Conduct pre-departure checks

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

Trainer Guide





Australian Aid
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William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Specialist centre
for foods, tourism
& hospitality

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

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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:

<u>Competency Based Training (CBT)</u>

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: CONDUCT PRE-DEPARTURE CHECKS	**NOMINAL HOURS: 50**
UNIT NUMBER: D2.TTG.CL3.04 D2.TTO.CL4.04	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to identify, prepare, check and load equipment and supplies necessary for a tour prior to departure.	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Identify tour requirements **1.1** *Identify itinerary* for the tour **1.2** *Identify group numbers* on the tour **1.3** Identify *supplies that can be obtained on tour* **1.4** *Identify special needs* for the tour **1.5** *Identify budget* for *equipment and supplies* for the tour **1.6** *Determine final requirements* for the tour **Element 2: Prepare identified tour requirements** **2.1** *Obtain identified equipment and supplies* **2.2** *Check condition of equipment and supplies* **2.3** Confirm quantity of equipment and supplies	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that identify, prepare, check and load equipment and supplies, necessary for a tour prior to departure, within the labour divisions of the hotel and travel industries and may include: 1. Tour Operation *Identify itinerary* will include: • Specifying locations to be visited including sites, areas/regions, towns and venues/attractions • Establishing nature and purpose of the tour • Identifying duration including departure and arrival dates, days and nights away and specific timing considerations • Listing potential support services and suppliers involved including those who will share in providing equipment and supplies for the tour and/or nominated aspects of it.

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

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

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

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

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

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

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

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

	Resource Implications Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Note: a representative but not exhaustive range of equipment and supplies must be available to support demonstration of competency. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • Simulated exercises including physical inspection of vehicles that have been loaded • Portfolio of on-tour documentation relating to equipment and supplies, internal stock management/control documentation and external authorisations • Role plays • Oral and written questions • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

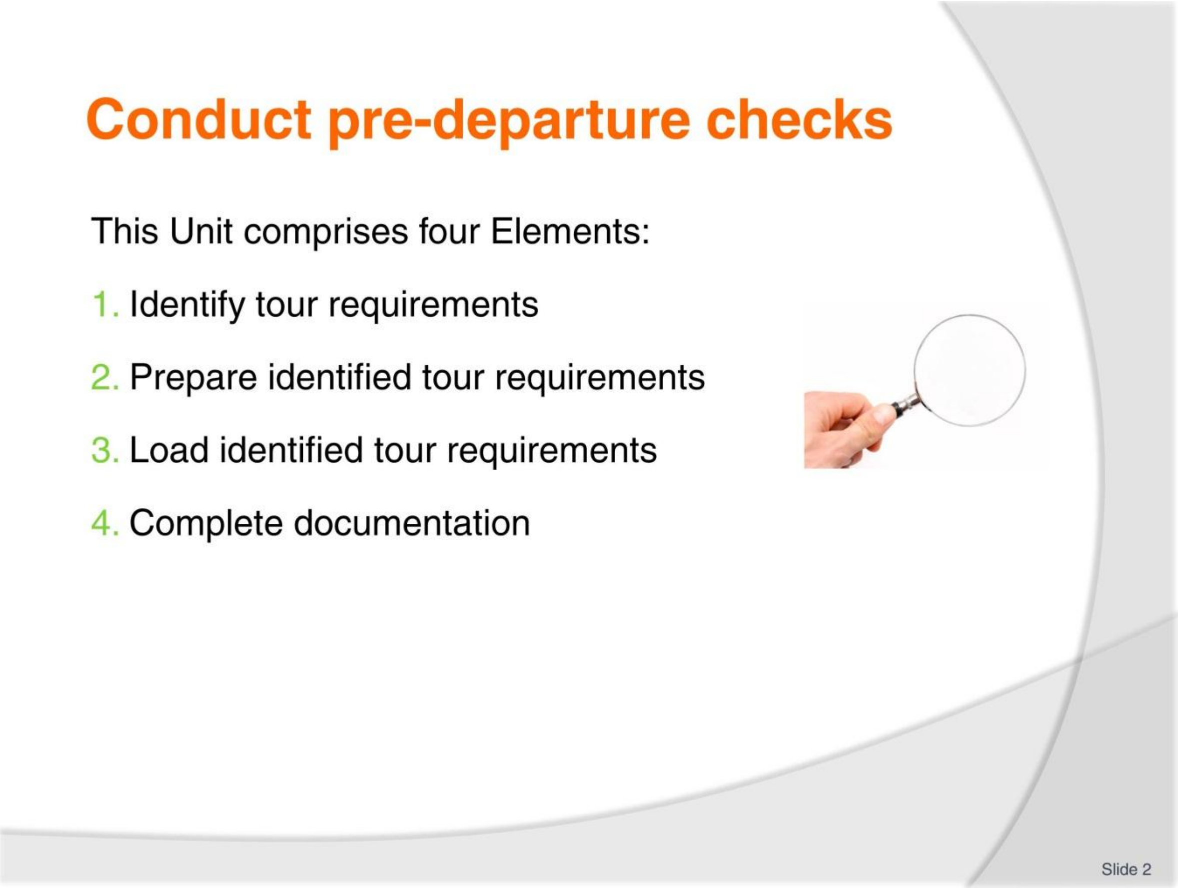
Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Interpret tour-related documents to determine equipment and supply requirements for a tour
Communicating ideas and information	1	Discuss tour needs with tour guides and tour leaders
Planning and organising activities	1	Determine the loading sheets for vehicles

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

Notes and PowerPoint slides

Slide

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

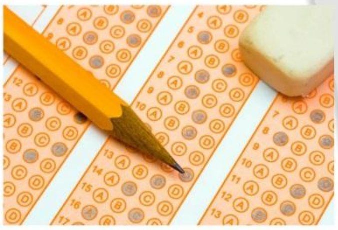
Slide


Slide No	Trainer Notes
2.	Trainer advises trainees this Unit comprises four Elements, as listed on the slide explaining: • Each Element comprises a number of Performance Criteria which will be identified throughout the class and explained in detail • Trainees can obtain more detail from their Trainee Manual • At times the course presents advice and information about various protocols but where their workplace requirements differ to what is presented, the workplace practices and standards, as well as policies and procedures must be observed.

Slide

Assessment

Assessment for this unit may include:

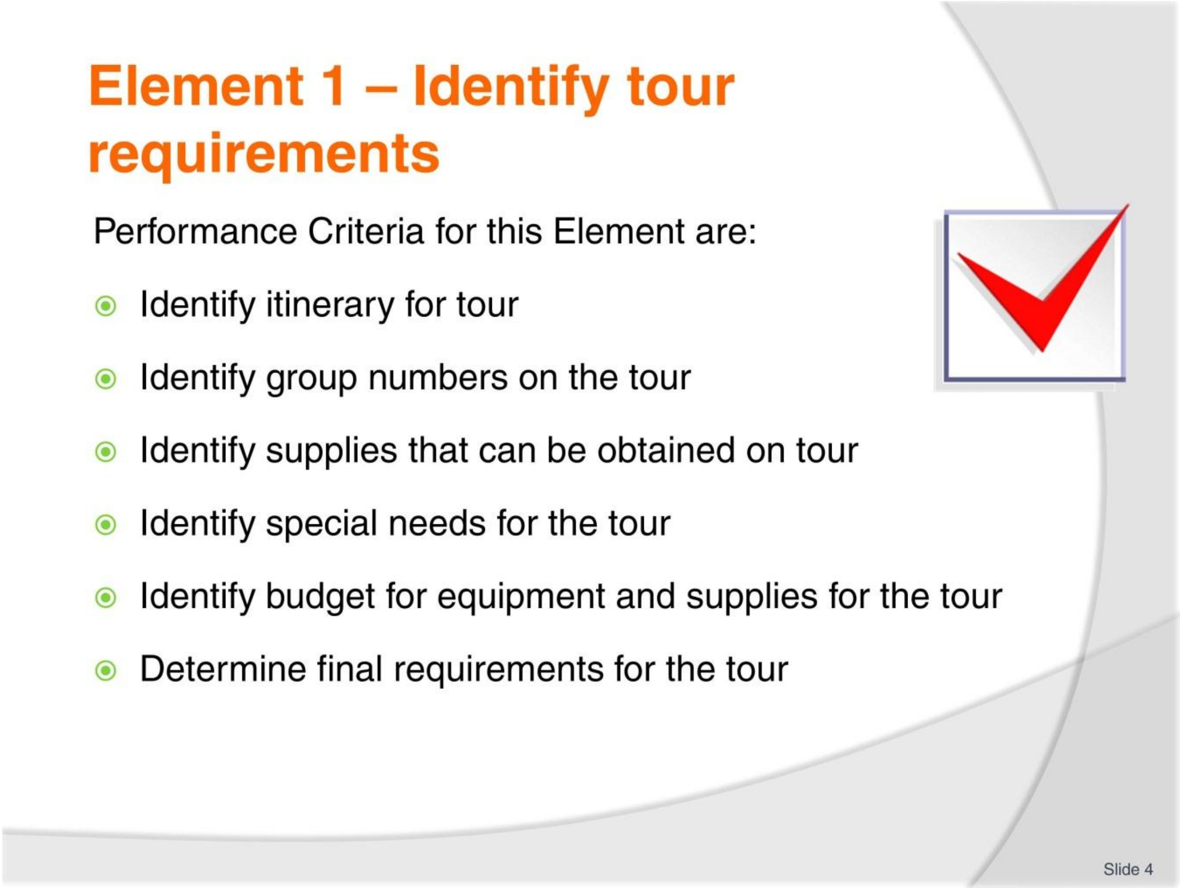


- Oral questions
- Written questions
- Work projects
- Workplace observation of practical skills
- Practical exercises
- Formal report from employer/supervisor

Slide 3

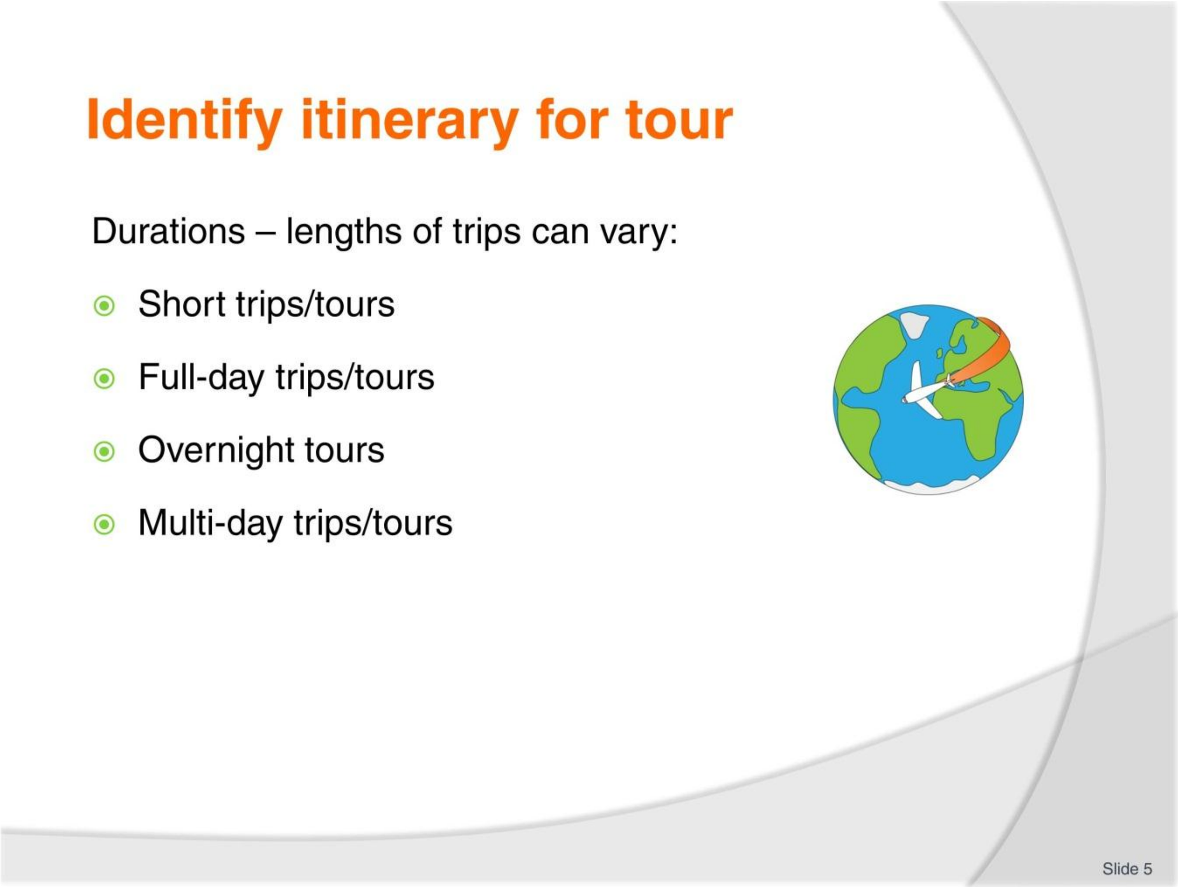
Slide No	Trainer Notes
3.	Trainer advises trainees that assessment for this Unit may take several forms, all of which are aimed at verifying they have achieved competency for the Unit as required. Trainer indicates to trainees the methods of assessment that will be applied to them for this Unit.

Slide



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? • Why is there a need to conduct pre-departure checks? • Who might do these checks? • What do you think is involved in undertaking these checks? • Why are these checks important?

Slide



Slide No	Trainer Notes

5.	Trainer provides a content for the unit with reference to the following points:
	Durations
	Duration of tours/trips may be:
	• Short tours – the duration of these will differ between providers and can vary from half-an-hour to half-a-day.
	  ▪ These are sometimes referred to as 'Excursions'
	• Full-day tours – where the tour departs and returns same day and the tour duration is around 8 – 10 hours.
	  ▪ These are also known as 'Day Trips'
	• Overnight tours – where the tour departs one day and returns the nest
	• Multi-day tours – where the tour party has more than one night away
	  ▪ Common lengths are between 2-days to 14-days
	  ▪ These are also known as 'Extended' tours.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>6.</td><td>
Trainer continues providing context for the unit with reference to:
Classifications
Tours/trips may be:

General tours – these are the normal/standard tours advertised by the operator and available to general members of the public
Private tours – standard tours conducted for a private group of people such as a club, organisation or other cohort of prescribed people
Custom tours – tours which are tailored/customised to suit the specific needs of a client with certain/stated needs or requirements
Shore excursions – tours taken by those on a cruise while they are in port.
Also known as ‘Port of Call’ tours.

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Slide

Identify itinerary for tour

Trip/tour purpose may be for:

- Sightseeing
- Education
- An activity of some sort
- A theme of some kind

Slide 7

Slide No	Trainer Notes
7.	Trainer continues providing context for the unit with reference to:

Purpose

The tour/trip purpose/focus may be:

- Sightseeing
- Educational
- Activity-focussed – such as walking, biking, white water rafting, any sports-related activity
- Themed – such as:
  - Food, wine and nightlife
  - Cultural
  - Historic and heritage
  - Shows and concerts
  - Sporting events.

Classroom Activity – Internet Research

Trainer supervises internet research on relevant websites for items identified above, such as:

‘Kinds of tour/types of tourism’ at http://www.slideshare.net/lykmrsnmndz/kinds-of-tour

Slide

Identify itinerary for tour

Transport for trips/tours may involve:

- Water
- Air
- Vehicle
- Animals

Slide 8

Slide No	Trainer Notes
8.	Trainer continues providing context for the unit with reference to: **Transportation** Transportation for these tours/trips can be provided by any one of a multitude of options which can include but is not limited to: • Water – cruising, sailing, rafting • Air – aeroplane, ballooning, helicopter • Vehicle – coaches, 4WDs • Animals – horses, camels, elephants.

Slide

Slide No	Trainer Notes
9.	Trainer continues providing context for the unit with reference to: **Destination/s** The trip/tour may be: • Local – staying in the area relatively close to where the tour departs • In-country – where the tour covers destinations within the country • International – where the tour/trip visits other countries.

Slide

Identify itinerary for tour

Pre-departure checks are conducted to:

- Ensure smooth operation of trip/tour
- Meet customer expectations
- Discharge legal obligations
- Make sure all required items are loaded
- Support tour staff

Slide 10

Slide No	Trainer Notes
10.	Trainer explains pre-departure checks are conducted to: • Ensure the tour runs smoothly • Meet customer expectations • Discharge Duty of Care and other legal obligations • Make sure all necessary items are loaded for the tour • Support tour guides and other tour staff. **Classroom Activity – Guest Speaker** Trainer arranges for person with experience in conducting pre-departure checks for trips/tours (as described by the Competency Standard) and asks them to: • Discuss their job • Explain what they do • Give tips and advice on the role • Identify responsibilities associated with the work • Explain communication and relationships with other staff in the organisation to enable job to be properly completed • Identify and supply examples of documents used.

Slide

Slide No	Trainer Notes
11.	Trainer introduces 'itinerary' explaining it is the plan for a trip or tour and an itinerary is commonly provided for every tour/trip (and all travel) sold and provided to the client/tour group member and may list: • Name and contact details of the organisation which has organised/sold the trip, tour or travel • Name of client • Dates and times – of travel (arrivals and departures) as well as trip time • Destinations, areas/regions, towns and venues/attractions to be visited • Activities and inclusions • Modes of travel • Transportation details – such as type of vehicle used, name of vessel, flight number • Accommodation arrangements – name of facility (hotel room or camping), dates • Terms and conditions – for carriers, accommodation and other service providers • Specific requirements relating to the travel/destinations – such as: ▪ Visa requirements ▪ Health issues

	▪ Time to arrive prior to departure ▪ Customs and immigration requirements. **Classroom Activity – Handouts** Trainer distributes and discusses sample itineraries.

