraging group to enjoy the tour/excursion and motivating them to participate and engage with all activities and inclusions
- Making a specific invitation to the group to ask questions, notify of issues.

**26. List four activities that might be involved in starting a tour.**

- Checking customers have paid
- Loading customers/passengers
- Directing customers to the first destination/activity
- Engaging with group participants
- Encouraging participation
- Generating confidence.

**27. Give four ways a Tour Guide might build their own credibility with tour group members.**

- Dressing appropriately
- Acting and speaking professionally
- Proving things are organised by conducting the tour as scheduled
- Providing relevant and interesting information and insight into what is said
- Acting as a role model
- Directing, navigating and moving people in relation to where they go, what they do, how long they spend in an area/on an activity
- Showing people what to do – such as demonstrating skills, demonstrating safety equipment/requirements, demonstrating local activities.

**28. Give four examples of what is involved in ensuring the advertised itinerary ids met when conducting a tour.**

- Ensuring all listed destinations are visited
- Making sure all promised attractions are covered
- Guaranteeing expected activities are conducted (including interpretive activities)
- Delivering products and services as promoted
- Adhering to the order/sequence and schedule/timing set out.

**29. Describe four strategies that can optimise the likelihood of a Tour Guide being able to adhere to a tour itinerary.**

- Know the itinerary – this means either memorising it or having a hard copy available for constant reference
- The itinerary is the key to the tour so it is absolutely critical the Tour Guide knows exactly what is listed/has been arranged or promised to the tour group
- Always start on-time – if possible (that is, if all tour group members are present) be prepared to start early
- Give briefings on the vehicle – as opposed to on arrival at destinations
- Distribute materials and information, vouchers, gear and others resources on the vehicle – as opposed to waiting for arrival at the location
- Keep an eye on the time – there is an ever-present necessity to know exactly what the time is at all times: this requirements is doubly important for day tours/short excursions given the limited capacity to be able to make up lost time
- Try to group tour participants when providing information and advice – as opposed to having to perform multiple one-on-one demonstrations and/or explanations
- Many operators/Tour Guides will use some form of amplification (PA system, megaphone) to help with this
- Communicate with destinations and attractions – to let them know/remind them the tour has commenced, when it is scheduled to arrive and what is expected from them.

**30. Name four basic communication strategies which can/should be used to deliver commentaries.**

- Ensuring visibility to all tour group members
- Facing the group
- Speaking loudly enough for everyone to hear
- Remaining enthusiastic and appropriate for the tour content
- Beginning the verbal commentary sufficiently in advance of a scheduled tour stop
- Focussing attention on entire group
- Communicating at level that will be understood by the audience considering their age, education, language, culture and special needs
- Seeking feedback from the group throughout the commentary
- Encouraging questions
- Making the commentary a 'unique' event
- Knowing when to be quiet
- Adjusting the commentary as required.

**31. List four ways a Tour Guide might monitor/assess the tour group and their possible needs while on tour.**

- Visual observation
- Listening to comments made
- Being informed directly by someone
- Asking regular questions of the group or individuals within the group
- Creating an environment which encourages them to say if they have any issues, concerns or personal requests.

**32. Identify four ways a Tour Guide might provide extra information and assistance to tour group members while on-tour.**

- Identify and explain local events and activities, and current issues impacting the country/local community
- Provide options for free time activities
- Give general directions in relation to the location and/or use of local facilities
- Use anecdotes when interacting with participants.

**33. Describe four ways for the Tour Guide to optimise the tour experience for individuals on the tour.**

- Using humour when talking with people
- Checking on people's welfare
- Applying suitable interpersonal and communication skills at every opportunity/exchange
- Involving them in what is happening
- Making sure the tour group receives products, experiences, inclusions they have been promised/paid for.

**34. What are 'ice-breakers' and when and why are they used?**

These are quick exercises/games used at the start of a tour to 'break the ice' and introduce tour group members to each other so they get to learn a little about each other.

**35. Define four options available to Tour Guides for maintaining interest of people on a tour.**

- Demonstrating personal passion
- Tailoring information to the identified needs of the group
- Using a prop kit
- Using variety of approaches – humour, stats, questions
- Highlighting unexpected occurrences and including them in the commentary
- Interacting with tour group members
- Improvising the commentary
- Striving to deliver excellent service at all times regardless of the problems or situations which present themselves
- Demonstrating interest in tour group members.

**36. Give four examples of 'industry colleagues' a Tour Guide might need to liaise with on-tour.**

- Host communities
- Tour operator employees
- Third party providers, joint venture partner and agencies
- Animal handlers
- Local and independent guides
- Designated/arranged persons ('Contacts') at product suppliers and venues
- Land owners and land managers
- Representatives of statutory authorities.

