Allocate tour resources

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

Trainer Guide

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Trainer Guide

Project Base

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Table of contents

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Competency Based Training (CBT) and assessment – An introduction for trainers

Competency

Competency refers to the ability to perform particular tasks and duties to the standard of performance expected in the workplace.

Competency requires the application of specified knowledge, skills and attitudes relevant to effective participation, consistently over time and in the workplace environment.

The essential skills and knowledge are either identified separately or combined.

Knowledge identifies what a person needs to know to perform the work in an informed and effective manner.

Skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.

Attitude describes the founding reasons behind the need for certain knowledge or why skills are performed in a specified manner.

Competency covers all aspects of workplace performance and involves:

- Performing individual tasks

- Managing a range of different tasks

- Responding to contingencies or breakdowns

- Dealing with the responsibilities of the workplace

- Working with others.

Unit of competency

Like with any training qualification or program, a range of subject topics are identified that focus on the ability in a certain work area, responsibility or function.

Each manual focuses on a specific unit of competency that applies in the hospitality workplace.

In this manual a unit of competency is identified as a 'unit'.

Each unit of competency identifies a discrete workplace requirement and includes:

- Knowledge and skills that underpin competency

- Language, literacy and numeracy

- Occupational safety and health requirements.

Each unit of competency must be adhered to in training and assessment to ensure consistency of outcomes.

Element of competency

An element of competency describes the essential outcomes within a unit of competency.

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

In this manual elements of competency are identified as an 'element'.

Performance criteria

Performance criteria indicate the standard of performance that is required to demonstrate achievement within an element of competency. The standards reflect identified industry skill needs.

Performance criteria will be made up of certain specified skills, knowledge and attitudes.

Learning

For the purpose of this manual learning incorporates two key activities:

- Training
- Assessment.

Both of these activities will be discussed in detail in this introduction.

Today training and assessment can be delivered in a variety of ways. It may be provided to participants:

- On-the-job – in the workplace
- Off-the-job – at an educational institution or dedicated training environment
- As a combination of these two options.

No longer is it necessary for learners to be absent from the workplace for long periods of time in order to obtain recognised and accredited qualifications.

Learning approaches

This manual will identify two avenues to facilitate learning:

Competency Based Training (CBT)

This is the strategy of developing a participant's competency.

Educational institutions utilise a range of training strategies to ensure that participants are able to gain the knowledge and skills required for successful:

- Completion of the training program or qualification
- Implementation in the workplace.

The strategies selected should be chosen based on suitability and the learning styles of participants.

Competency Based Assessment (CBA)

This is the strategy of assessing competency of a participant.

Educational institutions utilise a range of assessment strategies to ensure that participants are assessed in a manner that demonstrates validity, fairness, reliability, flexibility and fairness of assessment processes.

Flexibility in learning

It is important to note that flexibility in training and assessment strategies is required to meet the needs of participants who may have learning difficulties. The strategies used will vary, taking into account the needs of individual participants with learning difficulties. However they will be applied in a manner which does not discriminate against the participant or the participant body as a whole.

Catering for participant diversity

Participants have diverse backgrounds, needs and interests. When planning training and assessment activities to cater for individual differences, trainers and assessors should:

- Consider individuals' experiences, learning styles and interests

- Develop questions and activities that are aimed at different levels of ability

- Modify the expectations for some participants

- Provide opportunities for a variety of forms of participation, such as individual, pair and small group activities

- Assess participants based on individual progress and outcomes.

The diversity among participants also provides a good reason for building up a learning community in which participants support each other's learning.

Participant centred learning

This involves taking into account structuring training and assessment that:

- *Builds on strengths* – Training environments need to demonstrate the many positive features of local participants (such as the attribution of academic success to effort, and the social nature of achievement motivation) and of their trainers (such as a strong emphasis on subject disciplines and moral responsibility). These strengths and uniqueness of local participants and trainers should be acknowledged and treasured

- *Acknowledges prior knowledge and experience* – The learning activities should be planned with participants' prior knowledge and experience in mind

- *Understands learning objectives* – Each learning activity should have clear learning objectives and participants should be informed of them at the outset. Trainers should also be clear about the purpose of assignments and explain their significance to participants

- *Teaches for understanding* – The pedagogies chosen should aim at enabling participants to act and think flexibly with what they know

- *Teaches for independent learning* – Generic skills and reflection should be nurtured through learning activities in appropriate contexts of the curriculum. Participants should be encouraged to take responsibility for their own learning

- *Enhances motivation* – Learning is most effective when participants are motivated. Various strategies should be used to arouse the interest of participants

- *Makes effective use of resources* – A variety of teaching resources can be employed as tools for learning

- *Maximises engagement* – In conducting learning activities, it is important for the minds of participants to be actively engaged

- *Aligns assessment with learning and teaching* – Feedback and assessment should be an integral part of learning and teaching

- *Caters for learner diversity* – Trainers should be aware that participants have different characteristics and strengths and try to nurture these rather than impose a standard set of expectations.

Active learning

The goal of nurturing independent learning in participants does not imply that they always have to work in isolation or solely in a classroom. On the contrary, the construction of knowledge in tourism and hospitality studies can often best be carried out in collaboration with others in the field. Sharing experiences, insights and views on issues of common concern, and working together to collect information through conducting investigative studies in the field (active learning) can contribute a lot to their eventual success.

Active learning has an important part to play in fostering a sense of community in the class. First, to operate successfully, a learning community requires an ethos of acceptance and a sense of trust among participants, and between them and their trainers. Trainers can help to foster acceptance and trust through encouragement and personal example, and by allowing participants to take risks as they explore and articulate their views, however immature these may appear to be. Participants also come to realise that their classmates (and their trainers) are partners in learning and solving.

Trainers can also encourage cooperative learning by designing appropriate group learning tasks, which include, for example, collecting background information, conducting small-scale surveys, or producing media presentations on certain issues and themes. Participants need to be reminded that, while they should work towards successful completion of the field tasks, developing positive peer relationships in the process is an important objective of all group work.

Competency Based Training (CBT)

Principle of Competency Based Training

Competency based training is aimed at developing the knowledge, skills and attitudes of participants, through a variety of training tools.

Training strategies

The aims of this curriculum are to enable participants to:

- Undertake a variety of subject courses that are relevant to industry in the current environment

- Learn current industry skills, information and trends relevant to industry

- Learn through a range of practical and theoretical approaches

- Be able to identify, explore and solve issues in a productive manner

- Be able to become confident, equipped and flexible managers of the future

- Be 'job ready' and a valuable employee in the industry upon graduation of any qualification level.

To ensure participants are able to gain the knowledge and skills required to meet competency in each unit of competency in the qualification, a range of training delivery modes are used.

Types of training

In choosing learning and teaching strategies, trainers should take into account the practical, complex and multi-disciplinary nature of the subject area, as well as their participant's prior knowledge, learning styles and abilities.

Training outcomes can be attained by utilising one or more delivery methods:

Lecture/tutorial

This is a common method of training involving transfer of information from the trainer to the participants. It is an effective approach to introduce new concepts or information to the learners and also to build upon the existing knowledge. The listener is expected to reflect on the subject and seek clarifications on the doubts.

Demonstration

Demonstration is a very effective training method that involves a trainer showing a participant how to perform a task or activity. Through a visual demonstration, trainers may also explain reasoning behind certain actions or provide supplementary information to help facilitate understanding.

Group discussions

Brainstorming in which all the members in a group express their ideas, views and opinions on a given topic. It is a free flow and exchange of knowledge among the participants and the trainer. The discussion is carried out by the group on the basis of their own experience, perceptions and values. This will facilitate acquiring new knowledge. When everybody is expected to participate in the group discussion, even the introverted persons will also get stimulated and try to articulate their feelings.

The ideas that emerge in the discussions should be noted down and presentations are to be made by the groups. Sometimes consensus needs to be arrived at on a given topic. Group discussions are to be held under the moderation of a leader guided by the trainer. Group discussion technique triggers thinking process, encourages interactions and enhances communication skills.

Role play

This is a common and very effective method of bringing into the classroom real life situations, which may not otherwise be possible. Participants are made to enact a particular role so as to give a real feel of the roles they may be called upon to play. This enables participants to understand the behaviour of others as well as their own emotions and feelings. The instructor must brief the role players on what is expected of them. The role player may either be given a ready-made script, which they can memorise and enact, or they may be required to develop their own scripts around a given situation. This technique is extremely useful in understanding creative selling techniques and human relations. It can be entertaining and energising and it helps the reserved and less literate to express their feelings.

Simulation games

When trainees need to become aware of something that they have not been conscious of, simulations can be a useful mechanism. Simulation games are a method based on "here and now" experience shared by all the participants. The games focus on the participation of the trainees and their willingness to share their ideas with others. A "near real life" situation is created providing an opportunity to which they apply themselves by adopting certain behaviour. They then experience the impact of their behaviour on the situation. It is carried out to generate responses and reactions based on the real feelings of the participants, which are subsequently analysed by the trainer.

While use of simulation games can result in very effective learning, it needs considerable trainer competence to analyse the situations.

Individual /group exercises

Exercises are often introduced to find out how much the participant has assimilated. This method involves imparting instructions to participants on a particular subject through use of written exercises. In the group exercises, the entire class is divided into small groups, and members are asked to collaborate to arrive at a consensus or solution to a problem.

Case study

This is a training method that enables the trainer and the participant to experience a real life situation. It may be on account of events in the past or situations in the present, in which there may be one or more problems to be solved and decisions to be taken. The basic objective of a case study is to help participants diagnose, analyse and/or solve a particular problem and to make them internalise the critical inputs delivered in the training. Questions are generally given at the end of the case study to direct the participants and to stimulate their thinking towards possible solutions. Studies may be presented in written or verbal form.

Field visit

This involves a carefully planned visit or tour to a place of learning or interest. The idea is to give first-hand knowledge by personal observation of field situations, and to relate theory with practice. The emphasis is on observing, exploring, asking questions and understanding. The trainer should remember to brief the participants about what they should observe and about the customs and norms that need to be respected.

Group presentation

The participants are asked to work in groups and produce the results and findings of their group work to the members of another sub-group. By this method participants get a good picture of each other's views and perceptions on the topic and they are able to compare them with their own point of view. The pooling and sharing of findings enriches the discussion and learning process.

Practice sessions

This method is of paramount importance for skills training. Participants are provided with an opportunity to practice in a controlled situation what they have learnt. It could be real life or through a make-believe situation.

Games

This is a group process and includes those methods that involve usually fun-based activity, aimed at conveying feelings and experiences, which are everyday in nature, and applying them within the game being played. A game has set rules and regulations, and may or may not include a competitive element. After the game is played, it is essential that the participants be debriefed and their lessons and experiences consolidated by the trainer.

Research

Trainers may require learners to undertake research activities, including online research, to gather information or further understanding about a specific subject area.

Competency Based Assessment (CBA)

Principle of Competency Based Assessment

Competency based assessment is aimed at compiling a list of evidence that shows that a person is competent in a particular unit of competency.

Competencies are gained through a multitude of ways including:

- Training and development programs

- Formal education

- Life experience

- Apprenticeships

- On-the-job experience

- Self-help programs.

All of these together contribute to job competence in a person. Ultimately, assessors and participants work together, through the 'collection of evidence' in determining overall competence.

This evidence can be collected:

- Using different formats

- Using different people

- Collected over a period of time.

The assessor, who is ideally someone with considerable experience in the area being assessed, reviews the evidence and verifies the person as being competent or not.

Flexibility in assessment

Whilst allocated assessment tools have been identified for this subject, all attempts are made to determine competency and suitable alternate assessment tools may be used, according to the requirements of the participant.

The assessment needs to be equitable for all participants, taking into account their cultural and linguistic needs.

Competency must be proven regardless of:

- Language
- Delivery Method
- Assessment Method.

Assessment objectives

The assessment tools used for subjects are designed to determine competency against the 'elements of competency' and their associated 'performance criteria'.

The assessment tools are used to identify sufficient:

a) Knowledge, including underpinning knowledge

b) Skills

c) Attitudes

Assessment tools are activities that trainees are required to undertake to prove participant competency in this subject.

All assessments must be completed satisfactorily for participants to obtain competence in this subject. There are no exceptions to this requirement, however, it is possible that in some cases several assessment items may be combined and assessed together.

Types of assessment

Allocated Assessment Tools

There are a number of assessment tools that are used to determine competency in this subject:

- Work projects
- Written questions
- Oral questions
- Third Party Report
- Observation Checklist.

Instructions on how assessors should conduct these assessment methods are explained in the Assessment Manuals.

Alternative assessment tools

Whilst this subject has identified assessment tools, as indicated above, this does not restrict the assessor from using different assessment methods to measure the competency of a participant.

Evidence is simply proof that the assessor gathers to show participants can actually do what they are required to do.

Whilst there is a distinct requirement for participants to demonstrate competency, there are many and diverse sources of evidence available to the assessor.

Ongoing performance at work, as verified by a supervisor or physical evidence, can count towards assessment. Additionally, the assessor can talk to customers or work colleagues to gather evidence about performance.