Slide

Slide No	Trainer Notes
12.	Trainer advises ways to obtain the itinerary are: • Speak to management – who will advise what is happening/required • Refer to standard trip details – where the trip is a normal tour • Look at the client file – where the tour is customised or is a private trip • Talk to other staff – this involves speaking with employees who have worked on/with previous similar trips/tours. **Classroom Activity – Internet Research** Trainer supervises internet research on relevant websites for items identified above, such as: • http://bodymindspiritjourneys.com/thailand-tour-sample-itinerary.html • http://www.audleytravel.com/destinations/southeast-asia/cambodia/itinerary-ideas.aspx • http://www.gobaguio.com/itinerary.html#.VAO39aOaKho • https://www.nrao.edu/greenbank/motorCoachMailer.pdf

Slide

Identify itinerary for tour

Need to obtain hard copy itinerary:

- To identify tour details
- To establish the purpose of the trip/tour
- To identify tour duration
- To identify support services and suppliers involved

Slide 13

Slide No	Trainer Notes
13.	Trainer observes there is a need to obtain a **hard copy** to serve as a basis for: • Identifying the itinerary – that is, being able to identify the details of the trip/tour (as identified above) which gives a **general feel** for and understanding of what will be necessary for the trip/tour • Establishing **specific nature** and purpose of the tour – these will/can vary between tours depending on: ▪ Client/tour group party and their individual or special requests/needs ▪ Title/name of the trip/tour • Identifying duration of the trip/tour – this is a key and relates to: ▪ Departure and arrival dates – these are the dates the tour leaves the office/agency, and arrives either at destinations or back at the office/agency ▪ Days and nights away – nights away is always one less than days away ▪ Any specific timing considerations – such as the non-negotiable need for the tour group to be at a location at a specified time. These considerations are important to ensure the tour integrates with other activities or events, such as the need for the tour party to: – Be at a sporting pavilion in time for the game to start; Be present at feeding time for the animals; Be seated for meals at a hotel/external provider; Arrive at an accommodation venue

	• Identifying potential support services and suppliers involved in the trip/tour – including other business/organisations (third party providers) who will share in providing a range of goods and services, such as: ▪ Meals – food and beverages; Ancillary transport and activities; Accommodation; Equipment and supplies.

Slide

Identify group numbers on the tour

People on trips/tours may be called:

- Customers
- Clients
- Guests
- Pax
- Tour group members/Tour members
- Tour party

Slide 14

Slide No	Trainer Notes
14.	Trainer explains people on tours may be referred to by a range of names and operators have their own preferences with options including: • Customers • Clients • Guests • Pax • Tour group members • Tour party.

Slide

Identify group numbers on the tour

Numbers on a trip/tour can be identified by:

- Counting tickets/places sold
- Checking client file
- Speaking with management
- Talking to tour and counter/sales staff

Slide 15

Slide No	Trainer Notes
15.	Trainer instructs tour group numbers can be identified by: • Counting tickets/places sold – this is the most common method for all tours. This is commonly done by: ▪ Counting ticket stubs ▪ Counting duplicate tickets ▪ Referring to a database ▪ Talking to sales staff • Checking the client file – for private and custom tours • Speaking with management – to get input they may have received from clients and/or joint venture operators • Talking to Tour and counter staff – who may provide information to assist in relation to: ▪ Numbers normally experienced on similar tours ▪ Personal knowledge regarding the individual up-coming trip based on feedback from participants and/or comments which they have overheard.

Slide

Identify group numbers on the tour

Need to identify tour members – to:

- Identify tour numbers
- Identify those who will join and/or depart tour *en route*
- Determine type and nature of group/tour
- Determine general nature of requirements/resources
- Get a feel for usage of resources by tour members

Some operators provide standard resources regardless of numbers booked ('par stock').

Slide 16

Slide No	Trainer Notes
16.	Trainer states identifying tour group members must be done to determine:

- The number of tour members/participants – in total.
- Those who will depart and/or join the tour along the way – in terms of:
  - Their names
  - Destinations/locations where they will join or leave the tour
    - The above two factors have obvious implications for **the quantities of resources** which need to be provided/arranged
- Classification and quantification of nominated group on the trip – such as:
  - Men and women
  - Adults, children and babies/infants
  - Age groups
    - Requirements in this regard will depend on the individual trip/tour trip – sometimes these details are necessary/important and sometimes they are not
- Potential usage of participants – this needs to be assessed for each activity, at each location and for every service and/or product advertised
  - Information gained from previous tours coupled with personal experience and common sense form the basis for this

	▪ The above two factors have obvious implications for **the nature of resources** which need to be provided/arranged • In combination, then, identifying group tour numbers and profiles is the basis for determining the resources and requirements which need to be loaded and/or otherwise arranged for the tour/trip. **Point to note** Some operators, for some tours, will require a standard loading of resources for a tour **regardless of numbers booked**. This is called 'par stock' for the tour.

Slide

Slide No	Trainer Notes
17.	Trainer notes depending on the tour type there can also be a need to obtain additional documentation relating to the tour explaining documentation may be required to: • Provide to tourist guides • Load onto the tour vehicle • Forward to third party providers • Form the basis of internal protocols (for administration and financial performance purposes) associated with preparing, checking and loading vehicles prior to a tour.

Slide

Identify group numbers on the tour

Other/extra documents may include:

- Passenger lists
- Manifests
- Seating lists
- Rooming lists
- Technical/operations itinerary

(Continued)

Slide 18

Slide No	Trainer Notes

18.	Trainer identifies other documentation required can include:
	• Passenger lists – this can be:
	  ▪ List of numbers on the tour with no further details. List does not distinguish by age, gender or other characteristic
	• Manifests – these are detailed versions of 'Passenger List' containing information such as:
	  ▪ Names; Age; Date of Birth; Passport number/details
	• Seating lists – identifying seating arrangements (especially priority or preferential seats [window seats; front of bus; aisle] which have been requested/paid for) by name
	• Rooming lists – this is a list of tour group members by name showing the room number they are staying/roomed in at accommodations venues used by the tour
	  ▪ Rooms may be shared or single
	• Passenger profile sheets – these are not common/regular documents but can be prepared where individual groups or tour group members have special needs or have made special requests
	• Technical or operations itinerary – this is an itinerary released only to and used only by tour staff
	  ▪ It reflects and enables the itinerary provided to tour group members but lists details necessary for staff to keep the tour on-time and conduct activities when scheduled.

	Classroom Activity – Handouts Trainer distributes and discusses examples of documents as identified on slide.

Slide

Identify group numbers on the tour

- Catering information
- Supply lists
- Checklists
- Fault reports
- Weather reports
- Road reports

Slide 19

Slide No	Trainer Notes

19.	Trainer continues additional documents which may be required/used:
	• Catering information – used where tour requires catering. It can apply to:
	  ▪ Tour-provided catering – where the tour supplies (for example):
	    – Refreshments – such as tea, coffee, water and biscuits
	    – Basic food – such as pre-packed meals or on-site cooking
	  ▪ Third party provisions – in terms of:
	    – Snacks; Meals; Drinks; Take-away food
	• Itemised lists of required supplies and equipment – known as ‘Supply Lists’ these can form the basis of Loading sheets and help standardise provision of items for tours and guarantee all required items are provided
	• Checklists – which are used by some operators to:
	  ▪ Guide inspections and checks to be undertaken at various stages and for nominated topics before a trip/tour departs
	  ▪ Provide proof required protocols have been followed to ensure pre-departure checks and activities have been completed as required
	• Basic fault reports – these are warnings/advice relating to identified items notifying there are certain faults with equipment which operators/tour staff need to be aware of but which do not mean the items are unsafe or cannot be used

	• Weather reports – depending on the duration for the tour (or the season of the year).there may be a need to include a current weather forecast/report • Road report – in some cases it is standard practice to access a nominated website which lists local road closures and/or road issues which tour leaders/drivers need to be aware of. **Classroom Activity – Handouts** Trainer distributes and discusses examples of documents as identified on slide.

Slide

Slide No	Trainer Notes
20.	Trainer explains third party providers 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 may 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 • Use of third party providers can add an element of luxury and indulgence to a tour – to give a break from what may 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 may be a trade-off required by local operators or communities – for example, it may 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

Slide No	Trainer Notes
21.	Trainer identifies some operators may undertake a cost-benefit analysis in relation to using third party providers. This analysis: • Identifies items (products and services) available at different points along the tour • Assesses their price and quality • Evaluates suitability and integration of items into the tour • Determines the decision to take supplies, or buy them *en route.* While a cost-benefit analysis may be sound business practice in order to identify where items should be purchased this is not always possible as other factors (see above) often have to be factored in.

Slide

Identify supplies that can be obtained on tour

Ways to identify possible third party providers in an area:

- Speak to tour staff
- Read the details of any arrangements entered into with local communities
- Conduct internet searches
- Use region-specific telephone books
- Talk to competitors
- Visit/go to the area

Slide 22

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>22.</td><td>
Trainer presents usual techniques to identify third party providers in an area:

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

Visit potential providers and get to know them and what they provide and what they may be able to do for the trips/tours
View their facilities
Taste or test their products and services – to get a first-hand idea of their quality and relevant other factors.

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	Classroom Activity – Exercise Trainer provides students with relevant telephone books and internet access and asks them to identify potential suppliers for identified tour requirements from a given destination/location.

Slide

Identify supplies that can be obtained on tour

Pre-tour arrangements for third party providers may include:

- Comparing price and quality
- Negotiating deals
- Developing supporting documentation
- Organising credit

(Continued)

Slide 23

Slide No	Trainer Notes
23.	Trainer advises when organising for the third party supply of resources to tour groups it may 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, in the most appropriate locations at the time and on the days required • 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

Identify supplies that can be obtained on tour

- Pre-paying for items
- Obtaining vouchers/other documents in advance
- Organising logistics
- Notifying external providers prior to tour group departure

Slide 24

Slide No	Trainer Notes
24.	Trainer continues discussing pre-tour arrangements in relation to the use of third party providers: • Pre-pay for known items and quantities – it may 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 third party 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 arranges for management/owner of tour operator business to attend and: • Explain how they determine need for external providers to support trips and tours • Discuss their use of third party providers identifying who they use, why and what for.

Slide

Slide No	Trainer Notes
25.	Trainer identifies special needs can include those who:

Trainer identifies special needs can include those who:

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

Classroom Activity – Internet research

Trainer supervises internet research on relevant websites for items identified above, such as:

- http://www.qantas.com.au/travel/airlines/special-travel-needs/global/en
- http://easyaccesstravel.com/
- http://www.friendshipcircle.org/blog/2012/04/04/7-travel-agencies-for-special-needs-travel/

Slide

Slide No	Trainer Notes
26.	Trainer highlights all operators will strive to meet the needs of all their special needs travellers and tourists noting legislation may require they do this but stressing there will always be limitations on what can be done in terms of: • Staff who can be supplied • Resources which can be provided. Many operators will identify what they are able to do and what they cannot supply on their web page and/or as part of their standard Terms and Conditions. **Classroom Activity – Handout** Trainer distributes and discusses Terms and Conditions from a local tour operator highlighting the sections relating to catering for special need customers.

Slide

Identify special needs for the tour

SOPs to address ‘special needs’:

- Check ‘Special request’ forms for the tour
- Read contracts for ‘custom’ and ‘private’ tours
- Adjust standard provisioning as appropriate to identified need
- Update/complete required internal documents to reflect changes made
- Communicate identified ‘special needs’ to tour staff

Slide 27

Slide No	Trainer Notes
27.	Trainer discusses SOPs to address the requirements which may arise in relation to those with special needs:

- Check the ‘Special request’ forms for the tour – most operators have these forms which are available for customers and/or sales staff to complete. These forms identify the special needs of the person/group and their names so they can be identified and their needs catered for.
- Read the contracts which have been prepared for customised and private tours – as these may be focussed on groups where some or all of the party have identified special needs. Custom tours are increasingly being organised for elderly, disabled and other special needs groups.
- Adjust the standard provisioning for the trip/tour by supplying/loading necessary items as identified by the pre-tour notifications – this can require:
  - Providing handouts and other printed materials:
    - In languages appropriate for the identified special needs traveller
    - In large print for those with vision impairment
  - Making wheelchairs available
  - Supplying baby requirements – strollers/perambulators, basinets, baby capsules/seats/restraints
  - Arranging for special food needs to cater for religious, cultural and diet-related or medical conditions

	▪ Loading special headsets for those with identified hearting problems – in situations where the tour has a scripted commentary as part of the deal ▪ Factoring in variations to standard equipment and supplies traditionally packed for similar tours – to ensure special needs are accommodated as required ▪ Purchasing additional or new equipment and supplies – to ensure promises made and customer expectations are met: always make sure these purchases occur within budget limitations/allowances ▪ Notifying destinations, attractions, joint venture partners, carriers and others of the special needs customers – so they too can prepare for their arrival and also meet their needs • Complete necessary internal documentation to reflect action taken to address special needs – these may include: ▪ Loading sheets ▪ Requisitions ▪ Purchase Orders ▪ Internal advice sheets • Pass on the identified special needs information to tour staff – such as the Tour Guides and/or Driver at the pre-tour briefing including advice regarding action taken to meet the identified need.

Slide

Slide No	Trainer Notes
28.	Trainer stresses there is a general requirement all trips/tours are operated within a budget set by management highlighting the budget is set based on a combination of factors such as: • Previous experience with similar trips/tours and general industry experience • Prices charged – to the tour group members/customers • Promises made about what will be provided – in advertisements and contracts/agreements • Need to meet legally-imposed obligations – in relation to health, safety, security and other applicable issues • Need to provide value-for-money to participants – so the trip/tour gains a good reputation which will enhance the potential for repeat and referral business • Need to meet what the opposition is doing – so the trip/tour becomes a remains a viable option for customers • Need for the organisation to generate a profit – to sustain the business and maintain and grow jobs.

Slide

Slide No	Trainer Notes
29.	Trainer states for custom and private tours the budget can be identified by: • Reading the client file for the individual tour • Talking to management • Speaking with the sales staff/consultants who negotiated the deal for the trip/tour. These tours/trips are all ‘one-off’ in nature so the resources and budget will likewise be unique for each individual trip/tour.

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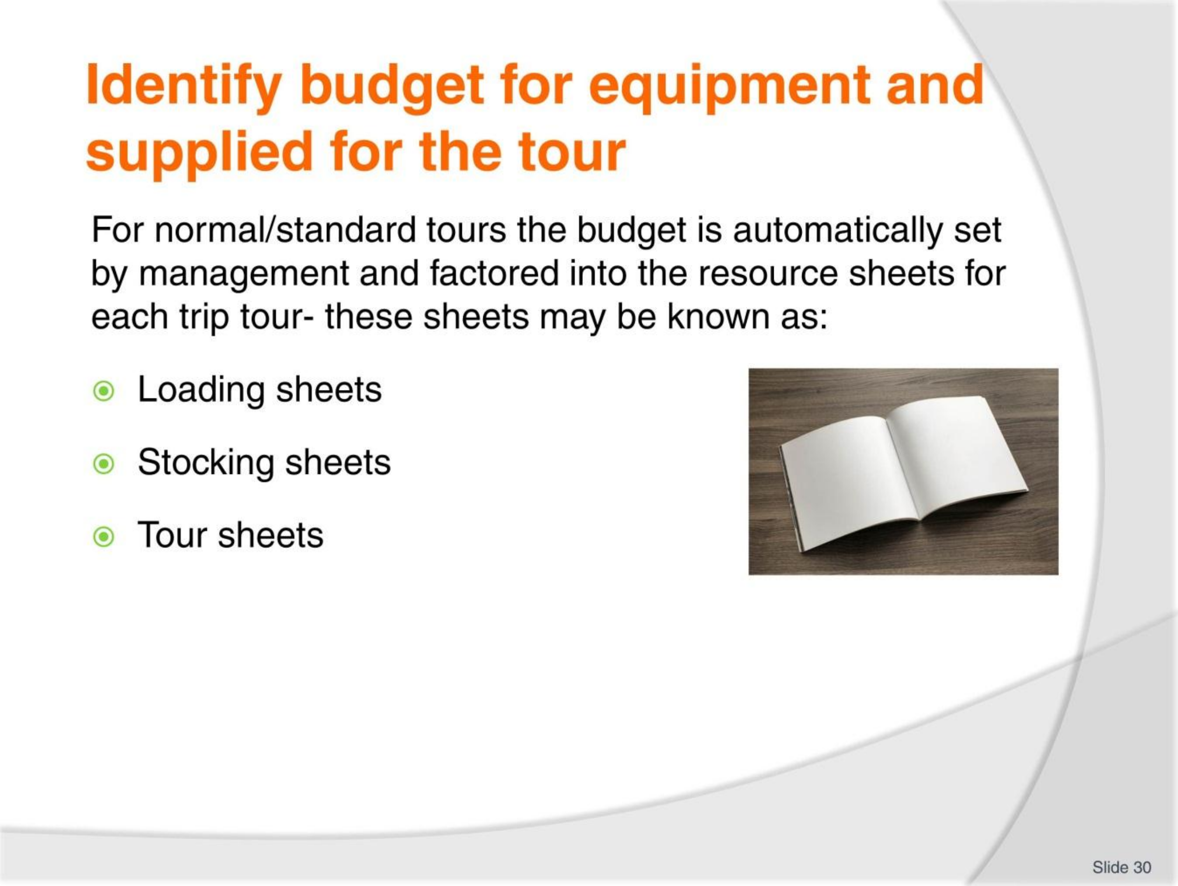
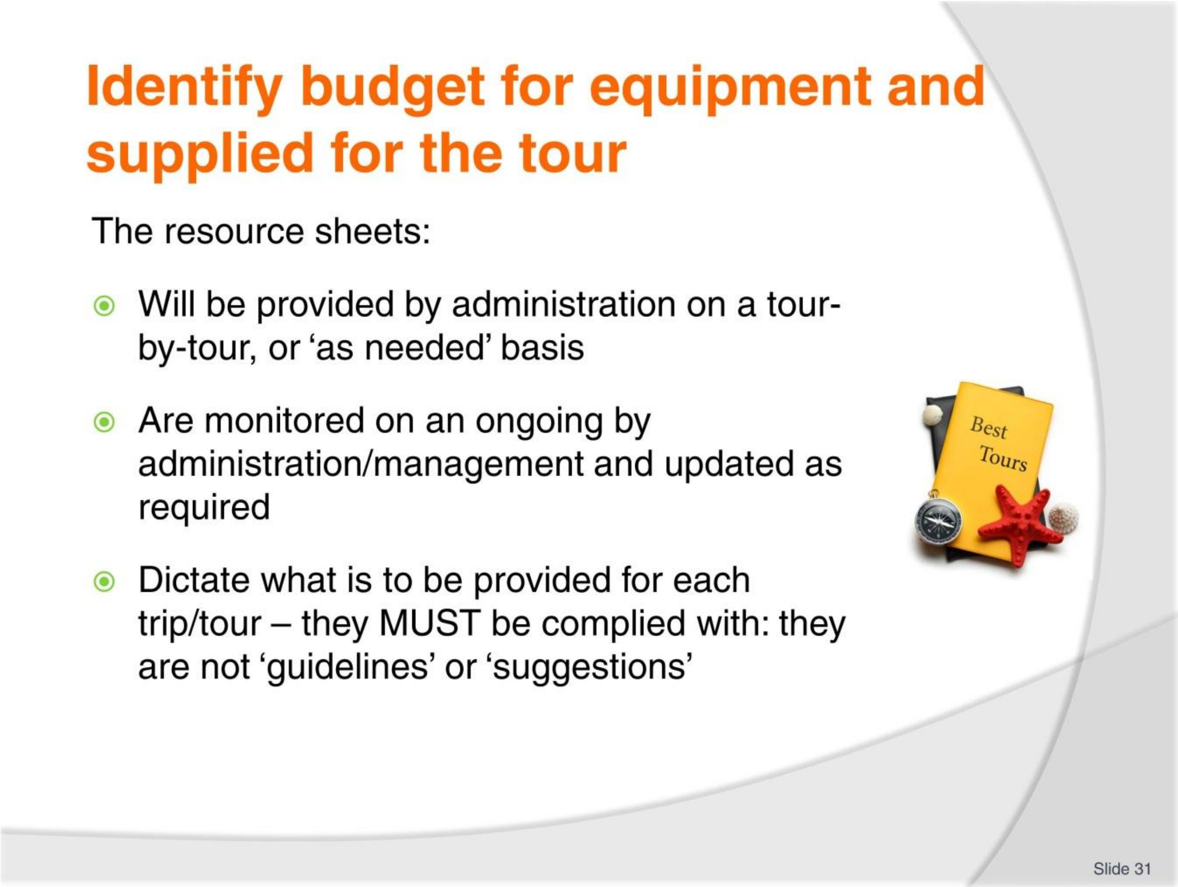


Slide No	Trainer Notes
30.	Trainer explains for other trips/tours (these are the normal/standard trips/tours conducted on a regular and ongoing basis) the budget is commonly pre-set and automatically factored into the resource sheets for each individual type of tour and these sheets are known variously as: • Loading sheets • Stocking sheets • Tour sheets.