**37. Provide four examples of engagement a Tour Guide might have with industry colleagues when on-tour.**

- Responding to requests for assistance – from destinations, carriers and suppliers
- Asking for assistance
- Liaising with individuals and properties to assist with planning, decision making, tracking and monitoring of progress
- Providing support for the work of industry colleagues
- Anticipating requests and responding positively and proactively
- Communicating with venues, sites, destinations and providers to confirm bookings and arrangements, make arrangements and negotiate deals/requirements
- Making payment for services and products rendered according to previously agreed arrangements, or as required.

**38. Describe the three keys to effective responses when responding to on-tour issues.**

- Identify them as soon as possible
- Think – consider options: respond rather than react
- Produce a solution which duplicates to the best extent possible the original itinerary sold to the customers.

**39. Identify four generic responses to issues which arise on-tour.**

- Modifying and re-planning itinerary
- Adjusting timing
- Notifying customers of changes
- Notifying relevant others of changes which have to be made.

**40. Give four examples of unexpected events and emergencies which a Tour Guide may need to deal with when on-tour.**

- Systems failure – including significant technical and equipment failure
- Situations involving tour group members which result in injury, accident, death
- Inappropriate customer behaviour
- Unpredictable animal behaviour.

**41. Identify and describe a possible on-tour unexpected event and explain how a Tour Guide might effectively respond to handle the situation.**

No model answer.

**42. Give four reasons tours/excursions should 'conclude' in accordance with plans made for them.**

All tours/excursions should 'conclude' in accordance with plans made for them so:

- The professionalism of the Tour Operator is maintained
- Tour group participants get the most from their experience
- Customers have an opportunity to provide feedback
- People who have been on the tour/excursion are left with a positive impression as their last sentiment about the tour.

**43. Name four activities which may be included as part of the structured process of concluding a tour/excursion.**

- Providing a tour summary
- Collecting returnable items
- Escorting customers off/from vehicles
- Farewelling tour group members
- Capturing feedback
- Cleaning.

**44. List four reasons Tour Guides are required by Tour Operators to complete documentation when they complete/conclude their tours.**

To assist with:

- Costing tours
- Controlling costs
- Determining the need to increase prices for tickets/tours
- Monitoring customer responses and feedback to tours
- Helping to deter theft
- Paying people/staff and organisations
- Taking appropriate action in response to issues raised on the tour.

**45. Identify four documents a Tour Guide may need to complete when they conclude a tour.**

- Tour report
- Suggestions form
- Vehicle usage books
- Maintenance reports and requests.

**46. Describe four activities a Tour Guide may need to undertake when processing cash, vouchers and other charges at the end of a tour.**

- Reconciling money
- Reconciling vouchers
- Completing paperwork to support invoicing, and payment for purchases made
- Forwarding all supporting documentation.

**47. What is the common de-briefing period for scheduled day tours/short excursions?**

Every month to every three months

**48. List four classifications of persons who might be involved in the de-briefing process for a custom/private day tour/excursion.**

- Co-workers who were on-tour
- Management
- The marketing department
- Administration
- Heads of departments/sections
- Representatives from:
  - Third party providers
  - Agents/agencies
  - Joint venture partners
  - Client.

**49. List four topics which might be on the agenda when conducting a de-briefing after a day tour/excursion.**

- Discussion of events and the tour in general
- Presentation and review of feedback from customers
- Consideration of the feasibility and practicability of the tour
- Identification of lessons learned and how and why they need to be applied elsewhere/in the future
- Identification of need to produce new (or review existing) plans, checklists, loading allocations, resources, staffing arrangements, inclusions and/or itineraries
- Identification of opportunities for improvements, other tour types and/or potential tour group customers.

**50. What are the two common generic ways a Tour Guide can/is required to provide customer feedback to management about the tours they conduced?**

- In writing
- Giving verbal report/presentation
- Combination of the above two approaches.

**51. Give four reasons which illustrate the importance/value of customer feedback.**

The importance/value lies in the facts that:

- It represents feedback about what actually happened
- It is feedback from those who actually experienced it
- It is timely, recent and relevant
- The issue/s at the root of it is of such concern to the customer they actually took the time and made the effort to say something about it – it is/was IMPORTANT to them
- Customer feedback are the school books from which organisations learn – if a business wants to grow and remain viable it MUST listen and respond to what its customers say: what customers say is more important than/just as important as what management think and what the competition is doing.