A range of assessment methods to assess competency include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals: slides, audio tapes
- Case studies
- Log books
- Projects
- Role plays
- Group projects
- Group discussions
- Examinations.

Recognition of Prior Learning

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.

Also known as a Skills Recognition Audit (SRA), this process is a learning and assessment pathway which encompasses:

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

Assessing competency

As mentioned, 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. Traditionally in education, grades or marks were given to participants, dependent on how many questions the participant successfully answered in an assessment tool.

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'.

Competency standard

UNIT TITLE: ALLOCATE TOUR RESOURCES	NOMINAL HOURS: 40

| UNIT NUMBER: D2.TTG.CL3.02   D2.TTO.CL4.01 ||

| UNIT DESCRIPTOR: This unit deals with skills and knowledge required to assign the necessary human and physical resources to enable the safe, effective and profitable implementation of tour operations. ||

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

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

- Aircraft and other types of transport including live transport such as horse or camels, bikes and motorbikes
- Camping and catering equipment including food, beverages and refreshments
- Safety equipment including first aid kits and communication equipment
- Recreational and activity equipment
- Maintenance equipment
- Educational equipment
- Cash
- Vouchers

- Naming staff required to conduct tour including identification of roles and responsibilities based on experience, qualifications, training and integration of skill sets. Human resources may include:
  - Drivers
  - Tourist guides
  - Driver guides
  - Hosts and hostesses
  - Campsite cooks
  - Interpreters
  - Camp and tour assistants
- Quantifying physical resources by number, amounts, values and volumes
- Quantifying human resources by number and hours.

Availability of physical resources may relate to:
- Cleaning requirements
- Scheduled service
- Repairs and replacements
- Items being used elsewhere, or on other tours
- Purchasing additional items.

Match resources must include:
- Ensuring correct types and amount of physical resources
- Ensuring appropriate staff with required skills, knowledge and experience.

	Comply with budget limitations must include:
	• Ensuring safety is not compromised
	• Obtaining authority for budget over-runs
	• Adjusting resource allocation, where possible, to eliminate cost over-runs.
	Resource information and support may include:
	• Written information including handouts, data sheets, checklists and manufacturer's information and instructions
	• Verbal information including descriptions, cautions and advice
	• Demonstrations
	• Training
	• Practice.
	Issue the identified physical resources may include:
	• Locating the items in storage
	• Removing them from storage
	• Completing internal stock control/management documentation including requisitions, bin cards, stock sheets, computer files and fields
	• Completing tour resource checklists
	• Checking safety and completeness of each item issued
	• Recording identification/serial numbers of items, tickets and vouchers
	• Obtaining signature(s) from tour guide or other colleagues for equipment, cash and vouchers.
	Distribute physical resources may include:
	• Transporting resources to tour destinations including starting points, activity points and refreshment/meal break locations.
	Arrange for third party supply may include:
	• Organising the provision of perishable items from local suppliers and venue
	• Making arrangements regarding vehicle requirements including fuel and service
	• Issuing vouchers for on-site provisions, such as entry, meals, refreshments, samples and rides.

Review actual conduct of tour may include:

- Soliciting feedback from colleagues and customers
- Analysing incident reports.

Resources that need to be revised for subsequent tours may include:

- Purchasing additional equipment to meet emerging need
- Replacing damaged or stolen items
- Complying with new legislated requirements
- Substituting items.

Standard tour-related documentation may include:

- Advertising material
- Tour checklists
- Tour itineraries
- Tour resource stock sheets, duty allocations and rosters
- Plans including emergency responses.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to resource acquisition, purchasing, storage, use, control and allocation
- Principles of control, planning and management of physical and human resources
- Ability to use planning, scheduling, organisational and contingency management skills and techniques
- General industry knowledge in relation to resource requirements for different tour types, groups, locations and customer need.

Linkages To Other Units

- Work as a tour guide
- Drive various types of service vehicles
- Lead tour groups in a responsible manner
- Prepare and present tour commentaries
- Provide arrival and departure assistance

- Carry out vehicle maintenance or minor repairs
- Manage and execute a detailed tour itinerary
- Manage operational risk
- Maintain tourism vehicles in safe and clean operational condition
- Operate and maintain a 4-WD vehicle in safe working condition
- Operate tours in remote areas
- Set up and operate a camp site
- Provide camp site catering.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding the legal and safety implications of providing adequate and suitable resources for tours
- Demonstrated ability to identify, quantify and cost the physical and human resources required to effectively and safely enable the conduct of a nominated tour at a given location for a stated number of customers from a specified market sector
- Demonstrated ability to provide tour staff with necessary information and training to enable them to effectively use a nominated range of physical resources required on a designated tour/tour type
- Demonstrated ability to debrief tour staff with a view to identifying resource modifications and/or requirements for subsequent similar tours.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of resource identification, storage, acquisition and control procedures
- Actual or simulated itineraries for tours of varying durations at various locations for groups of various sizes and various types.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Training and assessment must include the use of real or simulated pre-tour requirements and information and the use of real tour facilities, equipment, resources and staff.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Inspection and assessment of allocated resources against given tour requirements and parameters
- Case studies
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively
Level 2 = competence to manage tasks
Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Capture information to use as the basis for resource identification and allocation
Communicating ideas and information	2	Discuss resource needs with staff
Planning and organising activities	3	Determine resources to be purchased, obtained and allocated for nominated tours
Working with others and in teams	3	Liaise with staff in post-tour debriefings
Using mathematical ideas and techniques	2	Calculate rosters, costings and quantities of resources needed
Solving problems	3	Resolve an equipment shortage situations
Using technology	2	Use calculator to cost resources; operate emergency and communication equipment

Notes and PowerPoint slides

Slide

Slide No	Trainer Notes
1.	Trainer welcomes students to class.

Slide

Slide No	Trainer Notes
2.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What experience have you had with tours? • What is meant by resource allocation? • Why is it important? • What is involved in it?

Slide

Slide No	Trainer Notes
3.	Trainer advises trainees that assessment for this Unit might take several forms, all of which are aimed at verifying they have achieved competency for the Unit as required. Trainer indicates to trainees the methods of assessment that will be applied to them for this Unit.

Slide

Element 1 – Determine resource requirements

Performance Criteria for this Element are:

- Identify factors to determine resource requirements for a tour
- Discuss resource needs with colleagues
- Consider previous tours that have been conducted
- Identify safety & legal issues that must be complied with
- Determine availability of required resources
- Identify specific resources for individual tours
- Prepare short-/long-term plans for resource acquisition.

Slide 4

Slide No	Trainer Notes
4.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What experience have you had with tours? • What is meant by resource allocation? • Why is it important? • What is involved in it?

Slide

Identify factors that will determine resource requirements for a tour

Types/classifications of resources required:

- ◉ Physical
- ◉ Financial
- ◉ Human
- ◉ Information.

Slide 5

Slide No	Trainer Notes

5.	Trainer highlights there are four types of resources which need to be allocated to tours:
	
	• Physical resources – these are the goods/assets needed to support the tour. They include an extremely wide variety of items such as:
	   ▪ Vehicles; Camping equipment; Cooking equipment; Food and beverages; Maps, information sheets and Fact Sheets for tourists
	
	• Financial resources – these are the funds that will be needed to enable the tour to process as planned and operate in whatever circumstances are experienced. Financial resources can include:
	   ▪ Cash in local currency; Cash in currencies of the various countries to be visited; American dollars; Travellers' cheques.
	
	• Human resources – these are the staff provided to support the tour. Human resources can be internal of from outside the organisation and might include:
	   ▪ Tour leaders; Tour guides; Drivers; Cooks; Security
	
	• Information – this is the knowledge required to facilitate tour operations and activities. It includes:
	
	• Local knowledge; Knowledge of countries, carriers, currencies and cultures; Knowledge of all attractions and destinations to be visited; Knowledge of routes and sights; Knowledge of SOPs that tour staff are required to comply with.
	
	Classroom Activity – Discussion/Q&A
	Trainer asks students to identify examples of resources for the four types of resources using the examples listed above as sample answers.

Slide

Slide No	Trainer Notes

6.	Trainer indicates ways to identify resources which might be needed on a tour:
	
	• Research and read tour brochures and promotional materials – to identify what has been advertised for the tour
	
	• Review contracts which relate to the tour – to identify arrangements which have been negotiated and form the basis of this legally binding agreement
	
	• Talk to others – see later slides
	
	• Read end-of-tour de-briefing reports from previous tours – to identify lessons learned when the tour returned/was complete
	
	• Refer to tour-specific resourcing sheets – some operators develop an evolving list of resources required for the different tours they offer.
	   ▪ The list begins with a common sense listing of requirements for the first trip and is up-dated after subsequent tours as other resources are identified as being necessary.
	   ▪ Over time this list can grow into a rich and accurate source of resources required for individual tours types/categories.
	   ▪ Not all operators use this approach.
	
	• Read customer comments/feedback from previous tours – to obtain the tourist perspective about what needs to be maintained and/or changed in relation to resourcing future tours
	
	• Use common sense – this is a very big element when determining resources needed for a tour – management and the people on the tour will expect you to use common sense based on previous experience, personal knowledge and expertise of other trips and tours and knowledge of the activities, climate, terrain, sites, destinations and locations which will be visited.

Slide

Slide No	Trainer Notes

7.	Trainer explains factors that will determine resource requirements for a tour might be related to:
	
	• Type of tour – this is a huge factor as it relates to 'price paid' by travellers and will embrace inclusions advertised as well as customer expectations. As such this will impact on:
	  ▪ Type and quality of resources required
	  ▪ Quantity/volume of resources to be allocated
	  ▪ Vehicle/s required for transportation
	
	• Location of tour – this has particular effect on:
	  ▪ Currencies to be taken
	  ▪ Type of information to be provided
	
	• Duration of tour – this is the length of a tour. It relates to:
	  ▪ Whether the tour is less than a day – if tour are more than a day then accommodation will need to be organised or taken
	  ▪ The longer the tour, the more resources will be required
	
	• Starting and finishing time of tour from the tour operator's premises – these might impact as follows:
	  ▪ Early starts might require transfers/pick-ups to be arranged
	  ▪ Early starts might require the provision of breakfast prior to departure
	  ▪ Late tour finishing times might require accommodation to be arranged for the night after the tour has actually finished
	  ▪ Late tour finishing times might require transportation of tourists to their accommodation after the tour has finished

	Classroom Activity – Discussion Trainer asks students to identify how factors on slide might determine resource requirements for a tour using the examples listed above as sample answers.

Trainer Guide
Allocate tour resources

Slide

Identify factors that will determine resource requirements for a tour

- Size of tour group
- Special needs and special requests
- Types of customers expected

(Continued)

Slide 8

Slide No	Trainer Notes

8.	Trainer continues explaining factors that will determine resource requirements for a tour might be related to:
	
	• Size of tour group – this is a critical factor to be aware of. It is vital to know with 100% surety:
	 ▪ The numbers going on tour
	 ▪ Numbers of any customers leaving the tour group along the way – some tour group members might leave one tour to take up with another group part way through a tour, or they might have elected to stay at a given tour destination for personal, business or family reasons
	 ▪ Those joining the group while on tour – in some cases new customers can join the tour along the way
	
	• Special needs and special requests – many tours require compliance with special needs and/or requests. 'Special needs' generally refers to catering for people who have needs as a result of a disability. Examples might relate to:
	 ▪ Tour group member will be travelling with a carer
	 ▪ Need for wheel chairs
	 ▪ Requirement for special equipment/resources to address identified special need/s
	  – 'Special requests' generally refers to wishes or preferences of customers for certain goods or services to be provided to enhance their satisfaction and experience.
	  – Examples might be:
	   ▪ Including a certain brand of beverage
	   ▪ Staying longer at a certain destination
	   ▪ Certain sleeping and/or seating arrangements

	- Requirements relating to dealing with cultural, religious, health-related or dietary food/beverage concerns - While there is always a limit to what can be done in these regards, most operators try to accommodate what they can • Types of customers expected on tour – this relates to identifying the profile of tour group members as best as possible. Relevant considerations in this regard can relate to determining: - Ratio of males to females - Age/s of people in the group - Number of disabled - Number and age of infants - Any special interest groups which might be travelling/touring and what those interests are - Numbers of repeat/returning customers – and the tours/trips they have previously taken with the operator. **Classroom Activity – Discussion** Trainer asks students to identify how factors on slide might determine resource requirements for a tour using the examples listed above as sample answers.

Slide

Slide No	Trainer Notes

9.	Trainer continues explaining factors that will determine resource requirements for a tour might be related to:
	
	• External resources available – this relates to things available on-tour and/or at tour site from third parties. These items might be arranged in advance of the tour departure to facilitate tour operations and payment for goods and services might be organised using:
	
	• Cash – often at an agreed, discounted rate
	
	• Via vouchers or coupons
	
	• Specific arrangements that have been made – such as tour leader signs for goods and services received and the account is charged back to the organisation for payment
	
	• Tour conditions – this relates to considering the following or expected/anticipated circumstances of the tour and factoring them into the resources to be allocated:
	
	• Weather – in terms of:
	   ▪ Recent previous weather conditions (has there been lots of rain? Has there been excessive heat or cold?)
	   ▪ What is the weather like at the destinations at the moment?
	   ▪ What are the weather forecasts for the destinations for the duration of the tour?
	