Slide



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<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>31.</td><td>
Trainer explains commonly:

Administration/management will provide these sheets to guide the operation of the trip/tour including all necessary pre-departure checks. SOP is:

To contact them to request the Loading sheet for the trip/tour being serviced
For them to distribute the sheets at a start-of-shift staff briefing

Administration/management monitor use of listed resources to determine:

If additional supplies/resources are needed
When allocation of resources needs to change based on feedback from tour participants and tour staff
If the amount of resources can be reduced

Resources are dictated by these Loading/Stocking sheets – this means the sheets specify exactly what must be provided in terms of all resources. There is no room to adjust what is listed on these sheets. The sheets will either:

Allocate/identify the same items (by type and quantity) to every one of the same trips/tours: 'par stock'
or
Calculate the resources to be provided (by type and quantity) based on ticket sales and known special requests/need to accommodate special needs.

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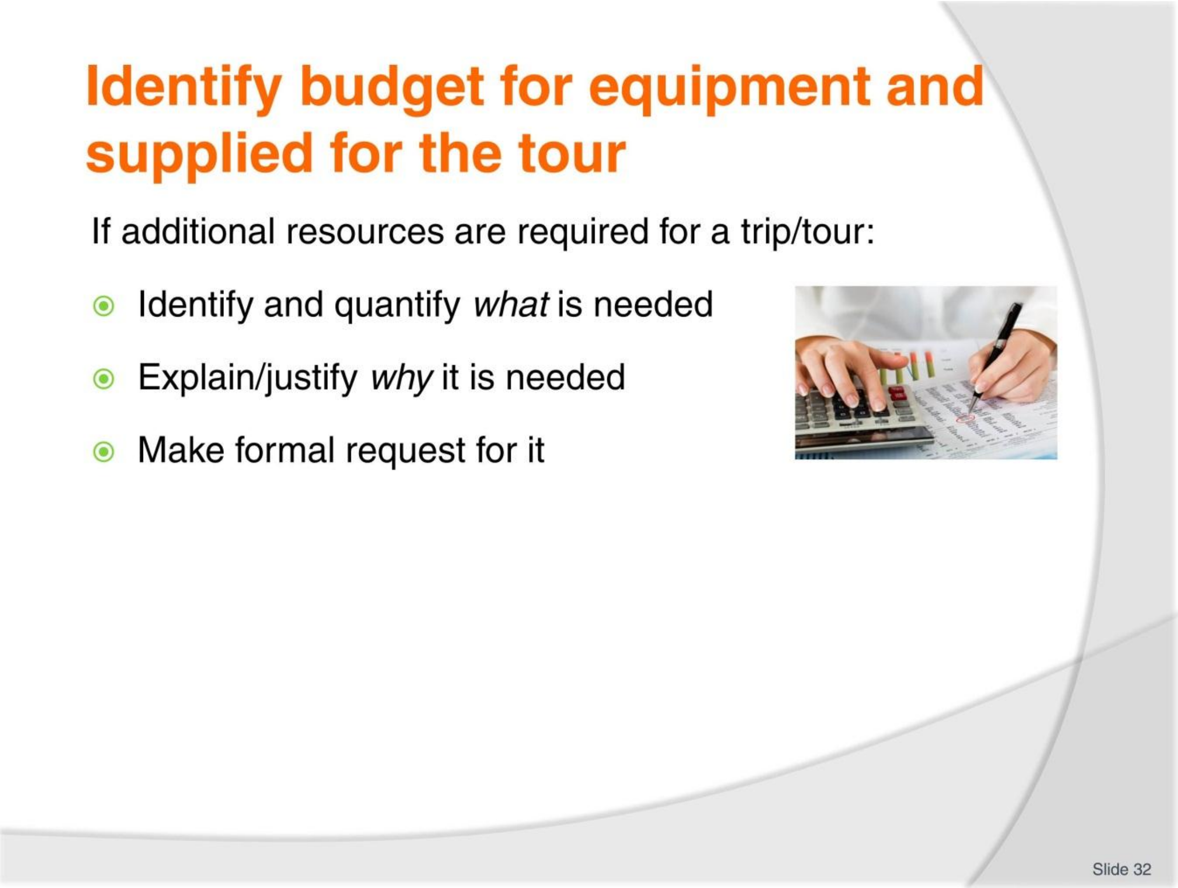


Slide No	Trainer Notes
32.	Trainer notes where there is a need to obtain extra resources these must be requested from administration/management and there is always a need to get permission before supplying more resources than officially allocated highlighting there may be a need to: • Identify and quantify what is required • Explain/justify why it is required and which trip/tour the items are required for • Complete a relevant internal document – such as a Request for Resources/Resource Request form.

Slide

Slide No	Trainer Notes
33.	Trainer states there is always an expectation common sense is used when resourcing a trip/tour. For example, if an item is listed for loading but is unavailable at the time then it is expected a substitute/alternate item is provided and when this is done: • This must be recorded – on the Stocking Sheet or on an Internal Stock Transfer (or similar) sheet • Administration/management must be advised the item is out-of-stock – and a request for additional goods (via use of a requisition form or similar) made • Staff on the trip/tour must be advised of the shortage/change made.

Slide

Slide No	Trainer Notes

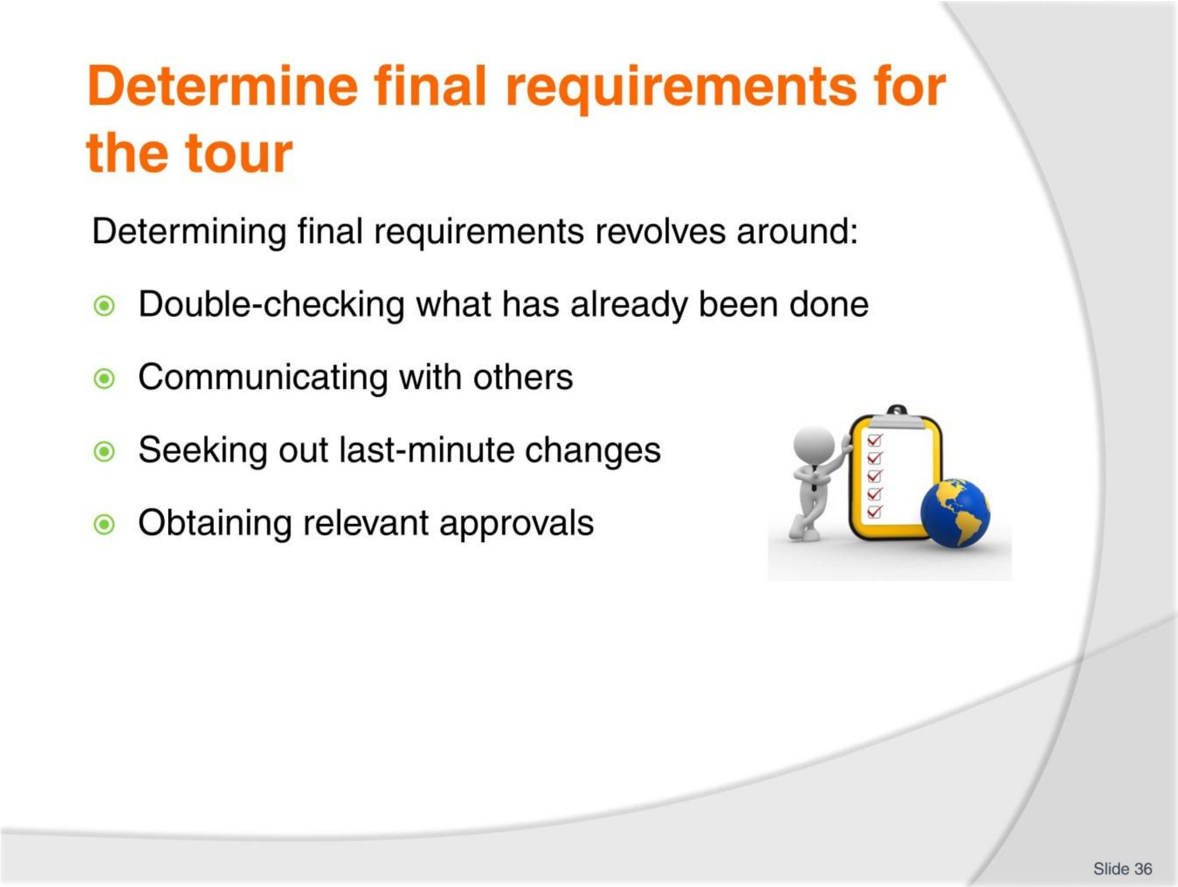
34.	Trainer notes where special purchases need to be made for trip/tour all internal protocols must be adhered to.
	These protocols generally address issues such as:
	• Need to obtain authorisation to make purchases – this may be verbal or in writing
	• Need to follow standard organisational practices – which may include:
	  ▪ Obtaining quotations
	  ▪ Raising a Purchase Order
	  ▪ Buying from 'preferred suppliers'
	• Need to notify administration/management of extra costs/costs incurred – so these can be:
	  ▪ Allocated to the correct trips/tours
	  ▪ Factored into calculations relating to financial performance of the trips/tours
	  ▪ Passed on to tour group members so all legitimate expenses can be claimed back
	  ▪ Integrated into future resource allocations for upcoming tours/trips.

Slide

Slide No	Trainer Notes
35.	Trainer describes some of the resources required for trips/tours: • Camping gear – including tents and bedding • Catering gear – including cooking and food service equipment • Maintenance equipment – such as tools, spare parts repair kits • What other resources – see Classroom Activity below. **Classroom Activity – Group Discussion** Trainer asks group to identify examples of possible other items required. Answers may include: • Recreational gear – to allow participants to relax, play games, have fun • Educational items – such as props, sample items, handouts, models, equipment to enable demonstrations and identified practical sessions, and materials to support interpretive activities • Communication equipment – for the vehicle being used, for tour staff and (where appropriate) for tour group members • PPE – needed where the trip/tour includes activities requiring protective clothing and equipment • Fuel – petrol, diesel, gas, batteries

	• Water
	• Food and beverages
	• Luggage – of the customers (where it has been forwarded) and employees/tour staff
	• Medical and first aid items
	• Commercial cargo, where applicable – commercial cargo refers to goods carried by the tour to be delivered (for a fee) to a nominated location *en route*
	• Funds or payment documentation – which may include:
	  ▪ Cash – in various currencies
	  ▪ Travellers' cheques
	  ▪ Vouchers and coupons
	  ▪ Letters/various authorities to act and/or make purchases on behalf of the host enterprise.

Slide



Slide No	Trainer Notes
36.	Trainer states determining final requirements for a trip/tour necessitates combining a series of activities which essentially revolve around: • Double-checking what has already been done – essentially a verification process • Communicating preparation activities to relevant others • Actively searching/asking about last-minute changes and/or special requests • Obtaining approval for planned resourcing and preparation actions to be implemented.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>37.</td><td>
Trainer identifies activities required are:

Confirming numbers – which demands checking to see if there are:

Additional tour party members – these may be referred to as Late Arrivals , Walk Ins. FITs
Last-minute withdrawals or cancellations
Variations in regard to where people are joining/departing the trip/tour
Significant variations in customer profiles – that is, sufficient to warrant altering the resourcing schedule/lists already prepared on the basis of (say) age, gender or other characteristics

Checking what has already been done – to verify requirements have:

Been fully identified
Factored in the required safety factor margin by quantity/amount for nominated important items of equipment and supplies
Been properly calculated and are accurate and correct
Been suitably and professionally prepared for loading

Talking to tour staff – to:

Confirm itinerary – this is necessary because resources will need to be available to support duration of the trip/tour and all planned activities

</td></tr>
</table>

	▪ Confirm tour staff – by staff and numbers: to ensure sufficient and appropriate support/facilities are supplied (as appropriate to the individual working/employment conditions of each employee) ▪ Identify and quantify resources for the trip/tour ▪ Physically inspect the resources – a checklist may be required to prove this occurred and to provide a basis for recording issues ▪ Pass on Loading sheets ▪ Identify resources which could not/have not been provided ▪ Explain intentions for physically stowing items ▪ Receive their feedback/input regarding loading requirements of resources into vehicles and containers • Being alert to the ever-present need for last-minute changes – this is a constant possibility as a result of: ▪ Late requests from tour group members ▪ Alterations which have to be made to the route, itinerary and/or activities due to (for example) weather, unexpected closure of a destination/attraction, road or travel issues, vehicle breakdown, staff absences ▪ Illness and accidents.

Slide

Determine final requirements for the tour

Addressing short-falls in resources for trips/tours may require/involve:

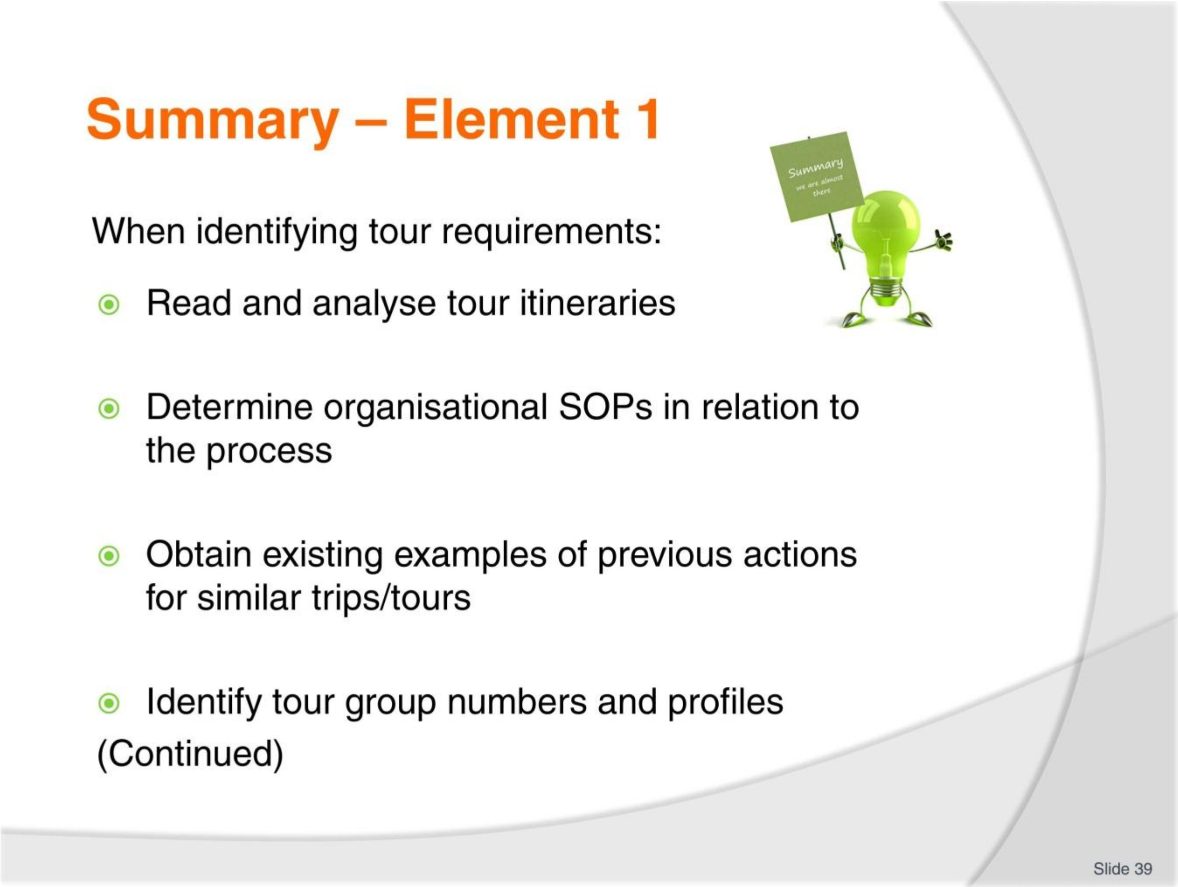
- Amendments to itinerary
- Substitutions to normal resources
- Allocation of extra resources
- Making ‘emergency’ purchases
- Making arrangements to acquire items *en route*
- Organising for items to be forwarded to group while they are on tour

Slide 38

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>38.</td><td>Trainer states where problems or short-falls in the provision of resources are identified, suitable action to address the situation must occur and the decision about what to do in these situations may be made by management or the tour staff rather than the person who has responsibility for conducting the pre-departure checks, highlighting action to address the issue may require:

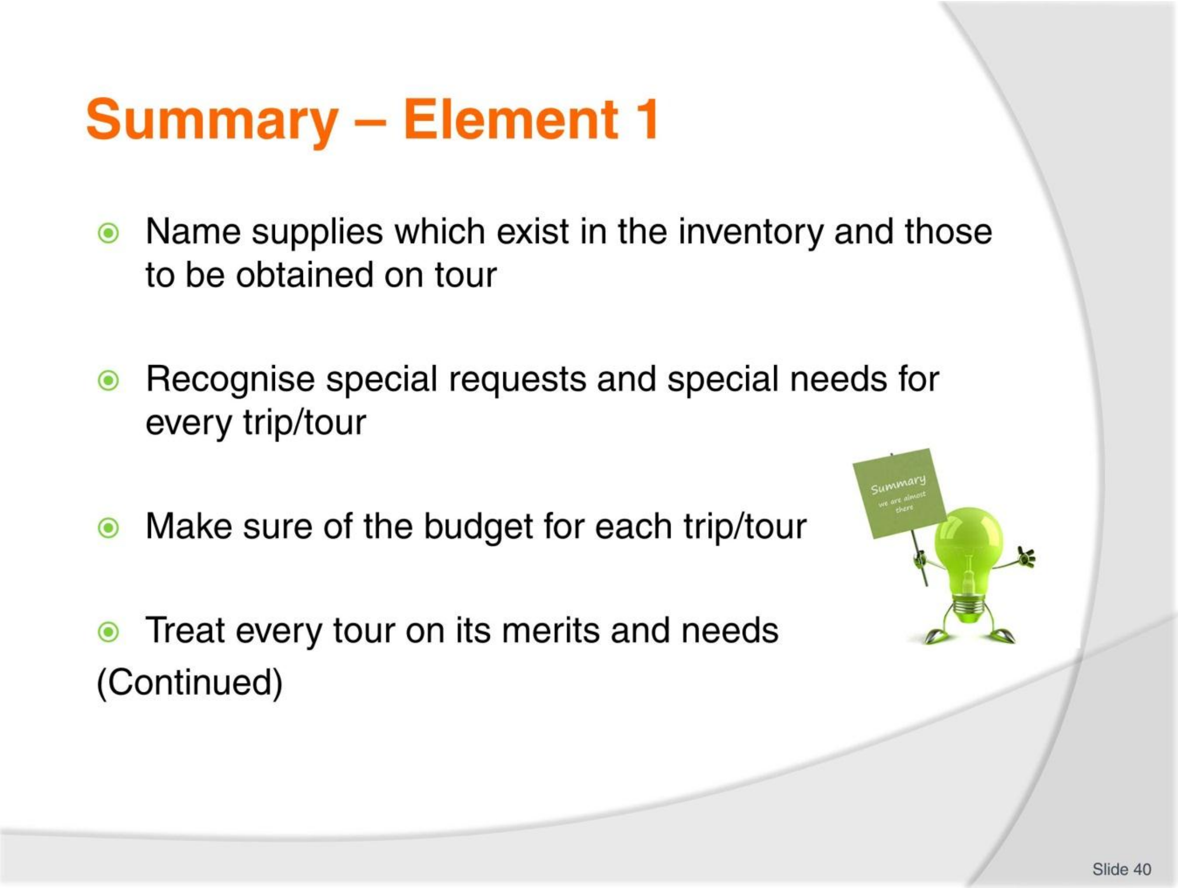
Amendments to the itinerary
Substitution of resources
Allocation of extra resources
Emergency purchase of items
Arrangements for acquiring resources en route
Organisation to enable required items to be taken to the tour group while they are actually on tour.
</td></tr>
</table>

Slide



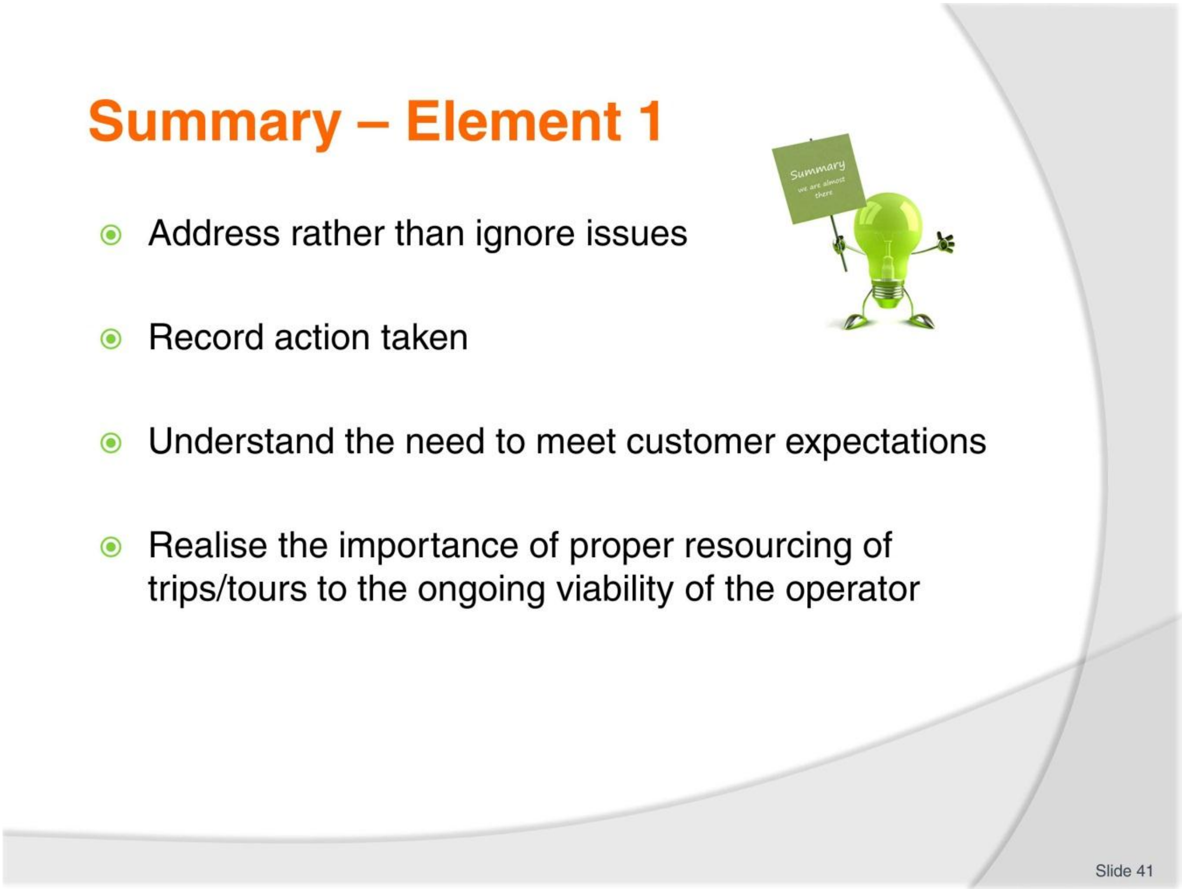
Slide No	Trainer Notes
39.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
40.	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
41.	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
42.	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 is there a need to check quantities and condition of equipment and supplies • How might you do this? • What host enterprise SOPs might exist in this regard?

Slide


Slide No	Trainer Notes
43.	Trainer notes the two key aims of this stage of the process are to: • Physically acquire required resources • Determine if additional items need to be ordered/purchased.

Slide

Obtain identified equipment and supplies

To achieve the objectives of this stage of the process there can be a need to:

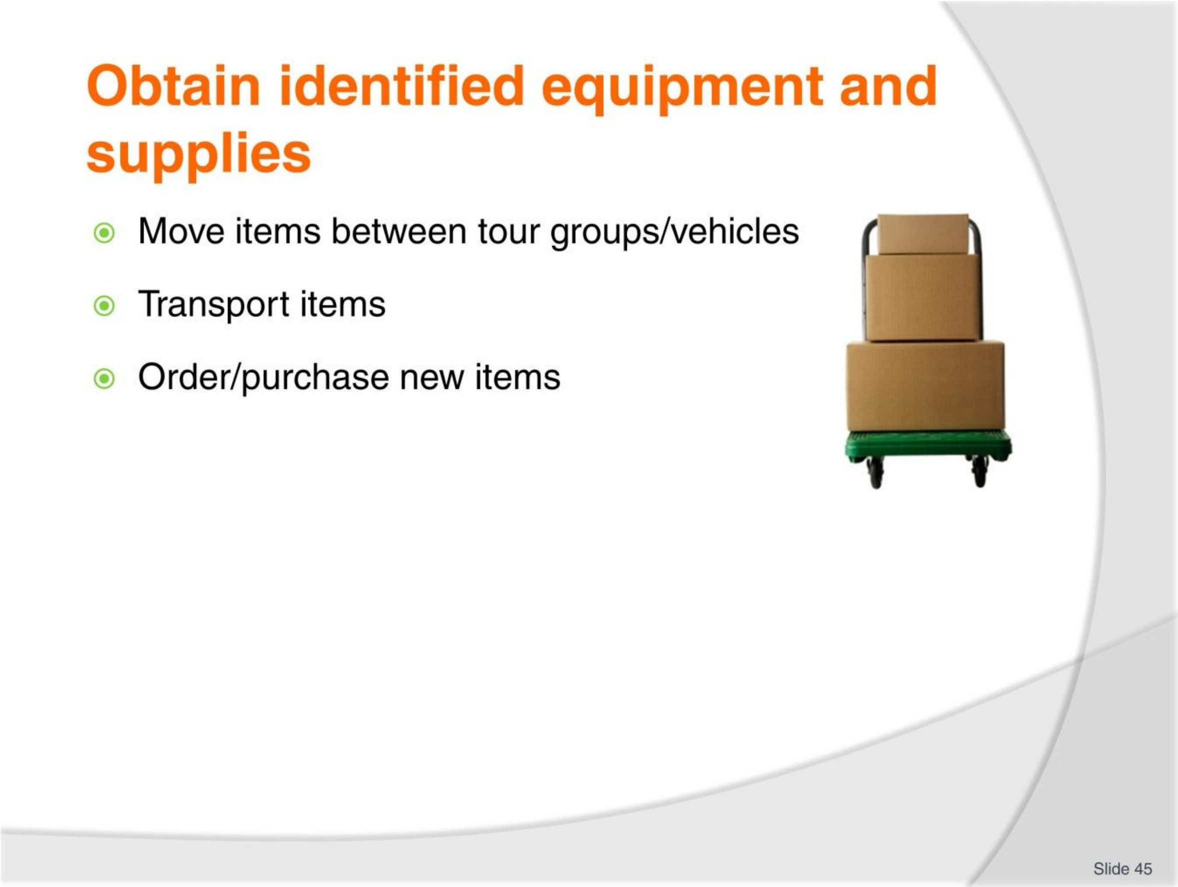
- Retrieve items from storage
- Rotate stock
- Record movement of stock

(Continued)

Slide 44

Slide No	Trainer Notes
44.	Trainer advises to achieve the objectives above there is generally a need to: • Retrieve items from storage – as identified on relevant paperwork in terms of type and quantities which could/should include: ▪ Counting of items ▪ Inspecting items/products ▪ Stowing items in patrol boxes, tour wallets and other storage containers ▪ Refrigerating and freezing foodstuffs • Rotate stock – in accordance with standard stock control principles which traditionally require: ▪ 'First In, First Out' rotation of stock, especially food and beverages ▪ Checking inspection/testing or other compliance-related dates relating to internal and/or legislated need for safety checks for other items such as safety equipment, pressure vessels and medical supplies • Record movement of stock – on nominated internal forms so: ▪ Stock control activities can be implemented ▪ Financial performance relating to use of resources can be calculated ▪ Stock outages can be avoided ▪ Inventory size can be managed/controlled.

Slide



Slide No	Trainer Notes
45.	Trainer continues describing activities required to achieve objectives of this stage: • Move items between tour groups – which can require: ▪ Unloading stock from returning tours/vehicles ▪ Completing paperwork to reflect returned stock/items ▪ Transferring returned stock/items to out-going trip/tour ▪ Updating records for out-going trip/tour to show items issued • Transport items – to the trip/tour loading area: ▪ Using trolleys and carts ▪ Following safe manual handling protocols • Order and purchase new items.

Slide

Check condition of equipment and supplies

Checking = inspecting which can entail:

- Visually looking at each item
- Spot cleaning
- Doing basic repairs

(Continued)

Slide 46

Slide No	Trainer Notes
46.	Trainer explains checking the condition of equipment and supplies means **inspecting** each item and checks can therefore entail: • Visually checking each item – to ensure it looks as it should and is clean, acceptable and appears 'fit for purpose' • Spot cleaning of items – as required, such as: ▪ Dusting ▪ Wiping ▪ Washing • Providing basic repairs – as required by the condition of items and within individual scope of ability and authority. Many items will have to be: ▪ Sent away for repairs/service ▪ Forwarded to an internal department for maintenance ▪ Repaired by technicians who need to be called in.

Slide

Slide No	Trainer Notes

47.	Trainer continues describing checks:
	• Checking dates for food and beverages – especially in relation to:
	  ▪ ‘Use By’ dates
	  ▪ ‘Best Before’ dates
	• Verifying wrapping and packaging of food – that it:
	  ▪ Is secure and complete
	  ▪ Is not torn or otherwise compromised
	  ▪ Shows no sign of pest/rodent attack or infestation
	• Ensuring items meet safety standards – as appropriate to individual items, such as:
	  ▪ Verifying operational readiness of equipment
	  ▪ Conducting test-runs on items
	  ▪ Making sure all required parts/components are in place
	• Rejecting suspect, defective, unsafe or otherwise inappropriate items – and:
	  ▪ Returning them to suppliers
	  ▪ Removing them from service
	  ▪ Completing required internal paperwork to reflect what action occurred.

Slide

Slide No	Trainer Notes

48.	Trainer explains to help ensure the required amount/number of resources is provided to match identified requirements there can be a need to:
	• Count each item – this can mean:
	  ▪ Identifying the quantity required from the Loading sheet
	  ▪ Finding the item in the store
	  ▪ Physically counting out each and every item – one-by-one
	• Weigh or otherwise measure items – which may be required for:
	  ▪ Foodstuffs – to match the catering requirements for the trip
	  ▪ Fuel – for vehicles
	• Match items to group numbers – using the accepted ratio for each item
	• Open **closed** boxes/cartons to confirm content/numbers inside – as opposed to simply *accepting* what is written on the box/container. This means there is a need to open and check/count inside:
	  ▪ Sealed cartons of goods – to ensure products match the description and there are no damaged/defective products
	  ▪ First aid kits – to make sure sufficient quantities of all required medical supplies are present and have not been used previously
	  ▪ Camping gear packs – to verify tent poles, guy ropes, tent pegs and other necessities by type and number

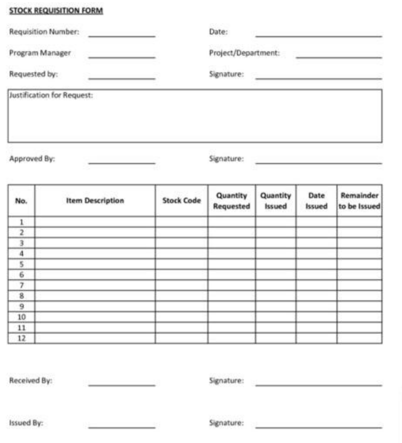
	• Physically segregate items which have been obtained and counted – so they are not used by anyone else/not loaded for another trip/tour. This can Involve: ▪ Pre-loading onto a trolley/cart ▪ Placing items into a designated staging area ▪ Maintaining security of items to ensure nothing is taken/stolen after it has been obtained.

Slide

Confirm quantity of equipment and supplies

As part of these process there can be a need to complete:

- Requisition sheets
- Transfer sheets
- Bin cards
- Database records/files
- Checklists
- Receipts



STOCK REQUISITION FORM

Requisition Number: ______ Date: ______

Program Manager ______ Project/Department: ______

Requested by: ______ Signature: ______

Justification for Request:

Approved By: ______ Signature: ______

No.	Item Description	Stock Code	Quantity Requested	Quantity Issued	Date Issued	Remainder to be Issued
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Received By: ______ Signature: ______

Issued By: ______ Signature: ______

Slide 49

Slide No	Trainer Notes

49.	Trainer identifies a range of records may need to be completed when physical resources are obtained or issued from stores:
	• Internal requisitions sheets – to order/support the taking of items from the store to trips/tours so administration can track their use for calculating financial performance of each trip/tour
	• 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 the store and allocated to a tour/vehicle but are being re-allocated to another tour/vehicle because they were not used for the initial trip/tour
	• Bin cards – showing:
	  ▪ Where items removed from stock have been allocated
	  ▪ When they were taken
	  ▪ How many were allocated
	  ▪ Who authorised their removal/took them
	  ▪ Number/amount of remaining stock-on-hand

	• 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 – see next section ▪ Receipts – see next section. **Classroom Activity – Handouts** Trainer distributes and discusses examples of documents as identified on slide.

Slide

Ensure compliance with host enterprise protocols for equipment and supplies

It is important to understand:

- All internal SOPs relating to the identifying, issuing and obtaining of equipment and supplies for trips/tours **must be complied with**
- Compliance with policies and protocols is not optional
- Problems must be reported

Slide 50

Slide No	Trainer Notes

50.	Trainer states it is important to understand:
	• All internal SOPs, policies and protocols relating to the identifying, issuing and obtaining of equipment and supplies for trips/tours must be complied with – this is a **non-negotiable requirement** for all staff every time they prepare a trip/tour.
	  ▪ This means compliance is NOT optional.
	• Any problems or inability in complying with these requirements must be reported. Reports must be made:
	  ▪ To supervisor/management
	  ▪ Immediately – so a decision can be made straight away about remedial action to be taken
	  ▪ Verbally – explaining details of the issue/problem
	  ▪ With suggestions (if possible) about what can be done to effectively address the problem.

Slide

Ensure compliance with host enterprise protocols for equipment and supplies

Reasons to comply with internal SOPs – to ensure:

- Every trip/tour is provisioned with all the resources required
- Each trip/tour operates an a profitable basis
- Trips/tours comply with legislated obligations
- The products and services supplied satisfy customers

Slide 51

Slide No	Trainer Notes
51.	Trainer explains the need to comply with host enterprise protocols for equipment and supplies is necessary in order to ensure: • Every trip/tour is provisioned with all the resources required – the Loading Lists and similar have emerged over time as being the items vital to enable/support the tour as advertised • Each trip/tour operates an a profitable basis – as the resourcing for each trip/tour has been determined and costed by management to optimise the financial performance of the business • Trips/tours comply with legislated obligations – relating to the health, safety and welfare of tour group members and staff • The products and services supplied satisfy customers – in terms of meeting their expectations, matching what has been delivered on previous trips/tours and honouring promises made in advertisements/promotions about the trip/tour.

