

Competency Standard

UNIT TITLE: CONDUCT PRE-DEPARTURE CHECKS		NOMINAL HOURS: 50
UNIT NUMBER: D2.TTG.CL3.04 D2.TTO.CL4.04		
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.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify tour requirements</p> <p>1.1 <i>Identify itinerary</i> for the tour</p> <p>1.2 <i>Identify group numbers</i> on the tour</p> <p>1.3 <i>Identify supplies that can be obtained on tour</i></p> <p>1.4 <i>Identify special needs</i> for the tour</p> <p>1.5 <i>Identify budget for equipment and supplies</i> for the tour</p> <p>1.6 <i>Determine final requirements</i> for the tour</p> <p>Element 2: Prepare identified tour requirements</p> <p>2.1 <i>Obtain identified equipment and supplies</i></p> <p>2.2 <i>Check condition of equipment and supplies</i></p> <p>2.3 <i>Confirm quantity of equipment and supplies</i></p>	<p>Unit Variables</p> <p>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.</p> <p>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:</p> <p>1. Tour Operation</p> <p><i>Identify itinerary</i> will include:</p> <ul style="list-style-type: none"> • 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. 	

<p>2.4 Ensure compliance with <i>host enterprise protocols for equipment and supplies</i></p> <p>2.5 Acquire additional equipment and supplies, where needed</p> <p>2.6 <i>Verify identified equipment and supplies with tour staff</i></p> <p>2.7 Develop checklist of all equipment and supplies for use when loading and while on tour</p>	<p><i>Identify group numbers</i> will include:</p> <ul style="list-style-type: none"> • 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.
<p>Element 3: Load identified tour requirements</p> <p>3.1 <i>Prepare loading sheet</i> for each vehicle or form of transport to be used</p> <p>3.2 <i>Stow equipment and supplies</i></p> <p>3.3 Use checklist/s to ensure all equipment and supplies are loaded</p> <p>3.4 <i>Conduct final check</i> of all vehicles, equipment and supplies</p>	<p><i>Supplies that can be obtained on tour</i> may be related to:</p> <ul style="list-style-type: none"> • Undertaking a cost-benefit analysis regarding the decision to take supplies, or buy them <i>en route</i> • Verifying availability of supplies identified for purchase <i>en route</i> • Ensuring cash, credit or pre-paid arrangements have been made with identified suppliers.
<p>Element 4: Complete documentation</p> <p>4.1 <i>Finalise checklists and supply sheets</i></p> <p>4.2 Provide <i>tour-related documents</i> to guides and tour leaders</p> <p>4.3 <i>Forward documentation</i> to external suppliers</p> <p>4.4 Finalise <i>documentation for tour members</i></p> <p>4.5 Update <i>internal inventory and stock control records</i></p>	<p><i>Identify special needs</i> may include:</p> <ul style="list-style-type: none"> • 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. <p><i>Identify budget</i> should relate to:</p> <ul style="list-style-type: none"> • 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.

<p>Key Competencies in this Unit</p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p>		
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