	• Environmental issues – attention needs to be paid to issues such as:
	   ▪ Is there local flooding at proposed destinations?
	   ▪ Is there unacceptable smoke or smog?
	   ▪ Is there unacceptable civil/political unrest?

	- Geographical issues – for example: - Is the topography of countries/areas on the itinerary flat or steep and how will that impact transport? - What are the conditions/standards of roads and transport infrastructure and how ill that impact vehicle choice? - Is transport for water and road required? - Understanding activities, products and services advertised for the tour – as this is likely to influence resources in terms of: - Safety equipment and personal protective equipment required - Clothing - Tents - Catering - Type and amount of physical resources required. **Classroom Activity – Discussion** Trainer asks students to identify how factors listed on the slide might determine resource requirements for a tour using the examples listed above as sample answers.

Slide

Slide No	Trainer Notes
10.	Trainer states there are three classifications of colleagues who might be talked to: • Management • Administration • Staff who have been on tour.

Slide

Slide No	Trainer Notes
11.	Trainer identifies reasons to involve management in the discussion:
	• To obtain the benefit of their knowledge and insight
	• To determine their expectations relating to the tour
	• To identify arrangements they might have made with co-chair/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.
	Classroom Activity – Guest Speaker
	Trainer arranges for management/owner to attend and discuss their views on this with class.

Slide

Discuss resource needs with colleagues

Reasons to talk with administration – to:

- Capture data/figures relation to previous similar tours
- Identify human resources available for the tour
- Determine operational/working parameters for the tour
- Obtain budget data
- Determine paperwork/documentation that needs to be completed in relation to capturing required resource allocation and usage for the tour
- Assist with optimising use of limited resources.

Slide 12

Slide No	Trainer Notes
12.	Trainer identifies reasons to involve administration in the discussion: • 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.

Slide

Discuss resource needs with colleagues

Reasons to talk with other staff – to:

⊙ Obtain their advice about what is needed

⊙ Learn lessons they have learned

⊙ Identify/confirm resources being prepared or allocated

⊙ Gain a better 'feeling' for the requirements of the tour

⊙ Ensure items not listed on internal checklists but required are addressed.

Slide 13

Slide No	Trainer Notes

13.	Trainer identifies reasons to involve other staff in the discussion – to:
	• Obtain their advice about what is needed – in terms of:
	  ▪ Identifying and quantifying resources required
	  ▪ Where resources can be obtained when on tour
	  ▪ Feedback they have received from tour group members who have been on the tours being organised
	• Learn from the lessons they have learned from conducting previous tours
	• Identify and/or confirm resources being prepared or allocated
	• Gain a better 'feeling' for the requirements of the tour
	• Ensure items **not listed** on internal documentation/checklists *but which are required* are addressed – many operators use (for example) 'loading sheets' to guide the loading/allocation of resources to tour vehicles.

Slide

Discuss resource needs with colleagues

Topics for discussion:

- Analysing operational issues

- Considering how lack of resources impacts the tour and the tour group members

- Identifying emerging resource needs.

Slide 14

Slide No	Trainer Notes
14.	Trainer gives additional examples of topics which could/should be discussed with colleagues: • Analysing operational issues – which needs to address: - Matters and issues to be undertaken - Timing of such activities - Location of these events - Extent of involvement/engagement by staff, tour group members and external operatives - Equipment and other resources required for each individual 'operational issue' - Risks and risk assessment and management - Action taken by staff to: - Identity, prevent and predict issues - Address and respond to issues - Report and investigate issues - Integration of a range of operational matters across **all** tour types in order to: - Enhance the customer experience - Optimise use of all resource types by the organisation through sharing and effective scheduling

- Considering how lack of resources impacts the tour and the tour group members – these effects might include:

  - Timing of the delivery of services – for example, services listed on itineraries might not be able to be provided at scheduled/advertised times

  - Timing of tour dates and schedules and itineraries – these might all need to change where there is a reduction in staff to conduct tours, and/or insufficient physical resources to support the implementation of tours/tour activities

  - Capacity of tour to deliver activities and inclusions as advertised/as contracted – which might mean:

    - Reduction in services

    - Lowering of quality/standards

    - Shortening of time allocated for activities, events and/or destinations

  - Safety issues – as it relates to:

    - Travel and transport – in terms of lack of equipment on vehicles, lack of service and maintenance to tour vehicles and/or failure of the organisation to ensure drivers are sufficiently trained and experiences in driving the necessary vehicles

    - Engagement with scheduled activities as listed on itineraries

    - Safety of PPE and other items provided by the operator for use (by staff and tour group members) when on tour

- Identifying emerging resource needs – in order for the tour organisation to maintain its market position, viability and general image it is vital employees assist by identifying these needs and taking whatever action they can to ensure these requirements are met. Keys in this process are:

  - Reading customer comment cards/feedback sheets from tour group members who have completed previous/similar tours

  - Talking to the tour guides/tour leaders who conducted previous/similar tours

  - Taking similar tours conducted by other tour organisations – to see what they are doing, what they are offering, how they deliver their tours and the resources they use

  - Ensuring there is a full understanding of all promises made by the tour company to tour group members by:

    - Maintaining full awareness of advertisements regarding tours to be conducted and the inclusions and other undertakings made by the organisation

    - Taking the time to secure total awareness of all tour-related guarantees contained within relevant tour contracts made with tour groups, tour partners and co-chair operators.

Slide

Slide No	Trainer Notes
15.	Trainer advises this aspect of the process should involve: • Obtaining relevant data, statistics and reports, files and documentation • Drilling down into the facts and figures to analyse the information to extract information relevant to the tour being organised.

Slide

Consider previous tours that have been conducted

Things to consider:

⊙ Tour statistics:

- Tour numbers

- Demographics

- Special requests made

- Inclusions

- Duration

- Itineraries

(Continued)

Slide 16

Slide No	Trainer Notes

16.	Trainer identifies/explains things to consider in this respect:
	• Tour statistics – looking at the facts and figures of the tour such as:
	  ▪ Tour numbers
	  ▪ Demographic details of tour group members
	  ▪ Special requests which were made
	  ▪ Destinations, events and attractions
	  ▪ Inclusions
	  ▪ Duration
	  ▪ Itinerary.

Slide

Consider previous tours that have been conducted

◉ Analysis of feedback:

- Evaluations from staff
- Tour group member feedback
- Contributions from strategic partners

(Continued)

Slide 17

Slide No	Trainer Notes

17.	Trainer continues identifying/explaining things to consider in this respect:
	
	• Analysis of feedback –this analysis should factor in:
	  ▪ Evaluation from staff who conducted/participated in the tour so first-hand input from those who were there can be obtained. The basis of this evaluation is traditionally:
	    – Mandatory end-of-tour reports completed by tour guides and tour leaders when they return from tours
	    – Compulsory additional reports required by tour operators such as:
	    – Incident reports
	    – Safety reports
	    – Daily reports/summaries
	    – Reconciliations
	  ▪ Interpretation of verbal and written feedback captured from past tour group members – in terms of:
	    – Feedback gained throughout the tour at designated points for obtaining feedback, such as after certain destinations or activities
	    – Feedback sourced on completion of the tour when the tour party returned and was finalising the tour
	    – Feedback obtained after the tour via written or online feedback and/or through Customer Comment cards
	    – 'Customer satisfaction' – most tour operators will seek *specific* feedback from those who return from tours looking to identify their level of satisfaction

	▪ In general:
	   – **High** levels of satisfaction with a previous tour indicate a need to replicate whatever resources were allocated to the previous tour to the *next* tour
	   – **Low** levels of satisfaction with a previous tour indicate a need to improve or supplement resources allocated to that tour for the *next* tour.
	   – 'Improving' or 'supplementing' resources might mean:
	   – Increasing the amount/quantity of resources allocated
	   – Changing the type/nature of resources provided
	   – Altering the brand of supplies provided to a better quality products
	▪ Contributions from strategic partners – such as:
	   – External/third party providers – such as carriers, transport providers, security providers
	   – Attractions, events, destinations, sites and businesses visited as standard inclusions for the tour
	   – Businesses which supplied services to the tour group such as accommodation, catering, activities, side trips and tours
	   – Joint-venture and co-chair partners including stakeholders such as major business investors and/or associated offices.

Slide

Consider previous tours that have been conducted

- Investigating 'reportable events':
  - Accidents
  - Incidents
  - Near misses.

Slide 18

Slide No	Trainer Notes
18.	Trainer continues identifying/explaining things to consider in this respect: • Investigating 'reportable events' from previous tours – these are occurrences which the tour operator demands must be reported on by tour staff. That is, reporting is compulsory for all of these events. 'Reportable events' are generally classified as: ▪ Accidents – where an occurrence resulted in actual injury to a person or damage to property belonging to a tour group member, the tour operator or a business or organisation where the tour operated ▪ Incidents – where (for example) there was a breach of tour operator protocols while on tour (such as a breach of security or safety) ▪ Near misses – where something occurred which could have easily resulted in an accident but did not actually result in an accident.

Slide

Slide No	Trainer Notes
19.	Trainer explains this research and analysis needs to be done in order to:
	• Gain a frame of reference for comparison purposes – the process helps describe what others did for similar tours and what results they achieved/experienced or produced
	• Obtain actual examples of resources used for those tours – so these can be used as a basis for the next allocations
	• Determine end-of-tour input from staff regarding suitability and sufficiency of resources provided – so lessons learned from previous tours can be applied to upcoming tours.

Slide

Identify safety and legal issues that must be complied with

Duty of Care – all businesses must:

- Create an environment which does not pose a risk

- Take action to avoid causing foreseeable harm.

Slide 20

Slide No	Trainer Notes
20.	Trainer notes 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. • This requirement applies to all organisations.

Slide

Identify safety and legal issues that must be complied with

If tour operator breaches Duty of Care:

- They might be sued for negligence

- Successful cases result in 'Damages' being awarded.

Slide 21

Slide No	Trainer Notes
21.	Trainer advises if business breaches Duty of Care they might be sued for negligence and successful cases result might result in the awarding of damages.

Trainer Guide
Allocate tour resources

Slide

Slide No	Trainer Notes
22.	Trainer gives ways to identify safety and legal issues which might require compliance from the point of view of allocating resources for tours: • Talk to management • Seek advice from government-based 'Health, safety and welfare' agencies • Search the web for information/requirements in other countries to be visited • Ask industry bodies for their advice • Speak with employees in other tour operating businesses who have responsibility for loading/allocating resources for tours • Read advertising materials and/or contracts relating to the tour – to determine what has been promised and what needs to be provided • Undertake formal risk management activities as appropriate to the tour type and proposed inclusions/activities.

Slide

Identify safety and legal issues that must be complied with

Risk management – formal procedure comprising:

◉ Risk identification

◉ Risk analysis and assessment

◉ Risk management.

Slide 23

Slide No	Trainer Notes
23.	Trainer notes:
	• Risk can be seen as any hazard or source of danger with the potential to adversely impact on the operation and/or outcomes of a tour
	• Risk management is the term used to describe the activities and practices the business undertakes to address those hazards or sources of danger
	• Formal risk management requires the tour operator to undertake a structured procedure comprising:
	▪ Risk identification – where action is taken to determine all possible risks which might apply/pertain to the tour
	▪ 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 management – where acceptable/suitable protocols are provided to effectively manage the identified risks.

Slide

Identify safety and legal issues that must be complied with

SOP is all staff and tours must comply with:

⊙ Relevant Tourist Guide legislation/requirements

⊙ Host country laws

⊙ Laws of countries visited by the tour

⊙ Legislation applicable to activities/inclusions.

Slide 24

Slide No	Trainer Notes
24.	Trainer notes it is a standard procedure all employees and tours must comply with all relevant legislation explaining in practice this means operators must identify and meet all requirements and regulations: • Applicable specifically to tours and Tour Guides – where such legislation exists • Applicable in their host country • Applicable in different countries they visit/lead tours to • Applicable to all activities undertaken on tour.

Slide

Slide No	Trainer Notes
25.	Trainer emphasises: • Employers might be vicariously liable for the actions of their staff • Employees **do not have a legal defence** if they commit an offence because their employer told them to break or ignore a law.