Slide

Ensure compliance with host enterprise protocols for equipment and supplies

Practical action – can/will focus on:

- Using pre-determined ratios:
  - Figure/ratio set by administration to calculate the number of items to supply based on tour group numbers and a range of other factors
  - Must be followed where they exist

(Continued)

Slide 52

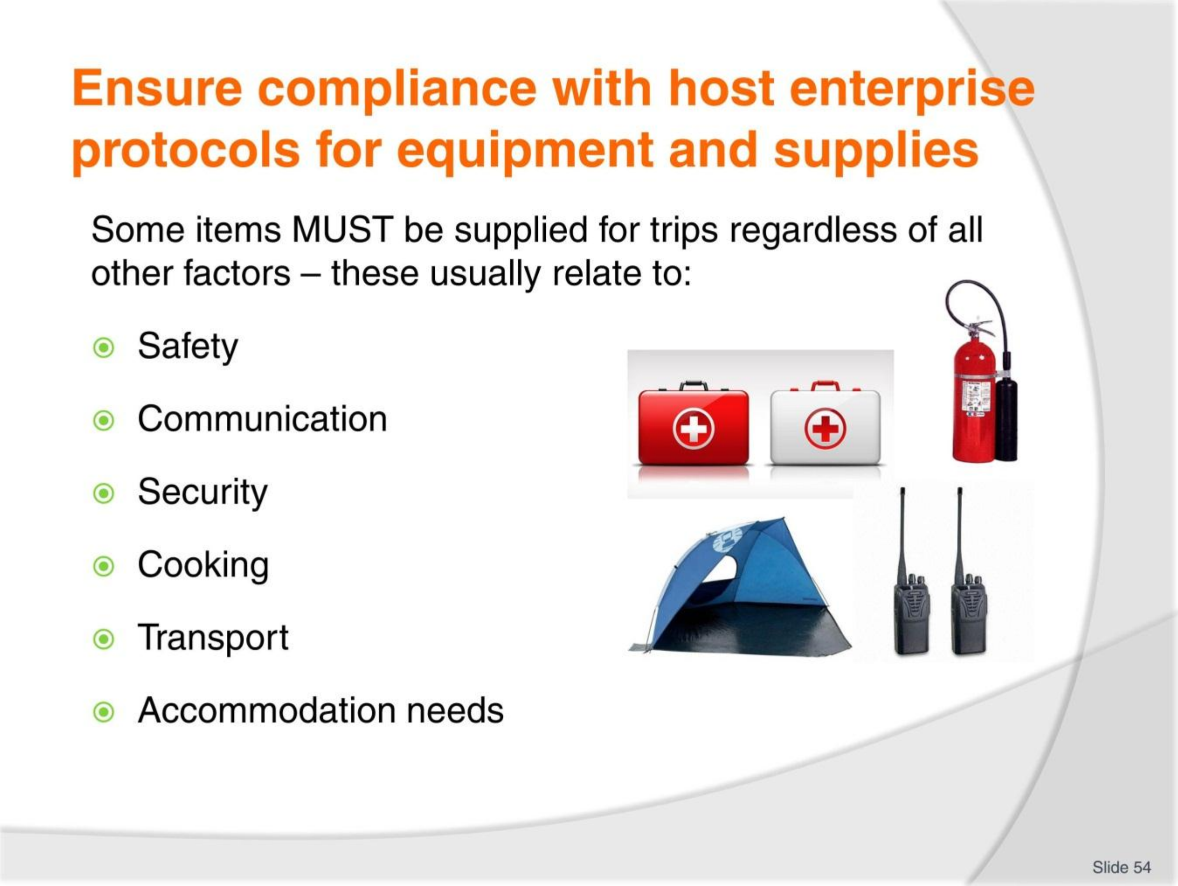
Slide No	Trainer Notes
52.	Trainer advises practical actions focus on: Host enterprise protocols for equipment and supplies may include: **Using pre-determined ratios** • There is a commonly throughout the industry a need to apply pre-determined ratios to the resourcing of trips/tours • This ratio will stipulate the amount of equipment and/or supplies for every tour group member while on tour The ratio provided by management: • Has emerged over time as being what is necessary to provide the required level and standard of service and safety • Is used to calculate costs and the financial performance of each trip/tour • Is a **compulsory** figure which MUST be used when providing supplies/resources for a trip/tour – it is not open to interpretation or change • Determines the final quantities of certain items to be supplied for some trips/tours. For example: ▪ The ratio may be 1:1 for some items – that is, one item needs to be provided for every person ▪ For other items the ratio may be 5:1 – that is, five items/per trip for every person.

Slide

Slide No	Trainer Notes

53.	Trainer continues discussing practical in this regard:
	Using checklists
	• Most operators use dedicated Checklists to assist with providing and checking resources for trips/tours
	  ▪ See more on later slides.
	Using receipts
	• It is SOP for receipts to be issued to verify/prove cash, vouchers and similar (company credit cards, travellers' cheques, company authorisations) were given to Tour Guides/Leaders.
	• A standard 'Receipt Book' is commonly used which will detail:
	  ▪ Date
	  ▪ Reference number
	  ▪ Details of item/s
	  ▪ Value
	  ▪ Reason cash/item is provided
	  ▪ Name of trip/tour
	  ▪ Name and signatures of:
	  ▪ Person providing item/cash
	  ▪ Person accepting/confirming they have received the cash/item(s).

Slide



Slide No | **Trainer Notes**

54.

Trainer advises for all/many trips and tours there can be certain non-negotiable requirements that must ***always be provided*** regardless of all other provisions and/or considerations highlighting this means despite other similar equipment supplied, the mandatory items must still be loaded for the tour and these generally they relate to:

- Safety – such as:
    - Emergency management plans; Fire extinguishers; Medical kits; Locator beacons/EPIRB
- Communication – such as:
    - Cell phones/hand phones; Two-way radios; Satellite phones
- Security – such as:
    - Alarms; Cameras; Locking devices
- Cooking – such as:
    - Designated items for basic food and beverage *service;* Listed items to enable the *production* (and service) of nominated standard menu items
- Transport – such as:
    - Vehicle recovery gear; Satellite navigation; Service kits and tools; Replacement parts

	• Accommodation needs – such as: ▪ Tents; Bedding; Toilets. **Classroom Activity – Sample items** Trainer provides a range of items from those listed on the slide for students to familiarise themselves with.

Slide

Acquire additional equipment and supplies where needed

Options for obtaining extra resources in the short-term:

- Re-locating items from one place to another
- Asking competitors (with whom there is a mutual arrangement) for help
- Requesting ‘emergency’ provision from suppliers
- Contacting destinations and trying to organise a solution through them

Slide 55

Slide No	Trainer Notes
55.	Trainer notes in the immediate short-term where extra resources are required it may be possible to: • Move 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’ (or staging area) 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 • Source required resources by: ▪ Contacting another tour operator (even a business which is in direct competition) and asking to borrow required items from them – in many cases there is an effective ‘working relationship’ for mutual benefit even between many fierce 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

	• Contact destinations and attractions – and making enquiries in relation to: ▪ Whether they have their own resources as required which can be used by the trip/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.

Slide

Acquire additional equipment and supplies where needed

Long-term options for obtaining extra resources:

- Buying or leasing items
- Servicing damaged items to get them back into service
- Amending tours to reflect resources which are available
- Developing new/revised tours (and/or selling prices of tickets) to reflect the situation

Slide 56

Slide No	Trainer Notes
56.	Trainer suggests the business may elect to look at one or more of the following in terms of long-term plans to address issues raised by the need for additional resources: • Acquire extra resources as identified –which may involve: ▪ Purchasing more items ▪ Leasing items • Service damaged items – which means organising and providing repairs and maintenance in order to return unsafe/unusable items back to a required standard of serviceability so there is a bigger pool of items available to use • Amend current standard tours – by: ▪ Changing the itineraries and inclusions as necessary on the basis of the resource issue/s 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 replacing 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. **Classroom Activity – Small Group Exercise** Trainer identifies/describes a trip/tour and nominates one or more resources which are necessary for that tour. Trainer explains for the purposes of this exercise these resources are unavailable, and asks students to develop a viable plan to resolve this situation.

Slide

Verify identified equipment and supplies with tour staff

It is important to note:

- Every workplace has its own SOPs in this regard
- All organisation-specific protocols are MANDATORY

Slide 57

Slide No	Trainer Notes
57.	Trainer advises: • Every organisation has developed its own protocols in this regard • While all operators will follow *generally* applicable practices and procedures there will be workplace-specific variations and these **must** be adhered to as they apply to each business.

Slide

Verify identified equipment and supplies with tour staff

For larger trips/tours a final planning session is held:

- 2 – 3 days before tour departure
- With all tour staff to conduct detailed review of itinerary
- Confirm resources provided will meet identified need
- Determine if/where extra resources are required

Slide 58

Slide No	Trainer Notes
58.	Trainer explains SOPs in relation to verifying trip/tour supplies: **Holding final planning session** For larger trips/tours there is usually a final planning session held two to three days before departure to identify last-minute requirements. This is: • A meeting with all tour staff • A **detailed review** of the itinerary – matching all projected activities against ‘resources required’ (by type and quantity) for each activity on an activity-by-activity basis. The objectives of the meeting are to: • Confirm resources *provided* will actually meet resources *required* • Identify deficiencies and need for extra/different resources.

Slide

Verify identified equipment and supplies with tour staff

For custom or private tours:

- Host/tour group representative may be invited to join the review process

  or

- Tour group may be ‘contacted’ for their final input regarding last-minute requirements and confirmation of arrangement

Slide 59

Slide No	Trainer Notes

59.	Trainer further describes verifying procedures for
	Private and Custom tours
	Where custom and/or private tours are being prepared it is common to:
	• Invite host/tour group representative/s to attend, or
	• Contact tour group representative/s by telephone to:
	  ▪ Get their final input
	  ▪ Identify last-minute requests
	  ▪ Confirm arrangements already made.

Slide

Verify identified equipment and supplies with tour staff

A paper-based check may be made:

- Involving all tour staff
- Distributing relevant trip/tour documentation
- Handing out copies of Loading sheets
- Discussing/evaluating Loading sheets

(Continued)

Slide 60

Slide No	Trainer Notes

60.	Trainer further describes verifying procedures:
	Undertaking final paper-based check
	One SOP is the undertaking of a final paper-based consideration of the Loading list/manifest for equipment and supplies.
	This involves:
	• Sitting down with tour staff
	• Giving each member of the tour staff a copy of tour details – that is:
	  ▪ Tour group numbers
	  ▪ Group profiles
	  ▪ Itinerary
	  ▪ Copies of contracts/agreements for private or custom tours
	• Distributing copy of Loading sheet/manifest to each tour staff member
	• Evaluating the contents of the Loading sheet/manifest – which requires:
	  ▪ Identification of materials provided
	  ▪ Analysis of projected use
	  ▪ Confirmation of resources provided
	  ▪ Identification of situations where *more* resources are required
	  ▪ Identification of situations where *different* resources are required.

Slide

Slide No	Trainer Notes
61.	Trainer continues discussing final paper-based verification: • Reviewing Operations Package/Manual – and checking, reviewing and/or confirming: ▪ Emergency Plans ▪ Permissions and permits – authorisations necessary to enter certain places/areas ▪ Codes of Conduct – to guide behaviour in nominated areas in order to respect communities and cultures and/or enable responsible environmental actions ▪ Contact lists – list of local offices, local personnel, phone numbers • Determining course of action where extra/different resources are required – for example: ▪ Supply of what is required – if budget/scope of authority allows ▪ Request (with appropriate justification) to management for permission for extra resources • Signing-off by tour staff on the Loading sheets as being appropriate for the trip/tour to be conducted.

Slide

Verify identified equipment and supplies with tour staff

A physical check can be made:

- With or after the paper-based check
- Usually at the staging area
- By counting and inspecting resources
- Determining action if more/different resources are identified as being necessary
- Signing-off the Loading sheet

Slide 62

Slide No	Trainer Notes
62.	Trainer further describes verifying procedures: **Conducting physical check** The physical check of the resources may occur: • At the same time as the paper-based check is undertaken • After the paper-based check has confirmed the ‘in principle’ provision of supplies. Conducting a physical check means: • Going to the staging area for the trip/tour – where all the resources have been assembled • Counting items – and confirming numbers on Loading sheets • Inspecting equipment and supplies that have been assembled for the tour – to ensure they are as expected and in good condition • Deciding on action to take – to address situations where the check reveals sub-standard, inappropriate or otherwise unsuitable items • Signing off on the resources provided – on the loading sheet or a duplicate Checklist.

Slide

Slide No	Trainer Notes
63.	Trainer further describes verifying procedures: **Becoming familiar with operation of resources** Where new/different resources are provided it is standard procedure for tour staff to become familiar with items before the tour departs. It is not recommended/professional for tour staff to have their first experience with new equipment/supplies on tour where their actions can be seen by tour group members. Becoming familiar can involve: • Distribution and reading of User Manuals/Operator Instructions or similar • Demonstration of how to use items by manufacturers • Opportunities for practice/drill with the items.

Slide

Slide No	Trainer Notes
64.	Trainer further describes verifying procedures: **Inspecting tour vehicle** Another common practice is to physically inspect the tour vehicle(s) and trailer(s) as well as any support transport which will be used to re-stock/replenish the tour. Inspections will: • Check service to vehicle/s and trailers has been conducted as required • Test operations of certain aspects of the vehicle – a Checklist is commonly used • Verify registration and roadworthiness of vehicle/s • Make sure vehicle is clean and properly stocked • Feature a test drive of the vehicle.

Slide

Verify identified equipment and supplies with tour staff

Contingency plans – are:

- Prepared in advance for predictable events which might materialise but which DO NOT constitute and emergency situation
- Often referred to as 'Plan B'
- Contained in the Operations Package/Manual
- Often available through electronic means

Slide 65

Slide No	Trainer Notes
65.	Trainer discusses Contingency plans stating: • Contingency plans are plans prepared for tour staff to follow in case certain predictable events materialise • They are Plan B – they detail what will be done when Plan A (what should *normally* occur) cannot happen/take place • These events are not 'emergencies' (that is, they do not put life or property in danger) but they have the potential to cause disruption to the trip/tour • Contingency plans are prepared in advance/before the tour departs and provided for tour staff, often in the same Operations Package that contains the Emergency Plans for the group/trip • All plans are usually also available in soft copy form via various electronic options such as iPhones, iPads or tablets.

Slide

Slide No	Trainer Notes
66.	Trainer continues discussing Contingency plans stating: • Events which may trigger the need to activate a contingency plan include: ▪ Bad weather preventing implementation of a planned activity ▪ Unexpected closure of an advertised attraction ▪ Unavailability of a reserved accommodation venue ▪ Road closure preventing or delaying access to a destination ▪ Permits and permissions which were granted have been revoked.

Slide

Verify identified equipment and supplies with tour staff

Verification should include confirming contingency plans which involves:

- Reviewing existing plans
- Modifying plans where needed
- Revising the plans and:
  - Sharing them with tour staff
  - Including them in the Operations Manual/Package

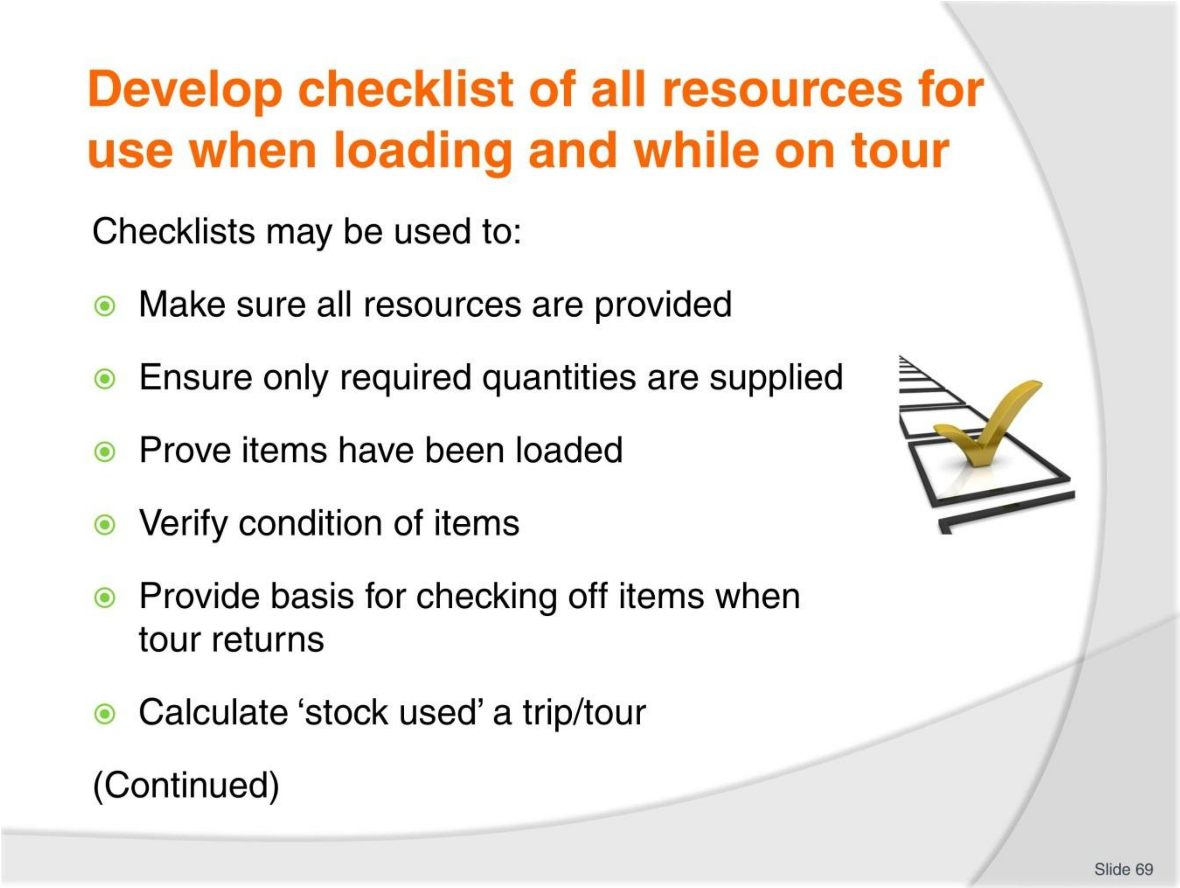
Slide 67

Slide No	Trainer Notes
67.	Trainer continues discussing Contingency plans stating: • Confirming contingency plans for a trip/tour generally requires: ▪ Reviewing existing plans ▪ Modifying/adapting existing plans as applicable to reflect updated circumstances and/or known factors – such as: – Weather – Road conditions – Seasonal factors – Recent experience – Input from other tours/guides/operators ▪ Re-writing/revising plans – or creating new ones – and incorporating them into the Operations Package/Folder.

Slide

Slide No	Trainer Notes
68.	Trainer notes: • Checklists are prepared by individual tour operators • They are developed on a tour-by-tour basis and differ for each trip/tour to reflect the individual needs of each trip/tour • Items on these lists may vary between seasons.