# Observation checklist

| | |
|---|---|
| **Student name** | |
| **Assessor name** | |
| **Location/venue** | |
| **Unit of competency** | Co-ordinate and operate a day-tour (or short excursions)<br>D2.TTG.CL3.05 |
| **Dates of observation** | |
| **Instructions** | 1. Over a period of time observe the student completing each of the following tasks:<br>a) Prepare for the tour<br>b) Conduct the tour<br>c) Complete post-tour activities<br>2. Enter the date on which the tasks were undertaken<br>3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise<br>4. Complete the feedback sections of the form, if required. |

| **Did the candidate** | **Yes** | **No** |
|---|---|---|
| **Element 1:Prepare for the tour** | | |
| Identify the type of tour to be conducted | ❑ | ❑ |
| Interpret briefing information from the tour operator | ❑ | ❑ |
| Describe the specific issues to be considered to ensure customer needs are met | ❑ | ❑ |
| Liaise with colleagues | ❑ | ❑ |
| Identify potential risks for the tour | ❑ | ❑ |
| Identify and obtain specific resources for individual tours | ❑ | ❑ |
| Develop plans for the tour | ❑ | ❑ |
| Stow equipment and supplies for the tour | ❑ | ❑ |

| Did the candidate | Yes | No |
|---|---|---|
| **Element 2: Conduct the tour** | | |
| Brief customers about tour | ❑ | ❑ |
| Commence tour | ❑ | ❑ |
| Follow itinerary for the tour | ❑ | ❑ |
| Provide additional information and assistance | ❑ | ❑ |
| Engage with industry colleagues during the tour | ❑ | ❑ |
| Respond to issues arising while on tour | ❑ | ❑ |
| Deal with unexpected events and emergencies | ❑ | ❑ |
| Conclude tour as planned | ❑ | ❑ |
| **Element 3: Complete post-tour activities** | | |
| Complete tour report and documentation | ❑ | ❑ |
| Process cash, vouchers and other charges | ❑ | ❑ |
| De-brief with other tour staff | ❑ | ❑ |
| Pass on feedback received from customers to management | ❑ | ❑ |
| **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<br>*Please specify:*________________________________<br>*Please do not complete the form if you are a relative, close friend or have a conflict of interest]* | | |
| **Unit of competency:** | Co-ordinate and operate a day-tour (or short excursions)<br>D2.TTG.CL3.05 | | |

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?**<br>*(tick the correct response]* | **Yes** | **No** | **Not sure** |
|---|---|---|---|
| Identifies and interprets requirements and risks for tours and prepares suitable plans | ❑ | ❑ | ❑ |
| Identifies, obtains and stows resources for tours | ❑ | ❑ | ❑ |
| Briefs customers before tour starts | ❑ | ❑ | ❑ |
| Conducts tours adhering to itinerary | ❑ | ❑ | ❑ |
| Engages with customers during tour responding to questions and providing information as required | ❑ | ❑ | ❑ |
| Deals with issues and unexpected events on tour | ❑ | ❑ | ❑ |
| Concludes tours as planned and finalises post-tour documentation | ❑ | ❑ | ❑ |
| Process tour-related cash, vouchers and charges | ❑ | ❑ | ❑ |
| De-briefs after the tour and provides feedback received from customers to management | ❑ | ❑ | ❑ |

| 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** | Co-ordinate and operate a day-tour (or short excursions) | D2.TTG.CL3.05 |
| **Date assessment commenced** | | |
| **Date assessment finalised** | | |
| **Assessment decision** | Pass Competent / Not Yet Competent (Circle one) | |
| **Follow up action required**<br>(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: Prepare for the tour** | | | | | | |
| Identify the type of tour to be conducted | | | | | | |
| Interpret briefing information from the tour operator | | | | | | |
| Describe the specific issues to be considered to ensure customer needs are met | | | | | | |
| Liaise with colleagues | | | | | | |
| Identify potential risks for the tour | | | | | | |
| Identify and obtain specific resources for individual tours | | | | | | |
| Develop plans for the tour | | | | | | |
| Stow equipment and supplies for the 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 2: Conduct the tour** | | | | | | |
| Brief customers about tour | | | | | | |
| Commence tour | | | | | | |
| Follow itinerary for the tour | | | | | | |
| Provide additional information and assistance | | | | | | |
| Engage with industry colleagues during the tour | | | | | | |
| Respond to issues arising while on tour | | | | | | |
| Deal with unexpected events and emergencies | | | | | | |
| Conclude tour as planned | | | | | | |

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: Complete post-tour activities** | | | | | | |
| Complete tour report and documentation | | | | | | |
| Process cash, vouchers and other charges | | | | | | |
| De-brief with other tour staff | | | | | | |
| Pass on feedback received from customers to management | | | | | | |

| | | | |
|---|---|---|---|
| **Candidate signature:** | | **Date:** | |
| **Assessor signature:** | | **Date:** | |

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