Slide

Identify safety and legal issues that must be complied with

In general terms there is a need to:

- Ensure vehicles are safe/roadworthy
- Make sure drivers are properly licensed
- Provide all necessary PPE
- Produce and provide necessary safety information

(Continued)

Slide 26

Slide No	Trainer Notes
26.	Trainer states in general terms there will be a need to: • Ensure vehicles used are safe and comply with relevant in-country requirements in terms of: 　▪ Roadworthiness; Registration; Insurance. 　▪ Provide regular service and maintenance to vehicles – to optimise their serviceability and reduce the potential for breakdown or accident • Make sure drivers of vehicles: 　▪ Are licensed to drive the type of vehicle they are driving – special requirements might apply to certain types of vehicles and/or vehicles over set weights or lengths (or other dimensions); Hold a valid and current licence of the type/s required in all countries to be visited • Provide all necessary PPE for all tour group members (and staff) – in order to: 　▪ Enable them to participate in scheduled activities, sports, events, games and other inclusions. For example when conducting white water rafting or kayaking there would be a need to provide high-visibility life jackets/PFD, safety/white water helmets, knee and elbow pads, whistles, rescue ropes, rescue rope throw bags, neoprene booties, white water knives, padded gloves. 　▪ Protect them from naturally occurring harm (including sunburn) when on tour • 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 – it can never be assumed: 　▪ Customers will know even the most obvious risks 　▪ Tour group members will know what to do to cope with those dangers, avoid damage or injury or otherwise protect themselves or their property.

Slide

Identify safety and legal issues that must be complied with

- Develop and resource Emergency Management Plans
- Provide lights for night tours
- Provide support systems and technologies
- Supply First Aid kit.

Slide 27

Slide No	Trainer Notes

27.	Trainer continues giving general requirements stating there will be a need to:
	
	• Develop, possess and know the contents of a range of Emergency Management Plans – to cope with possible emergencies which can be reasonably foreseen for the tour type which is about to occur.
	
	   ▪ The tour operator is also responsible for ensuring these EMPs have been shared with tour staff and they have had opportunity to practice/drill in their requirements.
	
	   ▪ All necessary supporting resources to enable the EMP to be implemented, as written, must also be provided.
	
	• Provide lighting for situations where tour group members will be spending time at night, outside in the dark. Resources in this area can include:
	
	   ▪ A generator; Portable lighting; Hand-held torches; Helmet-mounted lights
	
	• Provide required support systems and technology as appropriate to the tour type and destinations to be visited – this can relate to the need to:
	
	   ▪ Ensure fire fighting equipment (extinguishers, fire blankets) are provided in situations where fires are going to be lit – such as fires for cooking, or camp fires to generate atmosphere
	
	   ▪ Make sure vehicles are fitted with:
	
	      – Fire extinguishers
	
	      – Communication equipment – such as portable radio/radio in tour vehicle, cell phone/s, satellite phone and/or emergency beacon, locator beacon or distress/survival beacon

	– Vehicle recovery equipment – high-lift jacks, winches, tyre deflators and pumps, sand tracks – Suitable lights – for night driving - Supply a suitable first aid kit – as recommended by relevant authorities and appropriate to the potential injuries which could reasonably be anticipated for the tour. ▪ Attention should also be paid to ensuring someone (at least one staff member) on the tour has qualified as a First Aid provider and has current status as such. ▪ Where the Tour Guide/Leader will be taking a walking component/inclusion on the trip a portable first aid kit might also be called for and there might be a need to issue whistles to tour group members in some conditions.

Slide

Slide No	Trainer Notes
28.	Trainer identifies ways to determine resource availability for an upcoming tour:

- Determine the items readily/currently available – this will relate to items:
  - Already loaded onto vehicles and commonly present there as part of SOPs for each vehicle
  - Located in store rooms within the tour operators building/s and/or vehicles – and ready for immediate use/allocation as required
  - Located at a remote location – these can be items:
    - Stowed in another office of the business in another city or country
    - Stored at the business premises of a joint venture partner
- Review the tour schedule – to identify the tours which need to have resources allocated to them *and* to identify resources already being used/already allocated so there is a full understanding of:
  - Where resources are
  - When they can be expected to become available again
- Review orders placed with suppliers – to gain an understanding of what is expected to be delivered to the tour operator in the immediate future.
  - These items should be added to the items listed as already available

Slide

Slide No	Trainer Notes
29.	Trainer continues identifying ways to determine resource availability for an upcoming tour: • Review third-party providers used by the tour operator for supplying goods and services when groups are on-tour – as these providers are often essential resource providers on which most/many tour operators rely. ▪ If there are no problems with these providers, then the items/services they can deliver should/can also be added to the list of what is available. • Review items which are out-of-operation – these might be items which are: ▪ Lost/stolen ▪ Damaged or malfunctioning and cannot be used ▪ Being repaired ▪ Being serviced/maintained. • Review rosters – to identify: ▪ Classifications of employees available for work – guides, drivers, cooks, hosts, interpreters ▪ Who is available – many of the resource allocation decisions made about staff will depend on the individual staff member and their experience and expertise. – Not all cooks are the same; not all tour leaders have the same capacity or abilities. ▪ Their availability to work – with reference to days and hours. • Check relevant budgets – to determine: ▪ Money which has been spent ▪ Available funds.

Slide

Slide No	Trainer Notes

30.	Trainer discusses needs for one-off individual/specialist tours stating:
	
	• Their needs are unique
	
	• The contract for the tour plus discussions with the group must form the basis of what is required
	
	• Inferences can be made with reference to:
	   ▪ Stated destinations they want to visit
	   ▪ Indicated transport they want to use
	   ▪ Dictated timing and duration
	   ▪ Stipulated activities they want to engage in
	   ▪ Identified accommodation, catering and other tour-related services, products and inclusions which will comprise the total package.

Slide

Slide No	Trainer Notes

31.	Trainer discusses regular tours which might have individual need based on:
	
	• Weather conditions – for example:
	  ▪ Rain might require provision of umbrellas and wet weather gear
	  ▪ Prolonged bad weather might mean a 4WD vehicle is used rather than the normal/standard two-wheel drive vehicle
	  ▪ Severe cold conditions might require supply of thermal clothing
	  ▪ Sunny conditions might mean a need for sunscreen, sun glasses, umbrellas
	
	• Time of day:
	  ▪ For 'after dark' tours there can be a need to provide hand-held torches for staff and tour groups members or cap/helmet lights
	  ▪ Tours occurring mid-morning and/or mid-afternoon can necessitate provision of catering (facilities and food) to allow the preparation and service of a morning/afternoon tea
	  ▪ Tours occurring over a recognised meal period will/might likewise necessitate supply of catering for a breakfast, lunch or dinner unless alternate/outside catering arrangements have been made
	
	• Special needs tour group members – some tour vehicles carry standard special needs equipment (fold-up wheel chairs, ramps) but other items will need to be provided on the basis of pre-notification of needs for certain individuals or tour groups. Resources in this instance might be:
	  ▪ Staff (human resources) with experience with certain disabilities and with certain skills such as signing (for the hearing impaired)
	  ▪ Specified provisions to support those who are carers – many/most supply their own needs but on occasion (especially with overseas visitors) there can be a need to supply items/equipment and products 'as advised'

	▪ Handouts (information, advice, maps, instructions etc.) in: – Large print – for vision impaired – Different languages – to meet the needs of different language speakers • Changes to routes and inclusions – there are lots of reasons why routes and inclusions for a regular tour need to change. It is important when these changes are imposed on the itinerary attention is paid to working out whether or not the variations necessitate more or different resources than usually provided for the normal/regular tour. For example: ▪ A different road route might require a different vehicle ▪ A different walking route might impose demands on footwear or walking sticks plus water – or impose health-related restrictions on those who can participate ▪ A change to activities can mean a need for new information/advice sheets plus the need to provide different PPE.

Slide

Identify specific resources for individual tours

Physical resource variations can relate to:

- Vehicles and vessels
- Camping gear
- Catering equipment
- Food and beverages
- Safety gear
- Rec. and activity equipment

(Continued)

Slide 32

Slide No	Trainer Notes
32.	Trainer identifies there can be a need for variations to physical resources in terms of: • Vehicles and vessels – which might include aircraft and other types of transport, including live transport (such as horse or camels), bikes and motorbikes • Camping equipment and requisites • Catering equipment – covering cooking equipment, holding units (for hot and cold and frozen food) and food service units and utensils • Food, beverages and refreshments • Safety equipment – including PPE, first aid kits, rescue and recovery gear and communication equipment • Recreational and activity equipment – sports equipment, play gear.

Slide

Identify specific resources for individual tours

- ◉ Maintenance equipment
- ◉ Educational resources
- ◉ Cash
- ◉ Vouchers.

Slide 33

Slide No	Trainer Notes
33.	Trainer continues identifying examples of possible variations to physical resources: • Maintenance equipment – tool kits, spare parts, service manuals, oils and filters • Educational equipment – handouts, props and materials, consumables • Cash – for unexpected and out-of-pocket expenses which cannot be paid for on the business credit card, cannot be charged back to the operator or where travellers' cheques are not accepted • Vouchers – these are the coupons given to tour group members enabling them to obtain certain products/services as appropriate to each individual voucher. For example a voucher might entitle the holder to: ▪ Entry to an attraction ▪ Accommodation ▪ Meals, food, drink, refreshments ▪ Rides and games ▪ Merchandise ▪ Photographs.

Slide

Slide No	Trainer Notes
34.	Trainer advises it is important to list physical resources by: • Type • Number, volumes, amounts/quantity required • Monetary values • Physical location.

Slide

Identify specific resources for individual tours

Process of identifying human resources means:

- Naming staff to be used

- Determining roles and responsibilities

- Verifying hours to be worked.

Slide 35

Slide No	Trainer Notes
35.	Trainer indicates the process of identifying staff for certain tours in reality means:
	• Naming staff to be used for each tour
	• Determining roles and responsibilities for each identified staff members – based on the experience, qualifications, training and integration of skill sets for each employee to ensure all requirements are covered off
	• Making sure hours worked by staff allocated:
	▪ Reflect rostered hours
	▪ Are sufficient to enable delivery of required services and required service levels/standards
	▪ Are in accordance with employment instruments under which employees work – in order to eliminate/minimise the need to pay excess labour payments.

Slide

Slide No	Trainer Notes
36.	Trainer advises human resources might include: • Drivers • Tourist guides • Tour leaders • Driver guides • Hosts and hostesses • Activity leaders • Campsite cooks • Interpreters • Camp and tour assistants.

Slide

Slide No	Trainer Notes
37.	Trainer observes human resources must be described by: • Classification • Number • Hours • Projected wages/labour cost.

Slide

Slide No	Trainer Notes
38.	Trainer highlights presence of standard Exclusion Clauses stating these statements might address the following:
• The operator can change the itinerary – at any time and at their discretion
• The organisation can change the vehicle/method of transport originally offered or advertised'
• The business can sub-contract advertised services to another operator in certain situations
• The tour business reserves the right to substitute nominated accommodation and/or catering arrangements
• No eligibility for discount, refund or cancellation is created when a change to an itinerary or inclusions occurs.
Classroom Activity – Handouts
Trainer distributes and discusses sample Exclusion Clauses from a range of tour operators for a diversity of tours.

Slide

Slide No	Trainer Notes
39.	Trainer states in situations where the business needs to make changes to their advertised itinerary they will always be aware of the need for them to ensure the alternative they offer/introduce:
	• Represents **from the customer's point of view** a viable substitute for whatever has had to be removed/cancelled
	• Is comparative 'value-for-money' in terms of the money paid by customers for their tickets?

Slide

Slide No	Trainer Notes
40.	Trainer states where a business has to make changes to their advertised itinerary and/or inclusions they might:
	• Advise those who have booked a tour as soon as possible – explaining the change/s and the reason/s behind the change
	• Apologise for the change – perhaps giving the customer the option to:
	▪ Cancel their booking – this is not an option commonly offered
	▪ Pay a reduced price
	▪ Join a later tour which will follow the original itinerary and feature the inclusion which has to be deleted/changed now
	• Substitute the changed item with another item – by:
	▪ Replacing it with a similar alternative
	▪ Including another destination, activity of similar duration and which can be seen as having similar value
	• Amend the itinerary – by:
	▪ Changing times at other destinations/locations and/or activities
	▪ Altering transportation used
	▪ Revising tour start and finish dates and/or times
	• Offer products and/or services by way of apology – this might include;
	▪ Supply of nominated merchandise to customers
	▪ Provision of discount voucher for subsequent tours and/or other products/services available from the tour operator.
	Classroom Activity – Role Play
	Trainer conducts role play demonstrating points listed on the slide providing opportunity for students to do same.

Slide

Slide No	Trainer Notes
41.	Trainer suggests the following can be effective options for addressing identified problems with resource requirements in the short-term:
	• Imposing a short delay to the departure of the tour or the start of an activity – while identified/required resources are obtained. This course of action is usually supplemented by:
	▪ An apology
	▪ An explanation
	▪ Refreshments or food and beverages
	• Moving required resources from one place to another – this can mean:
	▪ Moving items from one tour vehicle to another
	▪ Shifting items from the prepared 'tour stock' of one tour to a tour about to depart or an activity about to commence
	▪ Taking resources out of the supplies/stock (store room) of the operator and re-locating to a tour, tour vehicle or tour group
	• Obtaining required resources in the immediate short-term – this might be able to be achieved by:
	▪ Contacting another tour operator (even a business which is direct competition) and asking to borrow required items from them – in many cases there is an effective working relationship' for mutual benefit between many competitors
	• Telephoning suppliers and organising 'emergency' provision of required items – which might include:
	▪ The tour bus/vehicle picking up requirements *en route*
	▪ Paying for a courier to make a special delivery of the required items from the supplier to the tour business

	- Contacting destinations and attractions – and making enquiries in relation to: - Whether they have their own resources as required for the tour - If they are willing/able to loan or hire them to the tour operator - Determining quantities and condition/safety of their resources - Negotiating a mutually acceptable rental price - Relying on the Terms and Conditions clauses in the Tour Contract/Agreements – and: - Amending the tour as required - Substituting the advertised tour with a pre-planned 'Plan B' – an approved/authorised tour which has already been arranged as part of the organisation's risk management and contingency planning activities.