Slide



Slide No	Trainer Notes
69.	Trainer states Checklists can be used to: • Make sure all required items are supplied • Resources are provided (only) in the required quantity • Prove the listed items were delivered/supplied as listed • Verify the condition of the items – the checklists provide a method by which sub-standard or deficient items can be recorded ('Missing' or 'Not Supplied') • Provide a basis for checking off items when the tour returns • Enable calculation of 'stock used' by each trip/tour for the purposes of determining the financial performance of each trip/tour.

Slide

Develop checklist of all resources for use when loading and while on tour

- Guide inspections of vehicles
- Check F&B supplied – in terms of type, food safety and quantities
- Describe tasks to be undertaken before a trip/tour departs

Some Checklists indicate a need to use/refer to **another** Checklist.

Slide 70

Slide No	Trainer Notes

70.	Trainer states Checklists can also be developed to guide *actions required* in certain circumstances noting for example, operators may generate:
	• A Vehicle Inspection Checklist which lists all the things to be tested and inspected on the vehicle to which the checklist applies
	• A separate checklist for food and beverages – listing food handling protocols which need to be followed to optimise food safety, such as:
	  ▪ Date checking
	  ▪ Taking of temperatures for hot, refrigerated and frozen food
	  ▪ Completion of food safety records
	• A pre-departure checklist identifying, in sequential order, the tasks to be undertaken before a trip/tour leaves.
	Checklists within checklists
	There can be situations where one checklist requires the user to use *another* checklist.
	For example, the checklist for loading supplies for a trip/tour may indicate the need to load 'First aid kit – 1' and there can be an asterisk (*) indicating there is a checklist inside the First Aid kit which lists the supplies which must be provided by name and quantity.

Slide

Develop checklist of all resources for use when loading and while on tour

Checklists are used/need to be signed by:

- Person **issuing** resources for a trip/tour
- Person **taking delivery/accepting** resources for a trip/tour

Slide 71

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>71.</td><td>
Trainer explains Checklists for equipment and supplies are used:

By the person issuing the items for the trip/tour – who:

Identifies the items by type and quantity as listed on the checklist
Picks/obtains the items from the store – and:
Ticks off the items as being picked/selected
or
Writes in the actual number provided if this figure is less than what is identified on the list

Adds unlisted items to the list – if extra items are approved for loading

By the person taking delivery of the equipment and supplies – who:

Uses the checklist completed by the person provided the resources to count/check/verify all the listed items have been provided in the quantities stated
Writes on the form any discrepancies identified.

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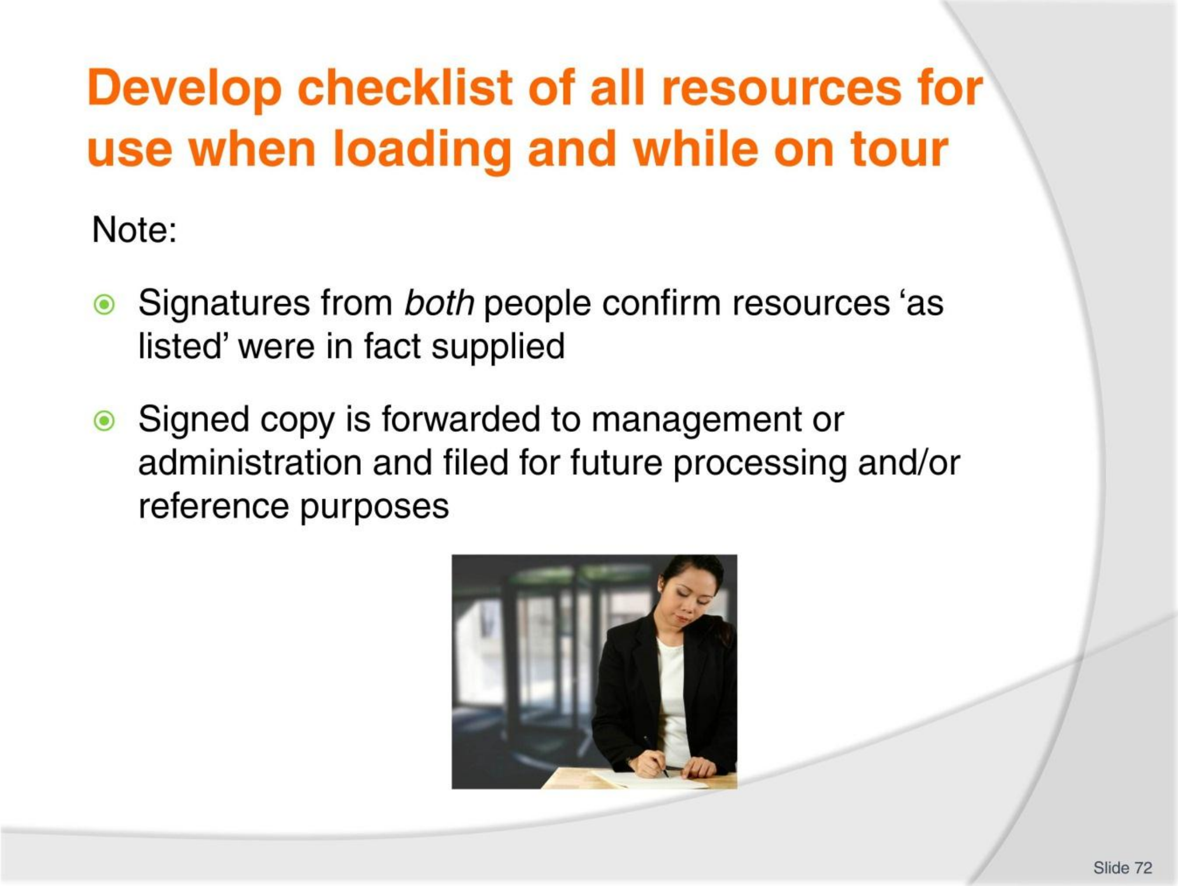
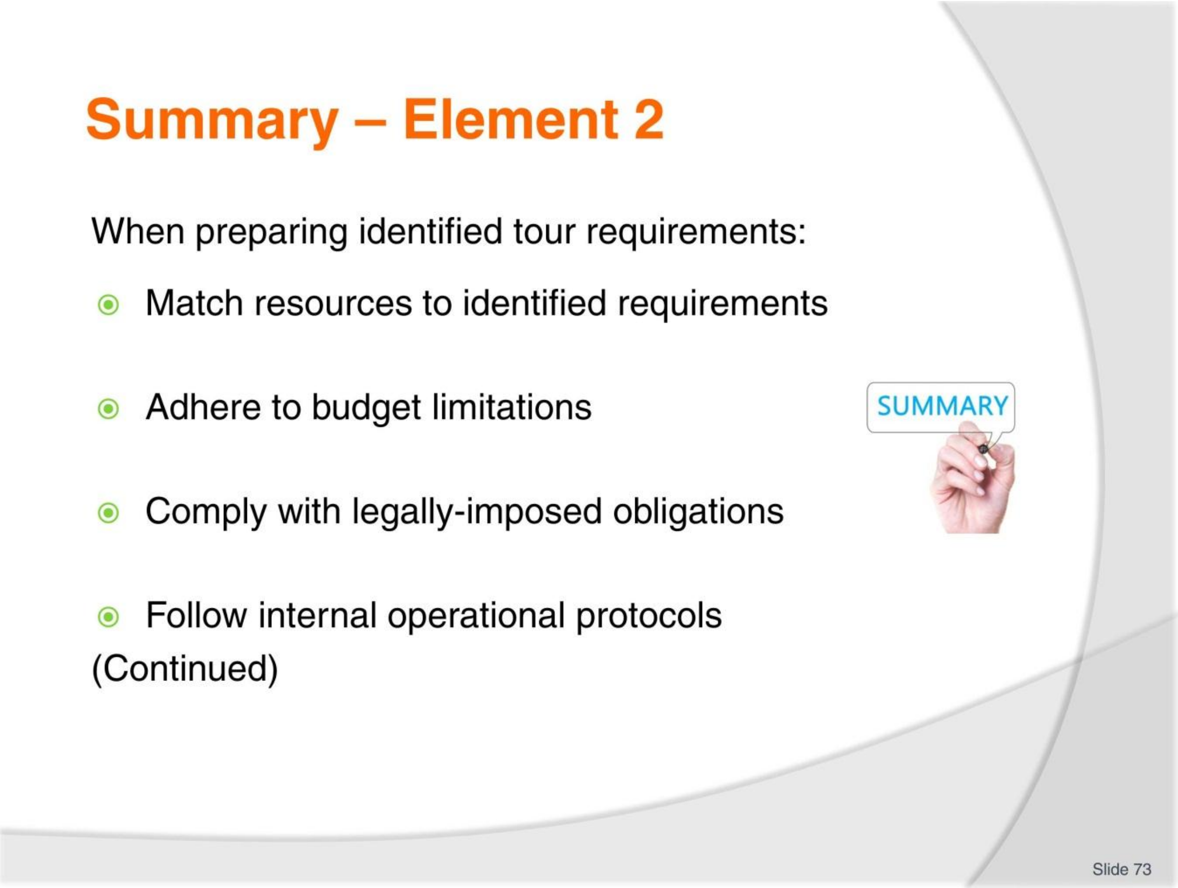
Slide



Slide No	Trainer Notes

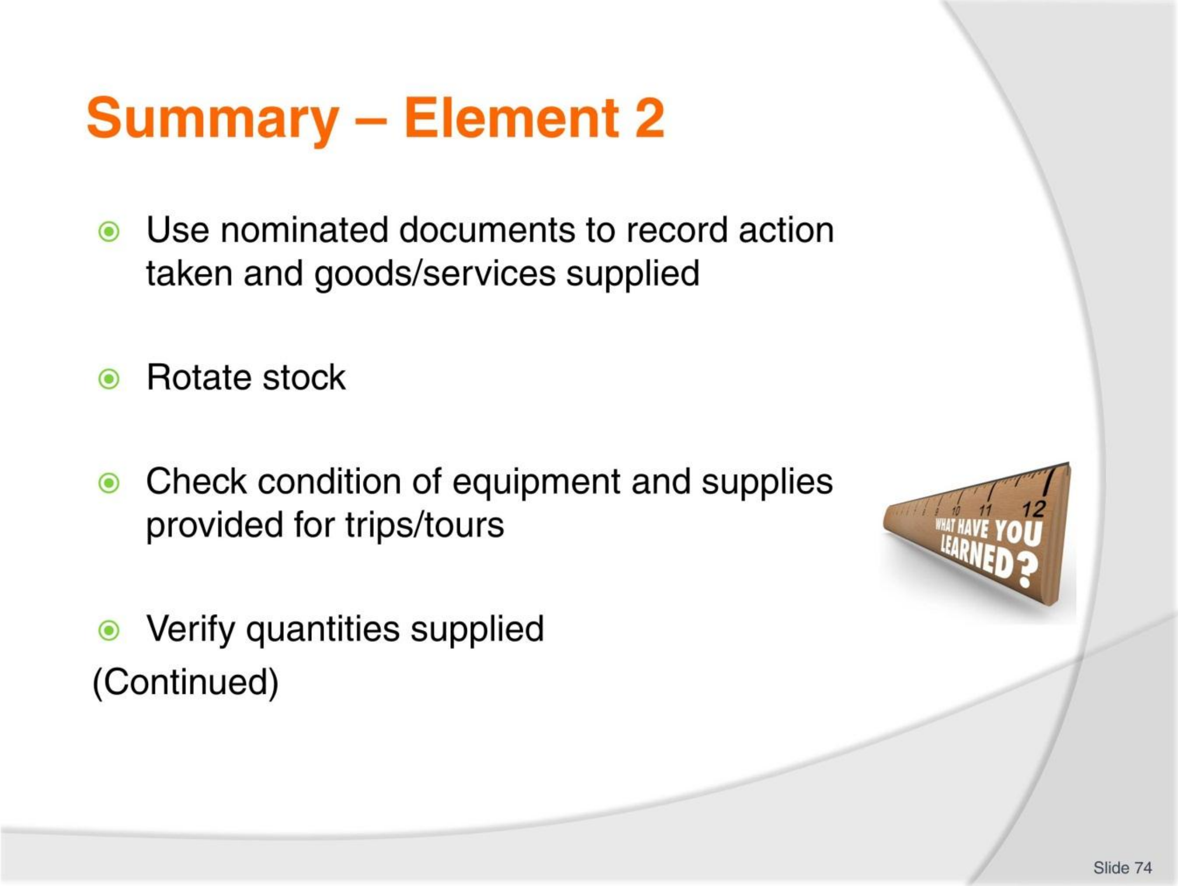
72.	Trainer highlights:
	• Signatures from both persons on the Checklist confirm the resources listed were supplied and received.
	• The signed and completed form is then:
	• Forwarded to management/administration – for them to process
	• Copied and filed for future use – such as:
	  ▪ To assist with queries
	  ▪ To serve as a reference point for supplying future trips/tours
	  ▪ To use for recording unused items returned when the trip/tour returns.

Slide



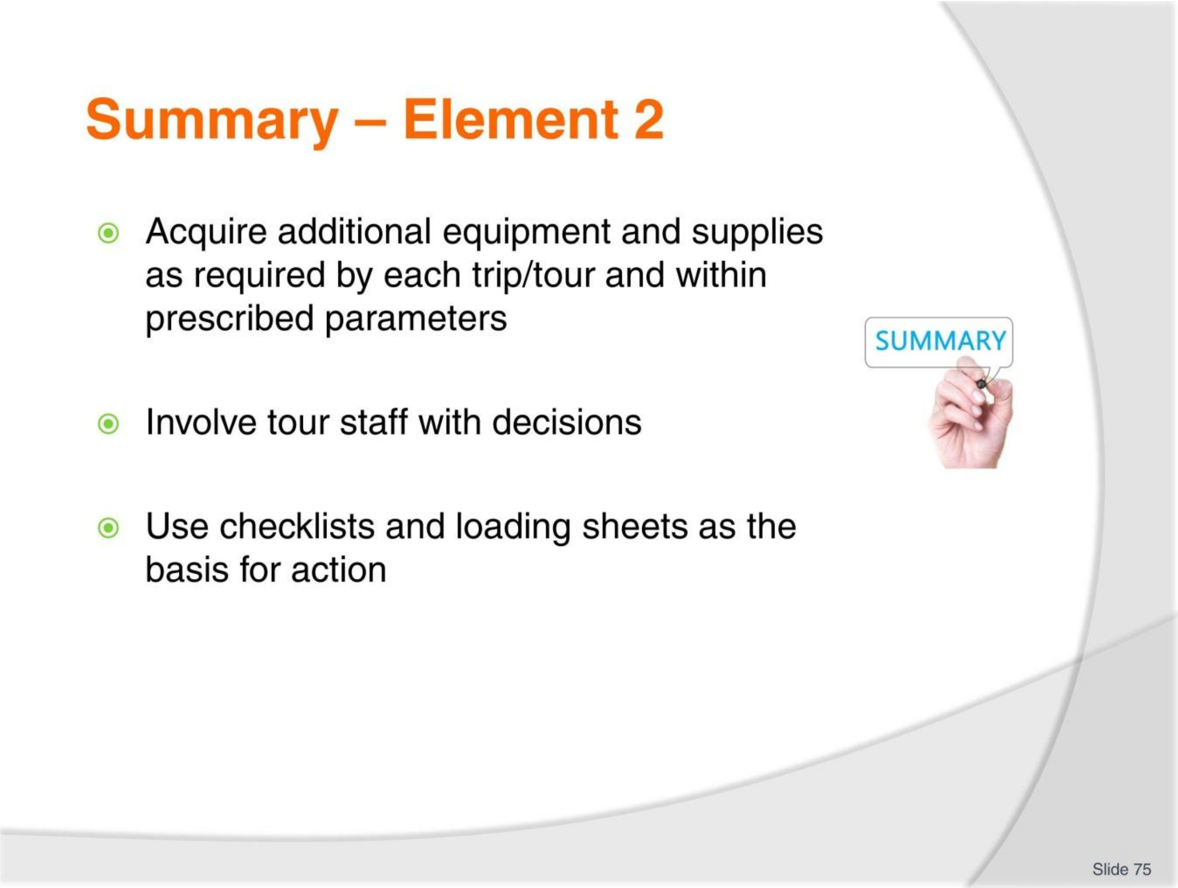
Slide No	Trainer Notes
73.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide



Slide No	Trainer Notes
74.	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
75.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