Slide

Prepare short- and long-term plans for resource acquisition

Long-term plans might include:

- ◉ Acquire/purchase extra items
- ◉ Service items
- ◉ Amend standard tours
- ◉ Develop new tours.

Slide 42

Slide No	Trainer Notes
42.	Trainer explains the business might elect to look at one or more of the following in term so long-term plans to address identified resource problems/requirements: • Acquire extra resources as identified –which might involve: ▪ Purchasing items ▪ Leasing items • Service items – which means organising and providing repairs and maintenance in order to return unsafe/unusable items back to a required standard of serviceability • Amend current standard tours – by: ▪ Changing the itineraries and inclusions as necessary on the basis of the resource issue applying ▪ Changing all internal and external advertising and promotional materials used to market the tour/s • Develop new tours – on the basis of: ▪ Removing inclusions, activities, destinations etc. which can no longer be included because of the resource issue – and not relacing these with anything else ▪ Substituting alternative inclusions, activities, destinations for those which have been removed ▪ Changing the name/focus of the tour ▪ Altering the price of tickets for the tour.

Slide

Slide No	Trainer Notes
43.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
44.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
45.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
46.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Element 2 – Allocate resources

Performance Criteria for this Element are:

- ⊙ Coordinate the availability of physical resources

- ⊙ Match resources to identified tour requirements

- ⊙ Comply with budget limitations when allocating resources

- ⊙ Provide resource information and support to colleagues

(Continued)

Slide 47

Slide No	Trainer Notes
47.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.

Slide

Slide No	Trainer Notes
48.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide.
	Class Activity – General Discussion
	Trainer leads a general class discussion by asking questions such as:
	• What do you think is involved in allocating resources for tours?
	• Why is resource allocation so important?
	• How would you expect to learn about the procedures for allocating resources to tours?
	• What documentation might be necessary to control and/or assist with resource allocation?
	• Who would you expect to work with the make sure resources are properly allocated?

Slide

Slide No	Trainer Notes

49.	Trainer advises the factors affecting what resources are available for upcoming tours include:
	
	• Other tours currently being conducted at the time – by type, number, destination and number of tour group members.
	    ▪ The resources already allocated to these tours will normally be unavailable however timing coupled with the nature of the item is the critical element here
	    ▪ For example, a tour returning at 10:00 today might allow *certain* resources to be off-loaded from that tour and stowed immediately on to a bus ready for another tour at 12:00.
	    ▪ Obviously where items need cleaning/repairs/service this will not be the case
	• Level of physical stock-on-hand – the amount of inventory kept by the business to service tour needs: while this stock can be supplemented by additional purchases there is always a lag/lead time before new stock can be obtained
	• Tour schedules – which will identify the specific requirements/demand placed on the limited supplies by other tours which are also scheduled to depart/be conducted at the same time as other tours.

Slide

Slide No	Trainer Notes

50.	Trainer continues talking of factors affecting what resources are available for upcoming tours:
	
	• Cleaning requirements – where items need to be cleaned and/or sanitised, a suitable time must be allowed for this process to occur.
	  ▪ For example, tents will need to be cleaned, vehicles will need to be washed and protective clothing worn by participants will need to be laundered
	
	• Servicing and maintenance requirements – many resources need to be regularly serviced to maintain their operational status/efficiency and/or to keep them in a safe operating condition.
	  ▪ Safety equipment will need testing, camping equipment might require repairs and buses and 4WDs will need scheduled servicing and minor repairs to maintain their roadworthiness
	
	• Staff development activities – while this is not a large consideration there can be times when certain staff are unavailable because they are being trained, visiting new destinations, learning new skills, and/or undertaking testing or certification.
	  ▪ Other staff-related issues can also cause short-term impacts on the availability of human resources – such as staff sickness, leave, accidents and rostered time off.

Trainer Guide
Allocate tour resources

Slide

Slide No	Trainer Notes
51.	Trainer indicates ways to assist with the coordination of resources for tours include:
	• Tour load sheets – these are the sheets developed for individual tours which list all required physical resources by type and quantity – and when they are obtained and stowed ready for use (in a vehicle, in a bay or in a tour box) they are ticked off on the sheet to show they are available and ready to go
	▪ Workplace white board – some businesses use a white board which staff can use to write up any items they require for an upcoming tour.
	– A designated person then follows this up to determine if the item can/should be provided and takes appropriate action to obtain same if deemed necessary.
	– Some businesses use a register/book as an alternative to this
	• Restrictions on access by staff to store areas and inventory stocks – it is standard practice for most tour businesses to heavily restrict the personnel who are authorised to enter store areas.
	▪ This is done to prevent staff 'helping themselves' to items which might have been ear-marked for allocation to another tour/group
	▪ In the same way there can often be a total ban on the movement of any stock from inventory/stores unless accompanied by a suitably authorised and signed Requisition Form or similar
	• Just-In-Time (JIT) provision of resources for tours – this is an option where the resources for a tour arte not organised/allocated in advance suing load sheets but are determined shortly/immediately before the tour departs based on actual numbers participating in the tour.
	▪ In these instances maximum persons are set for each tour (so the top numbers for a tour are always known) and the *actual* resources required reflects the *actual* tour group numbers rather than a theoretical figure.

Slide

Slide No	Trainer Notes
52.	Trainer discussing matching resources to requirements stating in many ways this stage of resource allocation is the simplest and easiest of all the processes in resource allocation for tours **providing proper planning and preparation has taken place** because it means all the hard work has already been done and the activities required are merely a case of:
	• Providing the correct type of resources – as identified (physical, human, financial, information)
	• Providing the identified quantities of each resource
	• Stowing/stocking each item as identified – in a vehicle, in an information pack, in a box or some other tour container
	• Providing each item by the time required.
	This is summed up by the industry as providing:
	• "The right items in the right location, at the right time and in the right quantity."

Slide

Slide No	Trainer Notes
53.	Trainer discusses final checks saying: • Inspections of each physical item required need to be undertaken as items are loaded or handed over. • SOP might be for the tour guide/leader to sign for items given to them/provided for the tour verifying the items are 'all present and correct' in terms of type, quantity and 'fitness for purpose'. ▪ When they sign these lists/sheets they are assuming responsibility for the items and this list forms the basis of the checks made when the tour returns and items are unloaded prior to cleaning, servicing, re-stocking etc.

Slide

Slide No	Trainer Notes
54.	Trainer talks about 'Last minute additions' highlighting many tours have special requests which need to be accommodated and while many of these are pre-planned in advance, many also require last-minute additions to the standard set of resources provided. In relation to these late inclusions attention must be paid to ensure: • Extra items are added to loading sheets as required • Extra charges (where legitimate) are levied against tour group members so the business recoups money it has expended • Good ideas for including these extra items as standard inclusions on other tours are captured and integrated elsewhere into the SOPs of the organisation • Adjustments to existing plans are made where a last-minute inclusion for *this* tour has meant resources have been taken from stock/resources allocated to another tour.

Slide

Slide No	Trainer Notes
55.	Trainer identifies and differentiates between 'fixed' and 'variable' resources: • Fixed resources are the resources allocated to a tour independent of other factors. ▪ Regardless of these other factors (number of destinations, number of stops, duration, weather, time of day, number of tour group members and similar) these resources will always stay the same as determined/identified by the organisation for that tour • Variable resources are those which vary as the details of the trip vary. For example: ▪ As the duration of the tour increases, the amount of resources required goes up – as duration falls so do the resources required ▪ As the number of tour group participants grows, so too does the need for more resources – as the number of participants drops so is there a corresponding reduction in resources required. – Previous experience (that is, what has been used before on earlier similar trips) is the best indicator of requirements in terms of variable resources. – This highlights the need for keeping accurate records of resource allocation as discussed in Element 3.

Slide

Comply with budget limitations when allocating resources

Practical considerations when meeting budget limitations:

⊙ Must meet contracted demand/promises

⊙ Must ensure consistency with previous tours

⊙ Must guarantee safety

(Continued)

Slide 56

Slide No	Trainer Notes

56.	Trainer identifies practical considerations when meeting budget limitations stating it is always necessary to:
	
	• Meet contracted demand/promises – anything advertised for a tour must be delivered.
	  ▪ Any clauses in a special contract must be filled
	  ▪ Special requests must be accommodated where participants have been advised they will be met
	• Ensure the standards and resources which applied to previous tours also apply to this/the next tours – this is the way the organisation builds its reputation, credibility and business.
	  ▪ There must be consistency in what is delivered on all tours
	• Guarantee the safety of all tour group members – so resources must be sufficient to enable this or alternative action must be taken. Alternative action might be to:
	  ▪ Notify Tour Guide/Leader of the reduced (for example) equipment/PPE and advise either:
	    – A reduction in the number of people who can participate at any one time
	    – Borrowing additional items at the destination/attraction
	• Advise tour prior to departure there has been a need to make a change to the advertised schedule/itinerary – and a substitute activity will need to be included so safety is not compromised by the reduction in necessary equipment.

Slide

Slide No	Trainer Notes
57.	Trainer continues discussing practical considerations when meeting budget limitations:

- Consider adjusting resource allocation, where possible, to eliminate cost over-runs – this might be possible for example:
    - In terms of catering provisions – it might be possible to replace a higher-cost food/beverage item with a lower quality/brand option to help keep costs under control. This might have to be negotiated with Cooks etc. as it will be their job to provide the quality end-product the participants expect
    - By way of merchandise provided – where the tour company has not specified exactly what merchandise it supplies to group members it is nearly always possible to reduce quantity of items handed out or cost-shift by offering a lower-value item
- Search for the 'least worst' option – this means in situations where there is going to be a cost-overrun attention MUST be paid to seeking out the least expensive of all the negative options available.
    - This highlights sometimes it is quite simply unavoidable to 'meet budget' for a tour so the second-best choice is the outcome which disadvantages the organisation the least
    - When deciding which options to choose in this scenario care must be taken to consider not only the strictly physical and financial implications of the choice made but also:
        - Potential for dissatisfied customers to sue/take legal action
        - Possibility of damage to the reputation/goodwill of the business

	• Gain permission for budget over-runs where these simply cannot be avoided – while operators will generally give some degree of flexibility to workers in this regard (for example, staff might be allowed a nominated small percentage above-budget, or a given monetary amount) it is still SOP to request authority for 'substantial' extra expenditure. ▪ This request will usually need to be accompanied by rationale/reason for the increased costs so management/administrations can determine: – Whether the cost is worth it – or if it is more cost-effective to simply under-resource the tour and deal with whatever consequences might emerge as a result – If a review of the tour is necessary in terms of the type of activities/inclusions, tour group numbers and/or ticket prices ▪ In some cases permission to exceed budget *now* might be accompanied by a demand to retrieve the financial outlay by making corresponding savings somewhere else at a later time/on a subsequent tour.

Slide

Provide resource information and support to colleagues

Common methods of notification:

⊙ At staff meetings

⊙ With Tour Leaders/Guides

⊙ Using hard copy formats:

• Internal 'Resource Updates/Alerts'

• Communications Book

• Loading sheets

• U/A sheets

(Continued)

Slide 58

Slide No	Trainer Notes
58.	Trainer discusses methods of notification stressing a variety/mix of options is commonly used to notify others in regard to information about resource allocations to tours and identifying advice is typically communicated: • Face-to-face at daily staff meetings – held at the start of the day or shift • To Tour Guides/Leaders when they return after a tour • Via emails • Using one of many popular hard-copy written formats – such as: ▪ Specially-designed internal 'Resource Updates/Alerts' ▪ A general-purpose Communications Book – located near the time sheets/time clock which all staff are required to read/sign when they arrive for work ▪ Stock sheets – showing stock-on-hand ▪ Loading sheets – showing items loaded onto vehicles ▪ U/A sheets – showing stock/items which are unavailable because (for example) they are being repaired, serviced, replaced. **Classroom Activity – Handouts** Trainer distributes and discusses documents identified on the slide.

Slide

Slide No	Trainer Notes

59.	Trainer continues identifying and describing methods of notification:
	
	• Using an electronic database with relevant files and fields – to show location of items at any point in time, for example:
	   - In-stock – available and in the stores ready for use if required - Reserved – available but allocated to an upcoming tour on a certain day/s - O-O-O = Out Of Order – and reason for same with expected date of return to service/availability - On Tour = shows items being currently used and indicating:
	  – Tour name/type
	  – Date/time out
	  – Date/time expected back in. • Addressing all resource types – this means there will be a sharing of information about:
	   - Physical resources – see above and immediately below - Staffing – relating to availability of Guides, Leaders and other support staff - Finances – advising about the budget position as it applies to resource acquisition/replacement - Information – and the currency and comprehensiveness of same.

Slide

Provide resource information and support to colleagues

It is important to communicate this information to:

⊙ Allow everyone to know:

    • What is/is not available and when it is/is not available

⊙ Assist with planning of tours – so:

    • Resources can be booked for dates needed

    • New tours can be developed using existing resources

    • Options can be considered

    • Old stock can be sold

    • Necessary training and planning can take place

(Continued)

Slide 60

Slide No	Trainer Notes

60.	Trainer talks about importance of communicating this information highlighting it needs to be communicated to:
	
	• Allow everyone to know:
	  ▪ What is available – and when it is available
	  ▪ When it is not available, why it is not and when it will be available
	• Assist with planning of tours – so:
	  ▪ Required resources can be booked in advance against known tour dates/times for specific parties, special requests or special events/seasonal activities
	  ▪ New tours can be developed using existing resources to the best extent possible – thereby reducing expenditure while optimising revenue
	  ▪ Options for activities and inclusions can be planned/organised where it is known there will be a clash of demand or certain resources are on high rotation/are in short-supply
	  ▪ Old/dead stock (stock no longer required/being used) can be sold – to raise cash, make room for new items and keep resources 'looking new'
	  ▪ Sufficient time can be allowed to:
	    – Enable suitable research to occur into and testing of new resources
	    – Allow time for negotiation of deals, delivery of items and training of staff in their use.

Slide

Provide resource information and support to colleagues

- Provide information and advice to staff – in various forms:
    - Verbal advice
    - Cautions and warnings
    - Handouts and Fact Sheets
    - User Instructions and Service/Repair Manuals
    - Checklists
    - Demonstrations
    - SOPs
- Enable staff to pass on information to others.

Slide 61

Slide No	Trainer Notes
61.	Trainer continues talking about importance of communicating this information highlighting it needs to be communicated to: • Provide advice and information to staff about resources – this might be provided in the form of: ▪ Verbal advice ▪ Cautions and warnings regarding use of items, exclusion clauses, guarantees and warranties ▪ Handouts and Fact Sheets ▪ Manufacturer's information ▪ User Instructions and Service/Repair Manuals ▪ Operational Checklists developed specifically to support the use of nominated items to ensure their safe and optimum use ▪ Demonstrations – combined with the opportunity for staff to practice using the items ▪ New/revised SOPs and company polices – as required by changes in resource availability/type. For example, an absence of one type of resource might trigger activation of an established contingency plan • Enable employees to pass on relevant information to tour group members about certain resources and/or specific aspects of certain resources – at pre-departure briefings, prior to activities and/or when on tour. **Classroom Activity – Handouts** Trainer distributes and discusses documents identified on the slide.

Slide

Issue the identified physical resources as identified

The following activities might be required:

- Separating identified items from available stock in the inventory/store room(s)
- Removing items from store ready for pick-up/collection
- Physically counting items
- Inspecting items
- Notifying tour staff as appropriate

(Continued)

Slide 62

Slide No	Trainer Notes
62.	Trainer states issuing physical resources can require the following activities:
	• Separating the identified items from other stock available in the store area – so the required items are ready for trans[ort, distribution, hand-over or stowing as required
	• Removing identified items from storage ready for use/collection
	• Counting items – to ensure required number are provided
	• Inspecting items – to verify safety, suitability and sufficiency
	• Notifying tour staff to come and collect items from the store – in accordance with advice/loading sheets provided to them the previous day.

Slide

Slide No	Trainer Notes
63.	Trainer continues identifying activities which might be involved in issuing physical resources:
 • Driving tour vehicles to the store area – to facilitate loading the vehicles as required for the individual tour
 • Loading items onto tour vehicles
 • Stowing items in patrol boxes, tour wallets and other storage containers
 • Refrigerating and freezing foodstuffs
 • Rotating stock – which is usually done using the FIFO method of stock control where the first item taken into the store is the first one handed out when items are provided/distributed.

Classroom Activity – Guest Speaker
Trainer arranges for person who allocates tour resources to attend and talk to students about:
 • Their job and the tasks they undertake on a regular basis so class gets an understanding of what the job is all about
 • How they got into their job
 • The good and bad parts of the job
 • Things they would suggest students do to increase chance of getting a job
 • The people they interact/work with and the nature of those relationships. |

Slide

Slide No	Trainer Notes
64.	Trainer continues identifying activities which might be involved in issuing physical resources:

• Spot cleaning – to items as required to maintain their appearance: even though items might have been cleaned prior to storage (or as part of their service/maintenance) it is always worth paying attention to the possible need to enhance appearances by a quick wipe/clean immediately on release

• Adhering to planned numbers and items – perhaps one of the biggest mistakes people make when issuing identified resources to tours is to provide additional items to what was planned to be issued, and to provide extra amounts/numbers.

   ▪ This is to be avoided at all costs as it comprises the financial viability/performance of the organisation and also potentially jeopardises other tours who might be themselves be relying on the items which were over-supplied.

• Actively and physically controlling the issuing process – it is when stores/resources are being handed out many tour staff try to create an opportunity for themselves to take more than what they have been allocated.

   ▪ This might be for personal gain or simply to satisfy a feeling they 'believe' they will need more than what has been assigned to them.

   ▪ This too must be avoided at all costs.

   ▪ One or two items does not sound like much but if this occurs for every staff member for every tour it does not take long for substantial cost over-runs to mount up threatening the profitable operation of the business.

   ▪ The operation of the issuing process must be characterised by strict adherence to providing only what has been allocated and ensuring no-one takes anything they have not been assigned. |

	Classroom Activity – Excursion
	Trainer arranges visit to local tour operator so class can:
	- Talk to management about allocation of resources for tours - Talk to staff who allocate resources for tours - View organisational stores and inventory - Observe resource control and allocation practices - Obtain copies of documentation related to tour resource allocation, management and control - Obtain copies of relevant SOPs.

Slide

Issue the identified physical resources as identified

Records which might need to be completed to reflect/help control issuing resources can include:

- ◉ Requisition sheets/forms
- ◉ Internal transfer sheets
- ◉ Bin cards

(Continued)

Slide 65

Slide No	Trainer Notes
65.	Trainer notes a range of records might need to be completed when physical resources are issued identifying these can include: • Internal requisitions sheets – to support the taking of items from store to tours so administration can track their use for calculating financial performance of tours • Internal transfer sheets – to reflect movement of stock/items from one tour/vehicle to another tour/vehicle (that is, the items has already been taken out of store and allocated to a tour/vehicle) • Bin cards – showing: ▪ Where items removed from stock have been allocated ▪ When they were taken ▪ How many were allocated ▪ Who authorised their removal ▪ Number/amount of remaining stock-on-hand **Classroom Activity – Handouts** Trainer distributes and discusses documents identified on the slide.

Slide

Issue the identified physical resources as identified

- ◉ Database files and fields
- ◉ Checklists
- ◉ Receipts.
- ◉ It's important to remember:
  - • Get a signature for everything you issue
  - • Anyone who signs for resources takes responsibility for them.

Slide 66

Slide No	Trainer Notes
66.	Trainer continues identifying and describing records or documentation which might need to be completed to help with management/control when issuing physical resources: • Database files and fields – showing the actual movement of stock items matched against planned movement as contained in the 'stock management' function of the database for the particular tour type/name in question • Checklists – which might be completed by the person issuing the items and/or the person taking delivery/receipt of them. Checklists are required to: ▪ Prove the listed items were delivered/supplied as listed ▪ Verify the condition of the items – the person receiving the goods would refrain from signing for any sub-standard or deficient items (or they would be appropriately listed on the document as 'Missing' or 'Not Supplied' ▪ Provide a basis for checking off items when the tour returns • Receipts – to verify/prove cash, vouchers and similar (company credit cards, travellers' cheques, company authorisations) were given to Tour Guides/Leaders. **Note** It is important for everyone who signs for resources to understand that once they have signed for the items, they are assuming responsibility for them. In effect, they are taking charge of everything they sign for and they become accountable for goods as soon as they sign for them. It is likewise important for the person who provides the items to obtain these signatures as evidence they have disposed of all the resources correctly/legitimately.

Slide

Distribute physical resources to required locations

What is 'remote supply'?

⊙ Providing resources to a tour at a location other than the point of departure from the organisation.

Slide 67

Slide No	Trainer Notes
67.	Trainer introduces and defines concept of 'remote supply' offering: • Providing resources to a tour at a location other than the point of departure from the organisation is referred to as remote supplying.

Slide

Slide 68

Slide No	Trainer Notes
68.	Trainer identifies remote supply might occur: • At pre-determined times as identified during the planning phase • In response to situations arising/emergencies – in responses to requests/messages from tour groups and the Guides/leaders.

Slide

Slide No	Trainer Notes
69.	Trainer explains remote supply can be required to:
	• Re-supply or replenish the tour stocks – as they are depleted through regular/normal use or because there has been some emergency or problem situation
	• Deliver required resources to the tour group at a pre-arranged location at a pre-arranged time – see Activity below.
	Classroom Activity – Question and Answer session
	Trainer asks class for examples of 'required resources' which might be used/obtained via remote supply.
	Possible answers might include:
	• Camping gear for overnight stays – which might need to be set-up as part of the provisioning process
	• Food and beverages for meals – which might include the need to prepare and serve the meals.
	• Most tours provide their own 'refreshments' (or purchase them from third party providers) where a bus or 4WD is used, but for walking, animal-based tours or cycling tours there can be a need for snacks to also be provided.
	• Fuel and spare parts for vehicles – might also be a need to provide mechanical service to support this
	• Medical supplies – and first aid assistance

	• Gear, activity and safety/PPE equipment – to enable participation in games, events, sports and other interactive inclusions
	• Personal property and items for individual tour group members – where there has been a special request for these items to be provided (and paid for by those who request/order them): things such as food items, clothing, hygiene products and batteries are common.

Slide

Distribute physical resources to required locations

Ways in which tour operators distribute physical resources for tours might include:

⦿ A vehicle of some kind:

- Lorry
- Van
- Catering van/mobile kitchen
- Purpose-built trailer of some/different types

⦿ Using a third party carrier.

Slide 70

Slide No	Trainer Notes
70.	Trainer explains physical resources are distributed in one of the following ways: • Using a vehicle belonging to the tour organisation – most businesses of this nature will retain: ▪ A lorry ▪ A van ▪ A catering van/mobile kitchen ▪ A variety of purpose-built trailers • Using a third party carrier.

Slide

Distribute physical resources to required locations

Other activities tour operators sometimes integrate with remote supplying:

- Transportation of tour staff to and from the tour
- Taking late arrivals to join the tour group
- Bringing back damaged or unwanted items
- Returning paperwork
- Bringing back tour group members who want to leave the tour.

Slide 71

Slide No	Trainer Notes

71.	Trainer highlights when remote supplying items to a tour group the following activities are sometimes integrated into the supply process:
	
	• Transporting new/other tour staff to the group – to swap staff/assist with staff change-overs/shift changes
	• Taking new tour group members to join the tour as a 'late arrival'
	• Bringing back a wide variety of items – such as:
	  ▪ Damaged goods/property
	  ▪ Items no longer required by the tour group
	  ▪ Receipts and internal documentation (progress reports; daily reports), forms and sheets
	• Bringing back tour group members who wish to leave the tour – or those who have been required to leave the tour by tour staff for unacceptable behaviour.

Slide

Slide No	Trainer Notes
72.	Trainer defines third party providers, stating they are Third party providers are external businesses who supply goods and services on a fee-for-service basis.

Slide

Arrange for third party supply of resources

Reasons use third party providers because:

- They can be more effective and/or operationally efficient

- The products/services they provide can be less expensive/more 'cost effective'

- Their use/involvement in the tour can add 'local flavour' to the tour experience for tour group members

(Continued)

Slide 73

Slide No	Trainer Notes
73.	Trainer identifies they are often used by tour companies because: • Using local providers is often more effective and operationally efficient than buying all requirements beforehand, carrying them and using them when needed – in many cases it is just physically impossible for a tour to carry all its own resources as there is just insufficient room or the added weight will cause additional expense or compromise ride safety or quality • Resources bought on tour can often be less expensive than those purchased at the base of operations by the tour business – they might also be of better quality. ▪ This is often the case when it relates to perishable food items. • They give 'local flavour' to the tour and add an extra dimension for tour group participants – for example, when they dine and sleep in local establishments they get to experience the local conditions, culture and hospitality on a first-hand basis.

Slide

Arrange for third party supply of resources

- Their inclusion can add an element of luxury/indulgence to tours which might be otherwise 'hard'

- The providers are the only ones who can supply what is needed

- It can be a requirement that the tour operator deals with local businesses/people under some contract or other arrangement with a local community.