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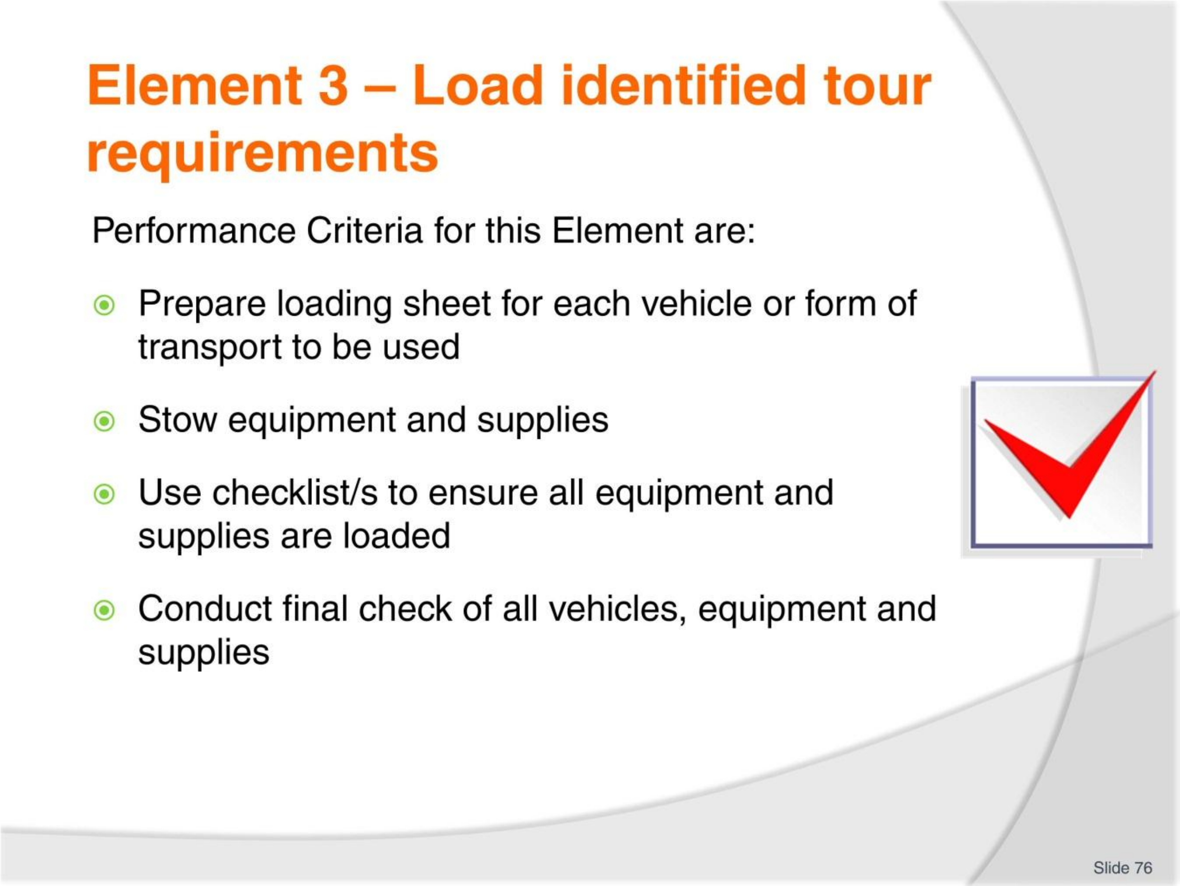
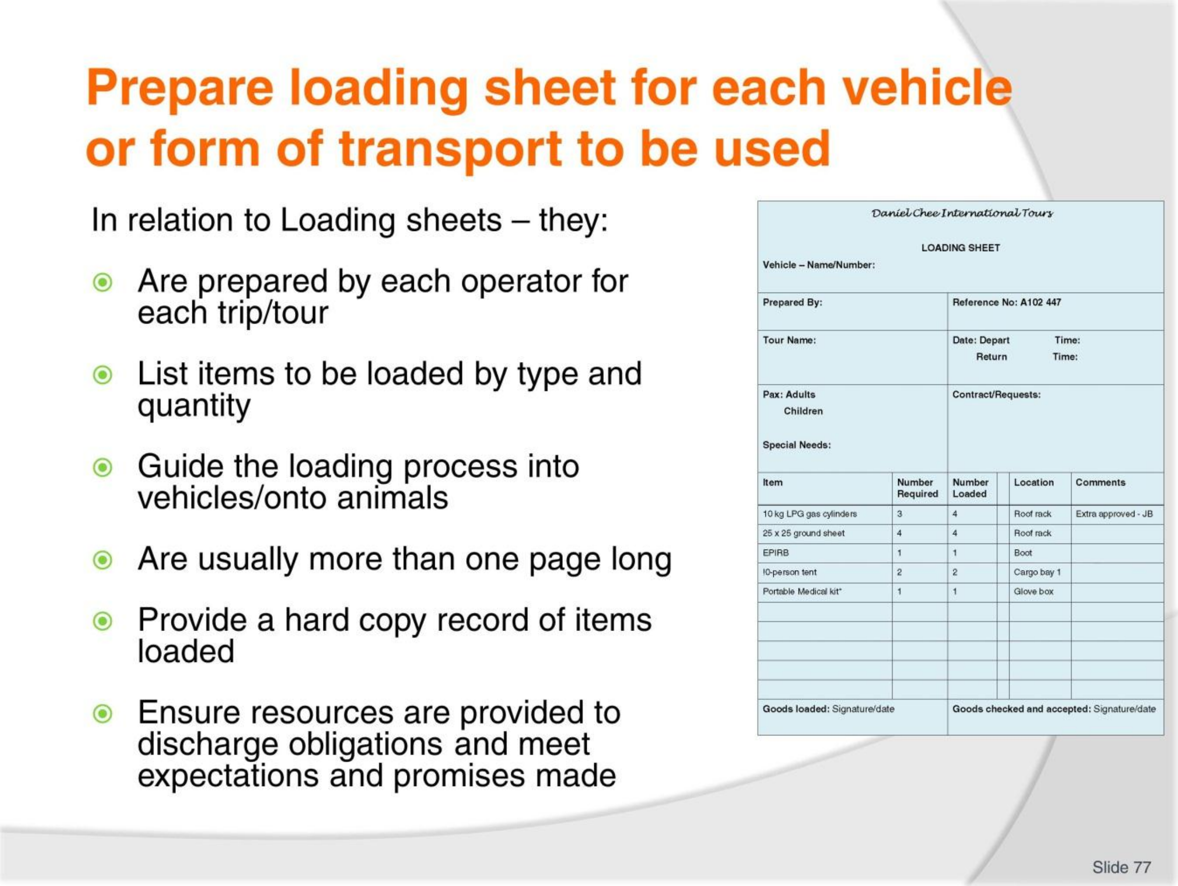


Slide No	Trainer Notes
76.	Trainer identifies for trainees the Performance Criteria for this Element, as listed on the slide. **Class Activity – General Discussion** Trainer leads a general class discussion by asking questions such as: • What is a loading sheet? • What detail/information is contained on a loading sheet? • What is involved in loading resources for a trip/tour?

Slide



Slide No	Trainer Notes

77.	Trainer states the following information gives a useful overview of the role of loading sheets – they:
	• Are prepared internally by each operator – a template document usually exists on a computer and it is:
	  ▪ Printed off as required
	  ▪ Filled in (often by-hand) for each trip tour
	• Are lists of equipment and supplies to be loaded onto individual vehicles on a tour-by-tour basis – identifying items by:
	  ▪ Type
	  ▪ Quantity
	• Are used to guide/govern actual loading of items into/onto vehicles or animals
	• Are usually multipage documents – that is, each loading sheet for each vehicle for each trip/tour often comprises two-plus sheets which are stapled together
	• Provide a record of items loaded for each trip/tour:
	  ▪ For record-keeping purposes
	  ▪ For calculating financial performance
	  ▪ For reference by tour staff

	• Form the basis for ensuring all trips/tours depart with all necessary materials and can fulfil all applicable promises and obligations and meet all tour party expectations.

Slide

Prepare loading sheet for each vehicle or form of transport to be used

Loading sheets may be prepared for:

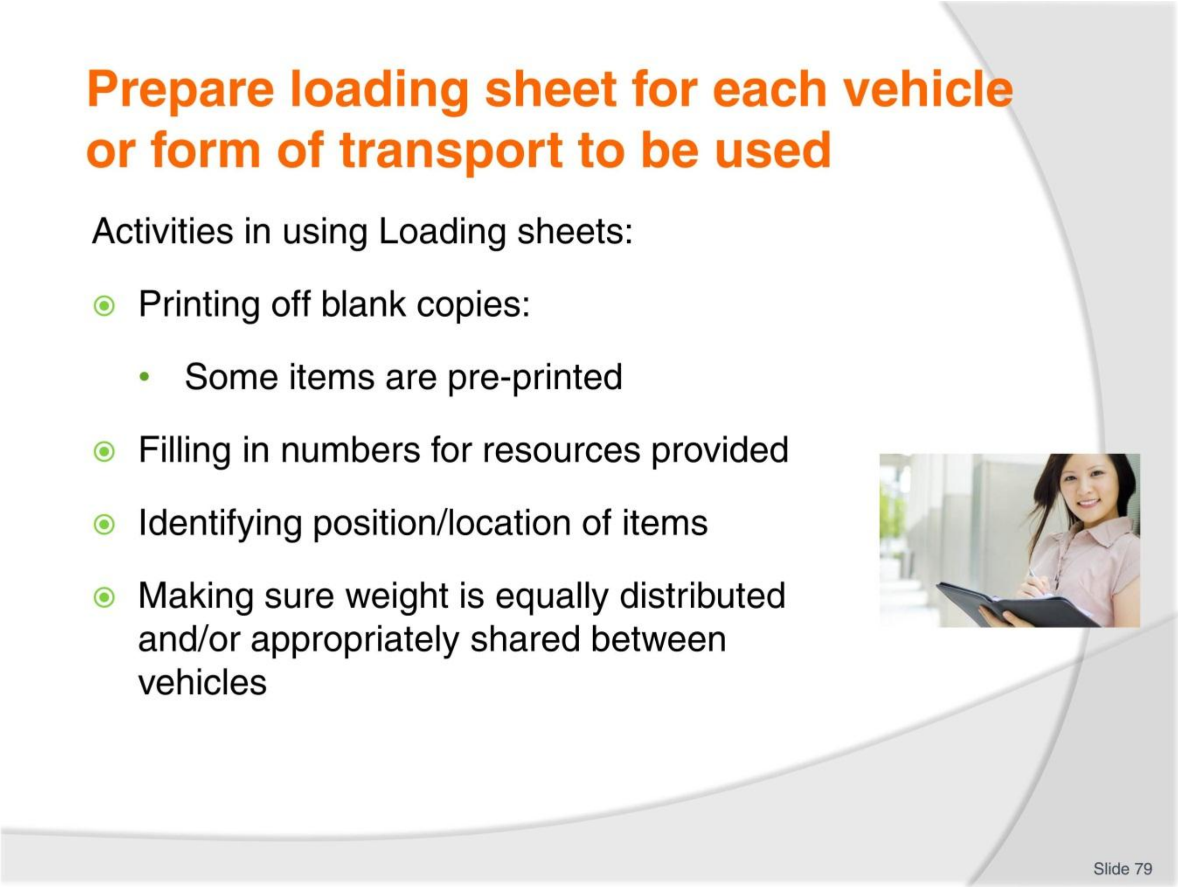
- Various company vehicles
- Third party vehicles
- Animals
- Support vehicles

Slide 78

Slide No	Trainer Notes

78.	Trainer advises Loading sheets may need to be prepared for:
	• Vehicles belonging to the tour organisation – most businesses will retain/use:
	  ▪ A bus/coach
	  ▪ A lorry
	  ▪ A van
	  ▪ A catering van/mobile kitchen
	  ▪ A variety of purpose-built trailers
	• Vehicles belonging to/hired from a third party carrier
	• Animals used for the trip tour
	• Other tour vehicles required to carry supplies.
	While many tours using animals and push-bikes and/or motor bikes are supplied by ‘support vehicles’ (and/or purchase/acquisitions *en route*) there can be a need to carry certain/identified ‘basic needs’ on them.

Slide



Slide No	Trainer Notes

79.	Trainer advises the basic activities in preparing loading sheets are:
	• Printing off blank copies of the *pro forma* list/s – and writing in the items for each trip as identified.
	  ▪ In some cases, the 'Number required' has been pre-entered by the system.
	• Writing in goods allocated for loading – under 'Number Loaded' column. This must include identifying items normally stowed on/in each vehicle (fire extinguishers, first aid kits, tools and spare parts) – these are still traditionally listed on loading sheets as:
	  ▪ There needs to be evidence they have been checked/provided
	  ▪ Tour staff know they have actually been supplied and checked
	  ▪ Checking them every time a tour is prepared provides an opportunity to:
	    – Verify their presence/existence – to make sure they have not been lost, stolen or used
	    – Inspect them for suitability, completeness, appearance and similar
	• Identifying where within each vehicle the equipment and supplies are located – this will assist:
	  ▪ Inspection, checking and verification of items
	  ▪ Tour staff when they need to access items – an effort is always made to stow/load the same things into the same locations for each trip/tour and on all vehicles, where possible

	• Undertaking calculations and deliberations to:
	  ▪ Distribute weight appropriately between and within vehicles – this is needed to:
	    – Adhere to maximum loading restrictions
	    – Optimise ride quality, safety, fuel consumption and passenger space
	  ▪ Share equipment and supplies between vehicles – to:
	    – Minimise loss in the event of an accident
	    – Speed up unpacking and re-packing when on tour.
	Classroom Activity – Handout
	Trainer distributes and discusses sample Loading sheet explaining its features and how it is completed and used.

Slide

Stow equipment and supplies

‘Stowing’ = loading.

Important considerations:

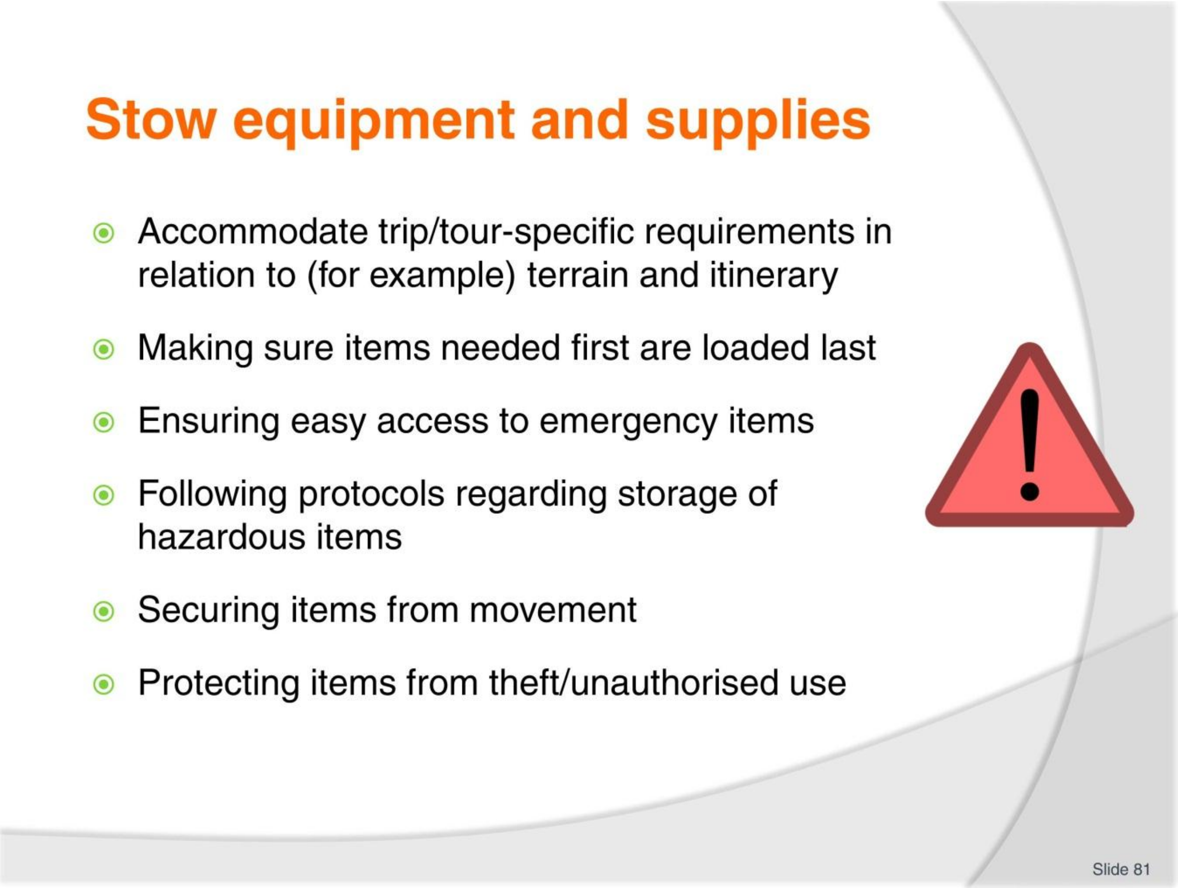
- Loading sheets MUST form the basis of actual loading
- Any variations MUST be recorded on the sheets
- Safe manual handling techniques must be used
- Weight restrictions to vehicles MUST be observed

(Continued)

Slide 80

Slide No	Trainer Notes
80.	Trainer explains ‘Stowing’ is another word/term for loading and both words/terms refer to the physical loading of equipment and supplies into or onto each vehicle or method of transport to be used for trips/tours highlighting important considerations when stowing equipment and supplies include: • Prepared loading sheets must form the basis for actual loading – the planning and calculations which went into their development/creation must give the central direction for: ▪ Which vehicle items are loaded onto ▪ Where in each vehicle the items are located. – Any changes made must be reflected on the loading sheet – that is, the loading sheet MUST be amended to show *actual* loading • Complying with approved manual handling techniques – in terms of: ▪ Safe lifting and carrying ▪ Use of team lifts and/or mechanical devices to help move/carry items • Complying with weight restrictions – in terms of: ▪ Weight limits for animals as advised by Codes of Practice or reference authorities ▪ Legislated and/or manufacturer specifications for vehicles.

Slide



Slide No	Trainer Notes

81.	Trainer continues giving important considerations when loading tour vehicles:
	• Taking into account tour-specific requirements – these commonly refer to:
	  ▪ The terrain to be covered – which can impact/influence:
	    – The capacity of the vehicle (or animal) to handle the load
	    – The potential for items to shift during transit
	  ▪ The itinerary – which will indicate:
	    – When certain items will need to be accessed
	    – The sequence in which some items will need to be accessed
	  ▪ Special needs and/or special requests which apply to the tour group
	  ▪ Items available from other providers (attractions, venues, destinations) during the trip/tour
	• Enabling ready access to certain equipment and items – for example:
	  ▪ Items that will be required first are often loaded last
	  ▪ Items needed for emergencies are always stowed enabling easy access in the event of an emergency

	• Following legislated and/or host enterprise procedures for the stowing of hazardous items such as: ▪ Sharp tools or equipment; Heavy items; Items made of or containing glass; Gas containers; Heat-sensitive aerosols; Medication; Petrol, fuel and other flammable materials • Securing equipment and supplies – in order to: ▪ Prevent movement, as far as practicable ▪ Stop unauthorised access including theft by others and unauthorised use by tour group members.

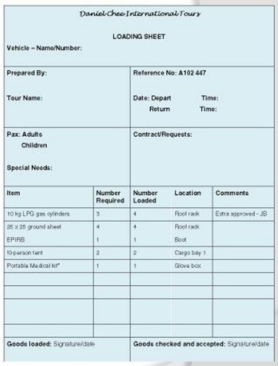
Slide

Use checklist/s to ensure all equipment and supplies are loaded

'Loading sheets' are the checklists used to ensure equipment and supplies are loaded – checking involves:

- Meeting with tour staff to conduct the check
- Photocopying completed Loading sheets and giving copy to tour staff
- Handling last-minute requirements

(Continued)



Daniel Chee International Tours

LOADING SHEET

Vehicle – Name/Number:

Prepared By:	**Reference No: A102 447**
Tour Name:	**Date: Depart Time:** **Return Time:**
Pax: Adults **Children** **Special Needs:**	**Contract/Requests:**

Item	Number Required	Number Loaded	Location	Comments
10 kg LPG gas cylinders	3	4	Roof rack	Extra approved - JB
25 x 25 ground sheet	4	4	Roof rack	
EPIRB	1	1	Boot	
10-person tent	2	2	Cargo bay 1	
Portable Medical kit*	1	1	Glove box	

Goods loaded: Signature/date | **Goods checked and accepted:** Signature/date

Slide 82

Slide No	Trainer Notes
82.	Trainer notes that commonly the Loading sheets are the checklists used to confirm all equipment and supplies have been loaded for trips and tours and the checking process comprises the following: • Meeting with tour staff to conduct the check – points to note are: ▪ This meeting/activity has to be organised – it needs to be scheduled and not just left to chance, or overlooked ▪ Sufficient time must be allocated – it is a time-consuming process ▪ Not all tour staff need to be present at this meeting but there must be at least one tour staff member in attendance to see where things are, to be informed of necessary information and to make input • Photocopying loading sheets completed as part of the loading process – so the tour staff member has their own copy • Handling any last-minute requirements – and ensuring these are authorised and documented as appropriate.