Slide 74

Slide No	Trainer Notes
74.	Trainer continues giving reasons tour operators use third party providers:
	• Use of third party providers can add an element of luxury and indulgence to a tour – to give a break from what might be otherwise Spartan and difficult conditions
	• These providers are the only local options for the provision of items such as:
	▪ Food and beverages
	▪ Activities and rides
	▪ Local transportation
	▪ Local guides
	▪ Local knowledge and advice.
	• There might be a trade-off required by local operators or communities – for example, it might be a condition of entry to a community or area that:
	▪ Money is spent locally to help promote the economy
	▪ Local people are used to provide certain tour-related work to help create jobs and sustainable employment for the local population.

Slide

Arrange for third party supply of resources

Before dealing with third party providers it might be necessary to:

- Compare quality and prices of items
- Negotiate deals
- Develop contracts/tender documentation
- Organise lines of credit so purchases can be made

(Continued)

Slide 75

Slide No	Trainer Notes
75.	Trainer discusses pre-tour arrangements with third party providers stating when organising for the third party supply of resources to tour groups it might be necessary to undertake the following activities: • Compare prices and quality available from a variety of local suppliers – in order to source the best product/s and the best deals • Negotiate deals – in relation to issues such as discounts for cash or prompt payments, quantity discounts, loyalty bonuses • Develop contracts/tender documentation – and posting them inviting local suppliers to tender for the contracts/supply of identified goods and services • Organise lines of credit – so tour groups can make purchases as required and the costs can be charged back to the tour organisation.

Slide

Arrange for third party supply of resources

- Pre-pay for goods and services – in some cases
- Obtain vouchers or other relevant documentation which can be used to redeem items/services
- Organise locations, dates, times, quantities
- Contact providers to confirm or amend previous arrangements.

Slide 76

Slide No	Trainer Notes
76.	Trainer continues giving examples of activities which might be required when organising for the third party supply of resources to tour groups:
	• Pre-pay for known items and quantities – it might be a condition of buying from a local business all items need to be paid for 'in advance' before they will be supplied
	• Obtain vouchers or other documentation in advance – so relevant forms, tickets and coupons can be issued to Tour Leaders and tour group members for them to redeem for the provision of goods and services as required from local businesses/outlets
	• Organise locations, dates and times – to suit the needs of the tour group and the operation of the supplier's business
	• Contact local suppliers immediately prior to tour group departure – to confirm arrangements, verify availability of supply and update any last-minute requirements/changes to previous agreements.
	Classroom Activity – Guest Speaker
	Trainer organises a third part provider and asks them to talk to class about:
	• What they provide to tour operators
	• What they expect/prefer/demand from tour operators
	• How they deal with tour operators
	• Documentation, contracts and arrangements commonly in place.

Slide

Verify supply of resources with tour guide and other personnel

Reasons verification needs to occur:

⊙ Ensure allocated resources were provided as expected

⊙ Determine if more/other resources are required

⊙ Check quality and quantity of what was supplied

⊙ Help keep third part providers honest

(Continued)

Slide 77

Slide No	Trainer Notes
77.	Trainer verification needs to occur for several reasons – to:
	• Ensure the allocated resources have been provided as expected – there is no guarantee the resources loaded for delivery were, in fact, the ones actually provided
	• Determine whether or not more/different resources are required – this can be the case when tour staff decide the actual resources they have been provided with do not match the identified need they have
	• Check the quality and suitability of the items delivered/provided – there can be situations where items have been damaged in transit so there can be a need to undertake repairs or arrange for another remote supply
	• Help keep third party transport providers/carriers of resources honest – the loading sheets signed by those who pick up items from the tour company provide the basis of this verification. Once drivers sign for the items they collect they are responsible for those items until they are signed for when delivered.

Slide

Slide No	Trainer Notes
78.	Trainer continues explaining why verification needs to occur– to:

- Create a valid paper-trail of documentation – tracking resources from purchasing through to issuing and actual supply to the tour.
  - This will be supplemented by 'Goods Returned' documentation for the majority of resources to complete the cycle on return of the tour.
  - These documents are vital for administration/management to:
  - Calculate business performance statistics – in relation to:
    - Stock used
    - Costs
    - Return on investment
  - Form the basis of future tour-related decisions – such as:
    - Need to increase tour prices
    - Need to amend inclusions/activities incorporated as part of the tour
    - Future need for extra and/or different resources
    - Possible need to change suppliers and/or resources used.

Classroom Activity – Guest Speaker

Trainer arranges for an administrator from a Tour Operator to attend and talk to class about:

- Their job and role in relation to dealing with resources for tours
- Their relationship with the person who allocates resources to tours
- What they expect from those who allocate resources to tours
- What they do to analyse the performance of tours
- The systems and procedures used to monitor and control resources used for tours.

Slide

Verify supply of resources with tour guide and other personnel

Special requirements might apply to making sure resources arranged through third party providers were provided:

⊙ Verbal confirmation – with Tour Leader

⊙ Identification of items **not** provided – so alternative arrangements can be initiated

⊙ Collection of supporting documentation – to support processing/enable payment.

Slide 79

Slide No	Trainer Notes
79.	Trainer highlights need to make sure the resources which were arranged through a third party supplier have actually been provided. While immediate notification of failure to supply can be made via radio/phone it is common for the verification process in this regard to: • Verbally confirm resources arranged were provided as ordered • Identify items not provided – so alternatives can be organised and payment withheld (or claims made) for things not supplied • Collect supporting documentation – such as signed dockets/receipts for forwarding to the accounts department for internal processing. **Classroom Activity – Guest Speaker** Trainer organises one or two Tour Leaders or Tour Guides to attend and talk to students about: • Their jobs, roles and responsibilities • What they expect from those who allocate resources to tours • How they interact with those who allocate resources to tours • What they really want those who allocate resources to tours to do to support them in their day-to0day working life.

Slide

Slide No	Trainer Notes
80.	Trainer identifies people commonly involved in verification are: • Tour Leader – for most items but especially in relation to: ▪ Cash ▪ Vouchers/coupons ▪ Travel documentation ▪ Legal papers • Cook/s – for food and beverages and cooking equipment • Tour Guides – for equipment related to activities, tour merchandise, safety clothing and equipment • Drivers – where fuel, spare parts and vehicle-related items need to be provided.

Slide

Slide No	Trainer Notes

81.	Trainer explains verification commonly involves:
	
	• Physically inspecting items
	
	• Counting items
	
	• Comparing items provided against supply documentation – taking into account relevant characteristics of individual things which might relate to:
	  ▪ Brand name
	  ▪ Size/s
	
	• Signing to acknowledge receipt of items received – and dating the re-supply sheet or appropriate internal document (requisition)
	
	• Noting on the accompanying documents items not provided – and/or items rejected because they were damaged or otherwise unsuitable.
	  ▪ Returned/rejected items need to be taken back to the tour organisation for formal processing/disposal and not simply 'thrown out'.

Slide

Slide No	Trainer Notes
82.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 2

- Keep accurate and comprehensive records
- Provide resource which match/reflect identified need for tours/groups
- Determine and adhere to budget limitations which apply
- Actively control stock movement and management

(Continued)

Slide 83

Slide No	Trainer Notes
83.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Summary – Element 2

- Inform colleagues regarding resource availability, use and allocation

- Issue resources only as identified

- Maintain records of resources issued

- Ensure all stock movement is recorded and verified

(Continued)

Slide 84

Slide No	Trainer Notes
84.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
85.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Element 3 – Review resource allocation

Performance Criteria for this Element are:

⊙ Compare resources used with budget and revenue raised

⊙ Review actual conduct of tour and compare with expectations

⊙ Identify resources that need to be revised for subsequent tours

⊙ Revise standard tour-related documentation.

Slide 86

Slide No	Trainer Notes
86.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • Why do you think there is a need to review resource allocations? • Who do you think might be involved in this process, and why? • When might the reviews take place? • What activities would assist in these reviews?

Slide

Slide No	Trainer Notes
87.	Trainer gives a context stating:
	• There can be a need the person who *allocates* the resources to tours to also participate in activities related to *analysing the use* of those resources.
	• In most cases the statistics developed as part of this process will be generated by management/administration but the raw data which forms the basis of those calculations will be supplied by the person who handles the actual resource allocation.
	• In practice this means the person who allocates the resources will probably need to provide:
	▪ Lists of physical resources issued to tours – on a tour-by-tour basis
	▪ Lists of physical resources returned from tours – on a tour-by-tour basis

Slide

Slide No	Trainer Notes

88.	Trainer continues identifying what those who allocate resources might need to provide when participating in analysing resource use:
	• Copies of delivery dockets/invoices – for goods delivered to inventory
	• Requisition sheets – completed by Tour leaders requesting products be supplied for tours
	• Stock-take sheets – to show/demonstrate levels of stock-on-hand
	• Copies of other internal documentation which impacts resource use – such as:
	  ▪ Orders sent to third party providers for the supply of goods/services – catering, entertainment, accommodation
	  ▪ Receipts for money spent by Tour staff while on tour – food, fuel, emergency provisions
	  ▪ Inter-tour transfer sheets – which show resource movement from one tour/tour group to another
	  ▪ Maintenance requests – which will indicate costs associated with upkeep/service of items
	  ▪ 'Assets Register' – showing items which have been disposed of (sold or thrown out) because they were damaged, out-of-date or otherwise no longer suitable/fit for purpose.

Slide

Slide No	Trainer Notes
89.	Trainer presents reasons to undertake these calculations include to:
	• Determine business performance – and the financial performance of individual tours and tour types: in essence, to ensure they are:
	▪ Generating the expected income
	▪ Not making a loss
	▪ Returning the profit they expect
	• Provide a point of reference for comparing efficiency of resource usage between different staff members – to see who uses 'the most' and who uses 'the least'
	• Contrast different tour types against each other – to identify which tours/personnel are the best performers/most cost effective

Slide

Compare resources used with budget and revenue raised

- Enable/provide the basis for a range of associated business and operational decisions

- Enable identification of 'most' and 'least' profitable tours

- Identify and classify future needs so suppliers can be sourced, deals negotiated and items purchased in advance of actual need.

Slide 90

Slide No	Trainer Notes

90.	Trainer continues giving reasons for the calculations to be done – to:
	
	• Decide whether or not:
	    ▪ There is a need to increase tour prices – to cover increased costs and/or to maintain an acceptable ROI
	    ▪ The price of a tour needs to increase – due to increases in resources/costs needed to provide the tour
	    ▪ A tour type needs to be removed from the tour options being advertised/provided – because it is not profitable enough
	
	• Enable identification of 'most' and 'least' profitable tours – so the most profitable ones can be more actively promoted/pushed
	
	• Try to identify future need – for money to buy future resources: this might indicate a need to manage cash flow or take other action (such as borrow funds) to enable required resources to be acquired
	
	• Classify and quantify future physical resources required – so:
	    ▪ Suitable suppliers can be sourced
	    ▪ Best deals and prices can be negotiated
	    ▪ Items can be purchased and received before they are needed so items are available and ready for use when required.

Slide

Review actual conduct of tour and compare with expectations

This comparison is **NOT** related to financial or statistical performance of the tours but relates to analysis of a combination of anticipated outcomes as judged by:

⊙ Customers, tour group members and people who bought tickets

⊙ Management and administration

⊙ Tour staff and Tour Leaders.

Slide 91

Slide No	Trainer Notes
91.	Trainer explains in this context 'expectations' or 'performance' is **not** related to financial or statistical performance of a tour and 'expectations' refers to a combination of anticipated outcomes from the tour as judged by: • Customers, tour group members and those who bought tickets for the tour – looking at factors such as: ▪ What they were told they would receive from the tour (as described by promotional materials, advertisements and members of the staff of the tour company) compared to what they actually experienced ▪ What they experienced last time they took this tour – compared to what they encountered this time ▪ What they expected from the tour – based on other tours they have taken as provided by other tour operators • Management and/or administration of the business – in terms of: ▪ The items they anticipated would be required in order to conduct the tour – compared to what (with the benefit of hindsight) was actually needed/had to be used or provided ▪ The extent to which the business was able to source/supply required resources from the existing inventory of stock – as distinct to having to purchase items specifically to enable/support the tour. – This can be a significant consideration where companies are trying to use 'old' stock/items

- The extent to which resources could be multi-tasked – and used across a variety of different tours/tour types

- Tour staff and Tour Leaders – in relation to topics such as:

  - Sufficiency of items provided – in order to meet actual need/demand while on tour

  - Suitability of resources provided – to allow activities etc. identified in advertisement and/or listed on the itinerary to be conducted/provided properly and safely.

Classroom Activity – Guest Speaker

Trainer organises manager/owner of a tour business and asks them to visit and talk to class about:

- Running a tour business

- Jobs available

- Advice to help students get into the industry

- How they operate their tours

- Resources they use and how they control their use

- Statistical and other analyses they undertake for the tours they operate.

Slide

Review actual conduct of tour and compare with expectations

These reviews are usually part of ongoing standard reviews and are undertaken to:

- Determine alignment between expectations and actual experience

- Decide where/if changes need to be made to advertising and/or tours and inclusions

- Identify whether or not any unique selling points have emerged

(Continued)

Slide 92

Slide No	Trainer Notes

92.	Trainer states this style of review is often part of a standard review program undertaken across the entire organisation on a regular and ongoing basis and these reviews are undertaken in order to:
	
	• Determine level/degree of alignment between expectations and actual experience – for the above three groups
	
	• Decide where and/or if changes need to be made to:
	  ▪ Advertisements and/or promotions
	  ▪ Tour inclusions and activities – and/or items to support them
	
	• Identify if an unexpected/unique selling point has emerged – as, for example, in a situation where:
	  ▪ An alternate use for a resource is identified which can create a new opportunity for a tour or activity
	  ▪ A tour group member has made a positive comment about a tour/resources used which can be used in future promotions of the tour in the form of a quotation 'from a satisfied tour group member' or as an endorsement.

Slide

Review actual conduct of tour and compare with expectations

- Evaluate procedures used to design and develop tours
- Validate other data generated by the organisation – such as:
  - Market research data
  - Customer feedback
  - Internal reports.

Slide 93

Slide No	Trainer Notes
93.	Trainer continues talking about why this sort of comparison is done:
	• Evaluate the procedures used to design and develop tours – as this process will always include consideration of resources required to enable the tour to be conducted
	• Validate other data – such as:
	▪ Results of market research findings
	▪ Feedback received from tour group members
	▪ Comments made by employees
	▪ Contents of internal documentation and reports.
	Classroom Activity – Guest Speaker
	Trainer organises tour worker to attend and discuss with students:
	• How they participate in evaluating tours
	• What information they provide
	• When these activities occur
	• What decisions follow from the research/analysis that is done.

Slide

Review actual conduct of tour and compare with expectations

This type of review/comparison will include:

- Soliciting feedback from tour group members
- Participating first-hand in tours
- Requiring Tour Guides to contribute
- Analysing incident reports
- Reflecting on expectations
- Drawing on industry experiences and related knowledge.

Slide 94

Slide No	Trainer Notes
94.	Trainer explains this type of review and comparison will include: • Soliciting feedback from tour group members – while they are on-tour and on completion of their tour • Participating first-hand in a tour – taking a tour and seeing it through the eyes/experience of a tour group member • Requiring tour staff to provide structured input – every time they complete a tour, such as by providing a formal verbal or written report • Analysing incident reports – relating to events (accidents, injury, near misses) when on tour • Reflecting on expectations – rather than being able to compare and analyse statistics this style of review will entail thoughtful consideration of what happened • Drawing on other industry experiences and related knowledge – about similar tours, alternate choices, previous outcomes and results.

Slide

Slide No	Trainer Notes

95.	Trainer informs the class the process of identifying and acquiring resources which need to be revised will need to reflect and accommodate the following procedures – it:
	
	• Must flow from a structured review process – there must be an identified and actual need to revise the resources.
	
	   ▪ In many cases there will be a need to present a valid rationale for the purchase/acquisition of new, different or additional resources.
	
	• Has to occur within designated budget parameters – there are always limits regarding the amount of money which can be spent and these constraints will be imposed by management/administration
	
	• Commonly requires specific authorisation – in most cases there needs to be specific permission verbally given to go ahead and make necessary purchases, or there will be a need to gain a signed 'authority' to proceed (such as a Purchase Order)
	
	• Can require multiple quotations to be obtained for comparison purposes – before an order is placed.
	
	   ▪ Many organisations require this where the value of resources to be purchased is above a designated value.

Slide

Slide No	Trainer Notes
96.	Trainer continues talking about the identification and acquisition process stating it:
	• Might require trialling of resources prior to purchase – this might entail a variety of activities which will vary depending on the nature of the resources but might include:
	▪ Testing items for the purpose they are intended – to determine performance and applicability
	▪ Viewing use of the resources in operation at other businesses and/or on other tours – to verify their suitability
	• Generally requires that only a limited/maximum number (or value) of stock is acquired at any one time – in order to control the value of inventory so excess cash is not tied up in stock/resources
	• Might require purchases that are:
	▪ Made from designated suppliers only – known as 'preferred providers'
	▪ Bought before or after a certain date – to accommodate internal cash flow constraints
	▪ Lodged using a given purchasing protocol – such as online, using a sales representative, in-person, by telephone, via contract/tender process.
	In practice all resource types (physical, financial, human, information – or combination of same) might need to be changed.

Slide

Identify resources that need to be revised for subsequent tours

Revision of resources must reflect identified need and could require:

- Buying more of the same resources
- Buying different brands of the same resources

(Continued)

Slide 97

Slide No	Trainer Notes
97.	Trainer notes the actual revision of resources must reflect the identified need to make alterations to what was previously allocated stating in practice this could require: • Buying more of the same resources – to: - Meet identified increased demand - Replace items which have been stolen, damaged, discarded, lost or used • Buying different brands/types of the same sort of resources – in effect this is the same as substituting items which might occur in order to: - Meet identified preferences for different brands/makes/models by tour group members - Reflect better deals the organisation has been able to negotiate with suppliers - Acquire a more efficient or effective resource option compared to what was previously being used.

Slide

Identify resources that need to be revised for subsequent tours

- Upgrading existing resources:
  - Purchasing the same items but getting new ones
  - Purchasing new versions of existing/previous items
  - Purchasing items required by legislation/authorities
- Buying items never used before – to:
  - Support new tours
  - Meet requests made by past customers
  - Address upcoming identified need.

Slide 98

Slide No	Trainer Notes

98.	Trainer continues identifying what might be required in this regard:
	
	 • Upgrading existing resources – which might mean:
	
	  ▪ Purchasing the same items but getting new ones – to enhance their appearance thereby maintaining the image of the business
	
	  ▪ Purchasing new versions/more recent models of existing/previous items – to give tour group members confidence in the quality of the resources being used/provided for tours
	
	  ▪ Purchasing specified items as required by legislation/authorities – to meet legally-imposed safety and other compliance regulations
	
	 • Buying new items never used before – so as to:
	
	  ▪ Support new tours, activities and inclusions planned for tours conducted by the company
	
	  ▪ Meet requests made by past customers about resources which would have increased their satisfaction level with tours they took
	
	  ▪ Address upcoming identified need for special tours which have been requested/agreed to – these are 'special event' (or 'one-off') tours with specific and unique needs.

Slide

Identify resources that need to be revised for subsequent tours

For large value items, business might elect NOT to purchase.

They might instead:

⦿ Rent

⦿ Lease.

Slide 99

Slide No	Trainer Notes
99.	Trainer identifies for acquisition of large value resources (such as vehicles, plane and machinery) the business might elect not to purchase items outright but might choose to use an alternate acquisition method such as: • Renting • Leasing.

Slide

Revise standard tour-related documentation

When changes have been made to tour resources there can be a need to amend:

⊙ Advertising materials:

- Brochures and flyers
- Media advertisements
- Static signage and posters
- Websites

(Continued)

Slide 100

Slide No	Trainer Notes
100.	Trainer explains there can be a need to change the following documents when changes to tour resources have been made:
	• Advertising material aimed at the general public/customers – such as:
	▪ Brochures and flyers
	▪ Media advertisements
	▪ Static signage/posters
	▪ Websites
	▪ These documents will need to change to reflect any substantial changes which materially alter the type or nature of the trip being advertised.
	– These documents are not changed where minor/insignificant alterations occur because the expense involved in generating new advertisements/advertising materials is generally prohibitive – the key is promotional material must remain 'truthful' and never be deliberately 'misleading'.

Slide

Revise standard tour-related documentation

- Internal information documentation provided to employees, sales staff and joint venture partners

- Tour itineraries

- Tour schedules

- Booking details

- Tour checklists

(Continued)

Slide 101

Slide No	Trainer Notes
101.	Trainer continues identifying documents which might need to be changed if tour resources are changed:
	• Internal information documentation provided to:
	▪ Employees/sales staff – to assist them provide information to customers
	▪ Joint venture partners and/or other agencies – to advise them of changes so they are aware of what is happening.
	– Internal employees need to know about the changes so they can accurately and professionally communicate these new arrangements to others/potential customers
	• Tour itineraries – altering (as appropriate on the basis of the review): see Classroom Activity below
	• Tour schedules – the sheets which list: see Classroom Activity below
	• Booking details
	• Tour checklists – the sheets/forms used to list and quantify resources allocated to standard tours to ensure all required items are supplied.
	▪ These might need to be changed in terms of:
	– Adding or removing stock items
	– Changing type of items (but leaving quantity the same).

Classroom Discussion – Question and Answer session

Trainer asks class what details might need to be changed for the following:

Tour itineraries

Answers might include:

- Departure times and date; Travel methods/type/carrier; Travel times; Durations; Arrival times at destinations and events; Departure times from destinations and events; Points of interest; Accommodation details; Catering details; Inclusions.

Tour schedules

Answers might include:

- Types of tours; Days they run; Times; Prices; Inclusions.

Slide

Revise standard tour-related documentation

- ⊙ Tour resource stock sheets
- ⊙ Duty allocations and rosters
- ⊙ Plans including emergency responses.

Slide 102

Slide No	Trainer Notes
102.	Trainer continues identifying documents which might need to be changed if tour resources are changed: • Tour resource stock sheets – such as ▪ Inventory sheets ▪ Bin cards ▪ Stock-take sheets: Changes might need to address: – Adding or removing stock items from the list of stock-on-hand – Changing type of items kept in stock • Duty allocations and rosters – in some cases there can be a need to update staffing-related documents where new resources require: ▪ Additional/different roles and responsibilities for staff ▪ More time to undertake traditional tasks as a result of using new/different resources ▪ Additional training of staff to gain competency in the use of the resources ▪ Licensing requirements as imposed by certain agencies/authorities • Plans including emergency responses – to reflect the role/use of the new or revised resources.

Slide

Summary – Element 3

When reviewing resource allocation:

- Use a combination of information
- Use facts, figures and records as one source of information
- Supplement statistics with feedback from tour group members and staff
- Base decisions for change on verifiable evidence

(Continued)

Slide 103

Slide No	Trainer Notes
103.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Trainer Guide
Allocate tour resources

Slide

Slide No	Trainer Notes
104.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
105.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.
	Trainer thanks trainees for their attention and encourages them to apply course content as required in their workplace activities.

Recommended training equipment

Sample documentation – such as:

- Tour itineraries
- End-of-tour reports
- Incident reports
- Tour reports
- Daily tour reports/summaries
- Internal tour-related checklists
- Loading sheets – for tour vehicles
- Safety reports/near miss reports
- Customer comment/feedback forms
- Tour-related budgets and financial documentation relating to resource allocation for tours
- Emergency Management Plans including SOPs inherent in these
- Inter-tour transfer sheets
- Stock-take sheets
- Assets Register
- Receipts for money spent
- Delivery dockets and invoices for goods received
- Maintenance requests.

Examples of advertising and promotional materials for tours as provided by tour operators to tour groups members/potential customers

Sample SOPs for tour operators

Sample vouchers, coupons and tickets

Examples of Exclusion Clauses used by tour operators in their advertising materials/Terms and Conditions

Contracts between Tour Operators and tour groups

Contracts between Tour Operators and destinations/attractions

Sample statistical analysis documentation showing financial performance of tours

Instructions for Trainers for using PowerPoint – Presenter View

Connect your laptop or computer to your projector equipment as per manufacturers' instructions.

In PowerPoint, on the **Slide Show** menu, click **Set up Show**.

Under Multiple monitors, select the Show Presenter View check box.

In the **Display slide show** on list, click the monitor you want the slide show presentation to appear on.

Source: http://office.microsoft.com

Note:

In Presenter View:

You see your notes and have full control of the presentation

Your trainees only see the slide projected on to the screen

More Information

You can obtain more information on how to use PowerPoint from the Microsoft Online Help Centre, available at:
http://office.microsoft.com/training/training.aspx?AssetID=RC011298761033

Note Regarding Currency of URLs

Please note that where references have been made to URLs in these training resources trainers will need to verify that the resource or document referred to is still current on the internet. Trainers should endeavour, where possible, to source similar alternative examples of material where it is found that either the website or the document in question is no longer available online.

Appendix – ASEAN acronyms

AADCP	ASEAN – Australia Development Cooperation Program
ACCSTP	ASEAN Common Competency Standards for Tourism Professionals
AEC	ASEAN Economic Community
AMS	ASEAN Member States
ASEAN	Association of Southeast Asian Nations
ASEC	ASEAN Secretariat
ATM	ASEAN Tourism Ministers
ATPMC	ASEAN Tourism Professionals Monitoring Committee
ATPRS	ASEAN Tourism Professional Registration System
ATFTMD	ASEAN Task Force on Tourism Manpower Development
CATC	Common ASEAN Tourism Curriculum
MRA	Mutual Recognition Arrangement
MTCO	Mekong Tourism Coordinating office
NTO	National Tourism Organisation
NTPB	National Tourism Professional Board
RQFSRS	Regional Qualifications Framework and Skills Recognition System
TPCB	Tourism Professional Certification Board

Trainer Guide
Allocate tour resources