Slide

Use checklist/s to ensure all equipment and supplies are loaded

- Verifying/inspecting items
- Adjusting Loading sheets as/if required – to reflect changes
- Signing-off and dating the sheets

Slide 83

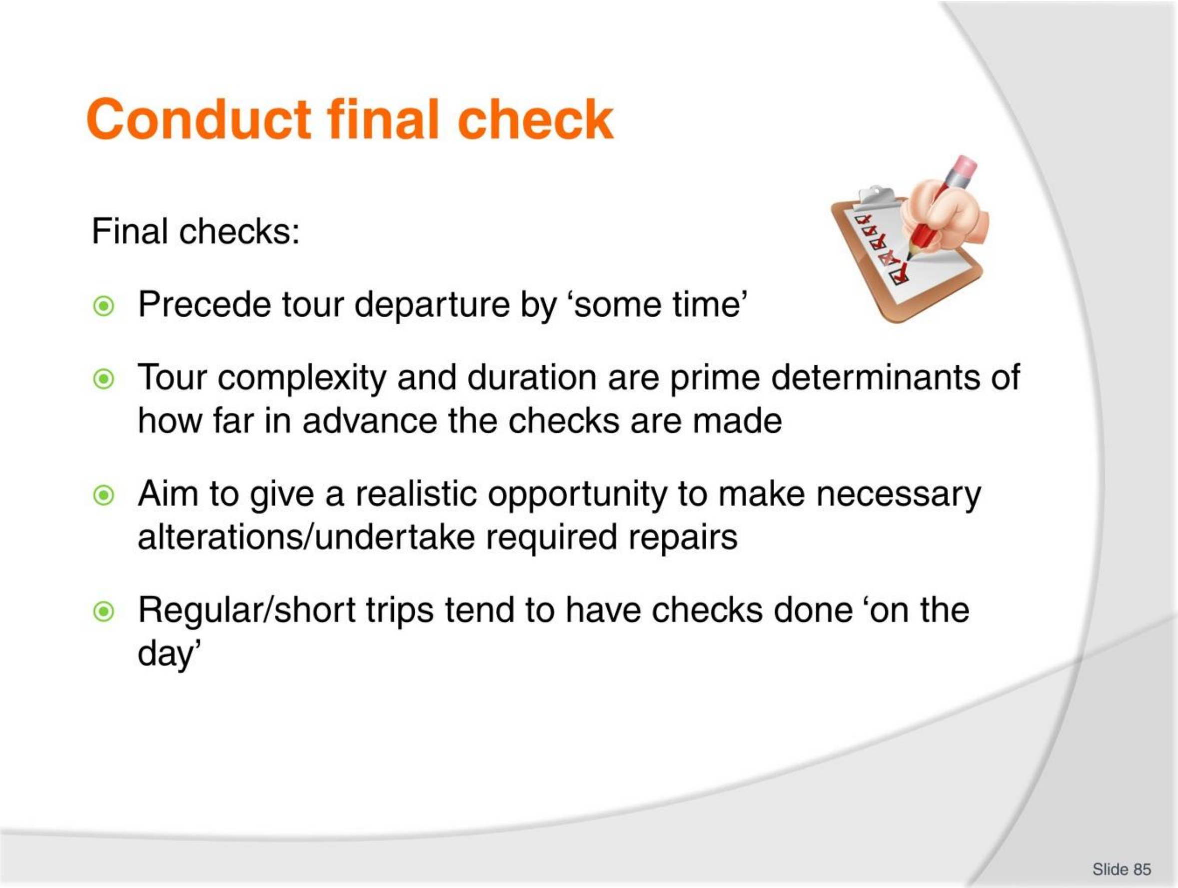
Slide No	Trainer Notes
83.	Trainer continues describing use of Loading sheets as checklists: • Verifying/inspecting items as necessary/appropriate to the nature of each item – for example: ▪ Gas cylinders are within their legislated testing dates required for pressure vessels ▪ EPIRBs are registered correctly and are still in date ▪ Vehicle registration is current ▪ Foods are within required Use By dates ▪ There is no obvious/unacceptable damage or defects to goods • Adjusting the loading sheets – as/if required in accordance with actual loading and/or decisions made. This involves: ▪ Amending/entering figures in the Number Loaded column ▪ Adding written comment in the Comments column • Signing-off and dating the loading sheets – the loading sheet needs to be signed: ▪ By the person/s who loaded the vehicle

	▪ By the tour staff member who participated in the checking process – their signature indicates: – All items were provided as indicated in good condition – They are taking responsibility for the items listed.

Slide

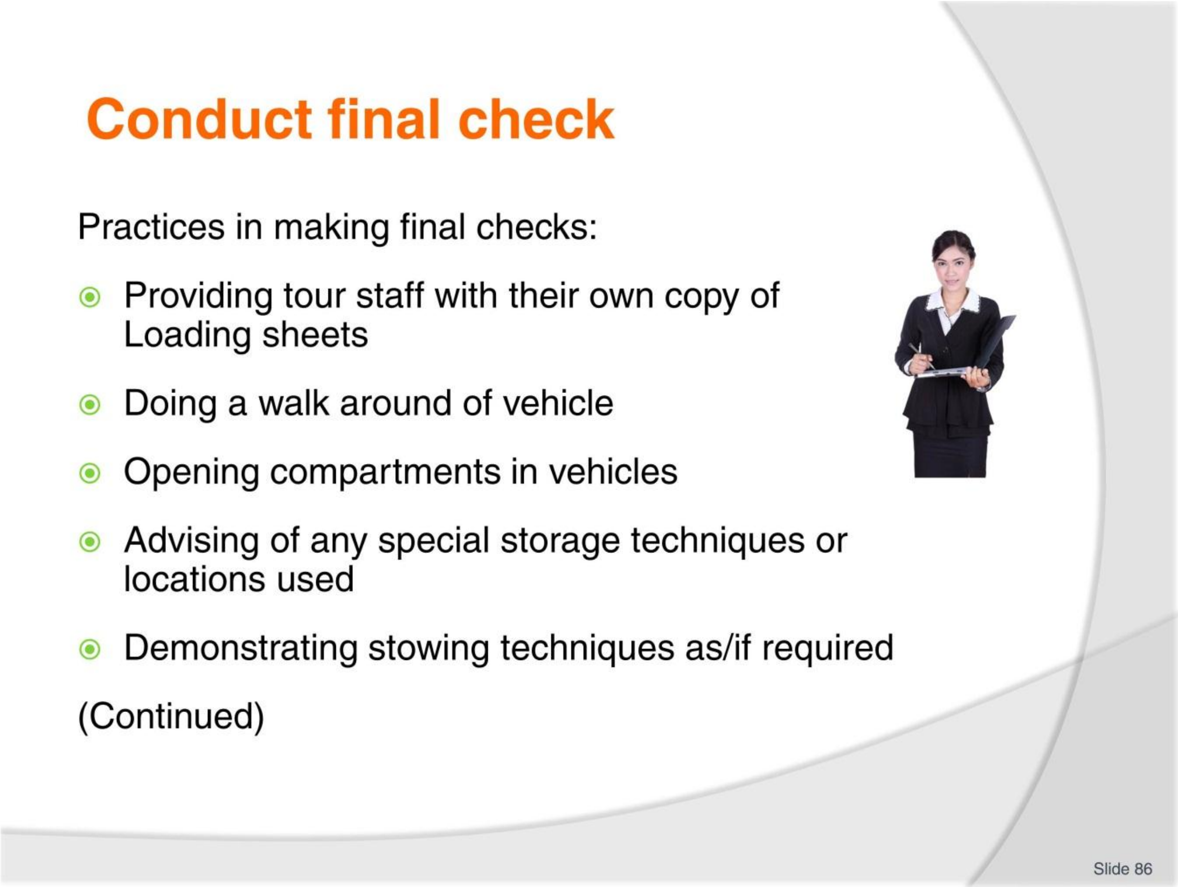
Slide No	Trainer Notes
84.	Trainer notes: • In some cases loading and stowing of the equipment and supplies takes place **at the same time** as the checks are made to ensure all items have been packed. ▪ In these cases: – Tour staff help load and stow the items – Tour staff decide where they want supplies and equipment to be located – Loading sheets are signed-off when the process of packing/loading has been completed.

Slide



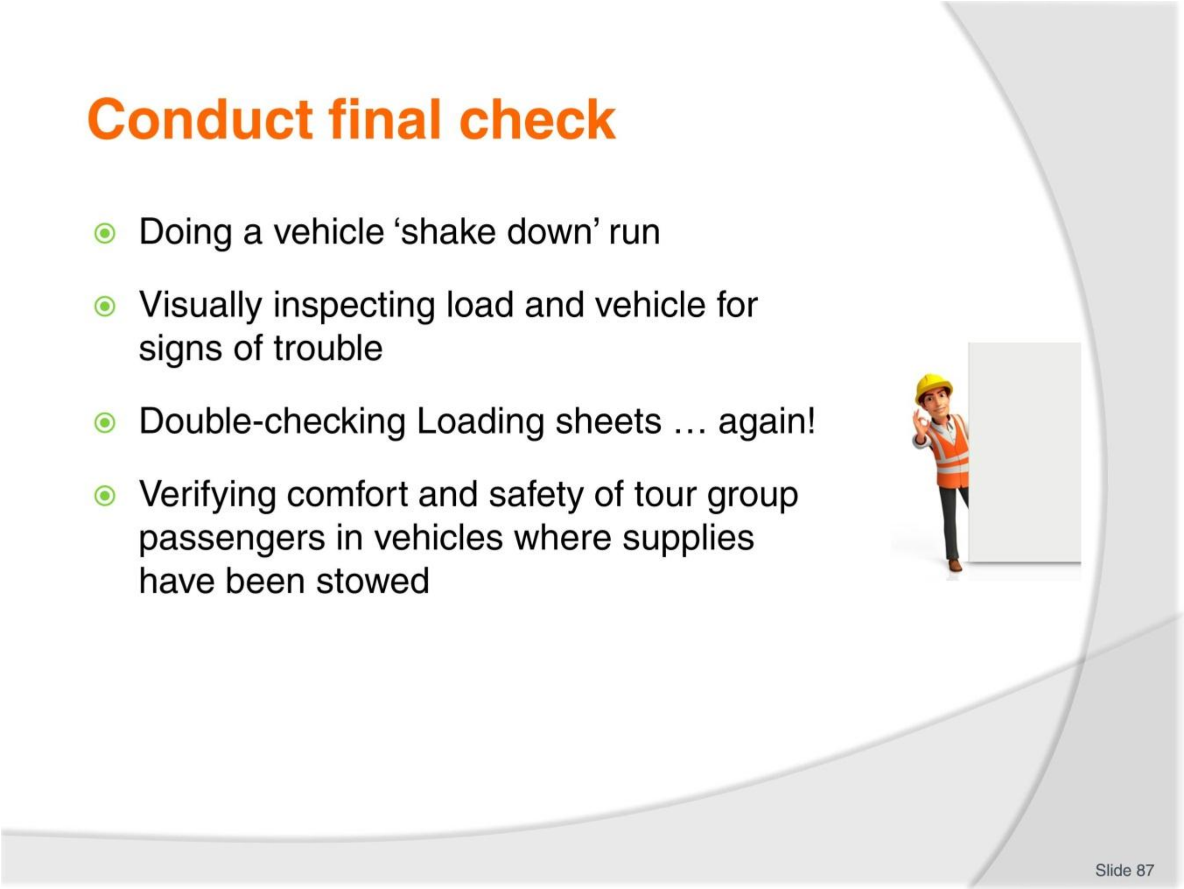
Slide No	Trainer Notes
85.	Trainer states the final check usually precedes trip/tour departure by ‘some time’ explaining: • Exactly what is ‘some time’ varies between trips • Trips/tours which are longer duration, custom or private and involving greater numbers, more complexity and higher vehicle numbers are traditionally conducted ‘earlier’ – such as a day or more in advance • Final checks for these trips/tours take place at this time to give a realistic time frame to make any adjustments (re-packing/re-loading) or repairs which may be needed • Regular, shorter trips/tours tend to have final checks undertaken ‘on the day’ or within 24 hours of departure • A shorter lead time for these checks is used because: ▪ The vehicles usually need to be kept in service/available for use ▪ Issues arising are usually less problematic and more readily addressed ▪ There is less equipment to be checked – or re-loaded to another vehicle if necessary.

Slide



Slide No	Trainer Notes
86.	Trainer presents practices used to complete final checking can include: • Providing all tour staff with their own copy of the loading sheets – for their personal reference • Familiarising tour staff with location of equipment and supplies within individual vehicles – by: ▪ Conducting a 'walk-around' of the vehicle ▪ Opening compartments and physically showing/indicating where individual items have been stowed (with reference to their location on the loading sheets) • Notifying staff in relation to special precautions that have been taken – which may include: ▪ Advising of storage of traditional items which have been stowed in other than usual locations ▪ Explaining use of (and reasons) special packaging and storing materials and/or techniques which may have been applied ▪ Demonstrating packaging and storing techniques so staff can duplicate them *en route.*

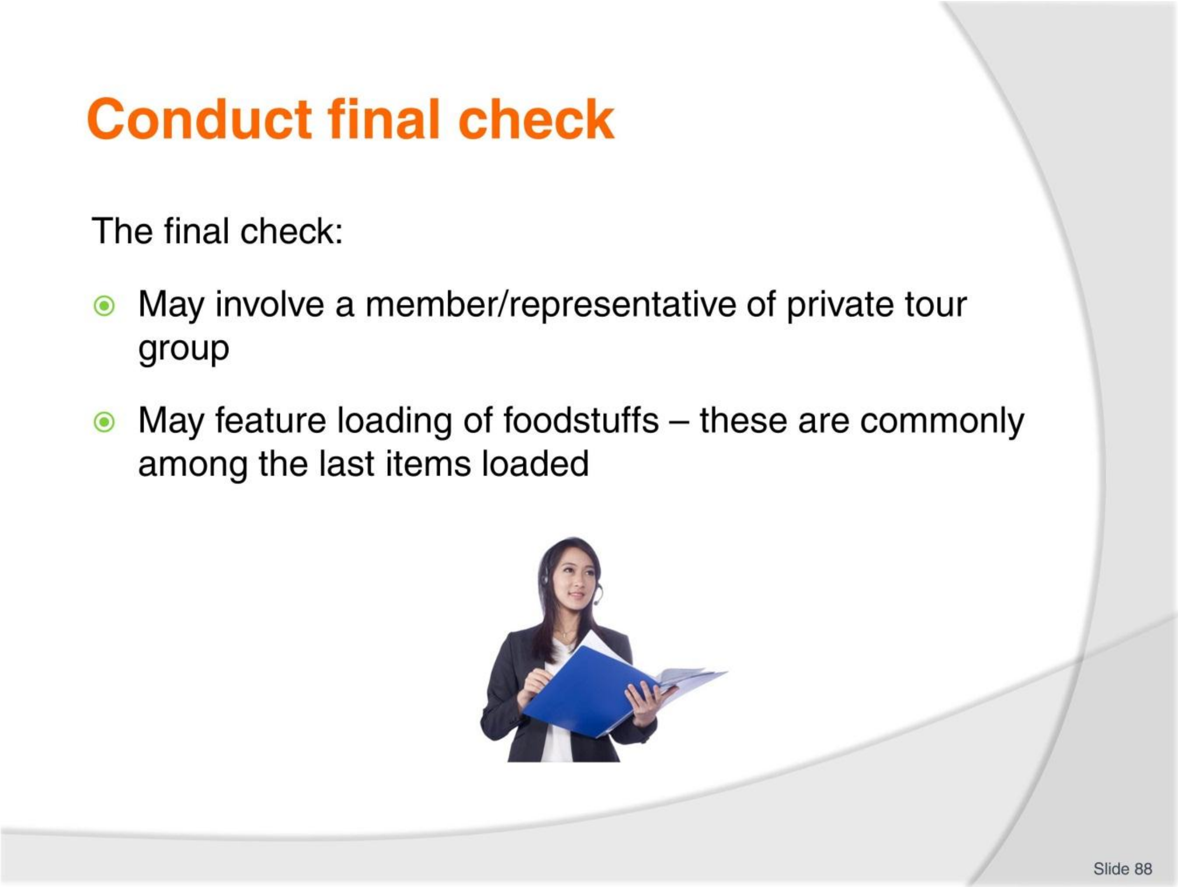
Slide



Slide No	Trainer Notes

87.	Trainer continues presenting practices used to complete final checking:
	• Taking vehicle for a shake-down run – this is often done to:
	  ▪ Settle items in position – so:
	    – They do not rattle when customers first board
	    – They can be further secured prior to tour departure
	  ▪ Verify:
	    – Impact of load (in terms of weight and balance) on behaviour, handling and performance
	    – Overall vehicle operational status
	  ▪ Trigger indications there are problems – with load or vehicle: see immediately below
	• Visually inspecting the load and the vehicles for problem signs – such as:
	  ▪ Leakages from supplies as a result of the shake-down run, or due to faulty containers or packaging
	  ▪ Leakages from the vehicle – such as water, fuel, other fluids
	  ▪ Protrusions outside the acceptable dimensions of the vehicle
	• Double-checking Loading sheets have been completed as required – and all required equipment and supplies have been loaded
	• Ensuring comfort and safety for those who may be travelling in vehicles that have been packed with equipment and supplies.

Slide



<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>88.</td><td>
Trainer notes in some cases, the final check:

May include a representative of a private tour party – where this has been requested or negotiated
May feature loading of certain foodstuffs – such as:

Pre-prepared hot food and/or beverages (including hot water for tea, coffees) – which is to be maintained ‘hot’ so it can be served hot
Refrigerated and frozen foods – which have been held in commercial fridges and freezers and will be loaded into portable refrigeration and/or freezer units.

Classroom Activity – Excursion
Trainer organises an excursion to a suitable operator so students can:

Talk to management and employees
View facilities
Learn how staff determine and prepare individual tour requirements
Observe pre-departure checks and practices undertaken by employees and tour staff
Watch loading activities
Obtain sample documentation relating to trips/tours.

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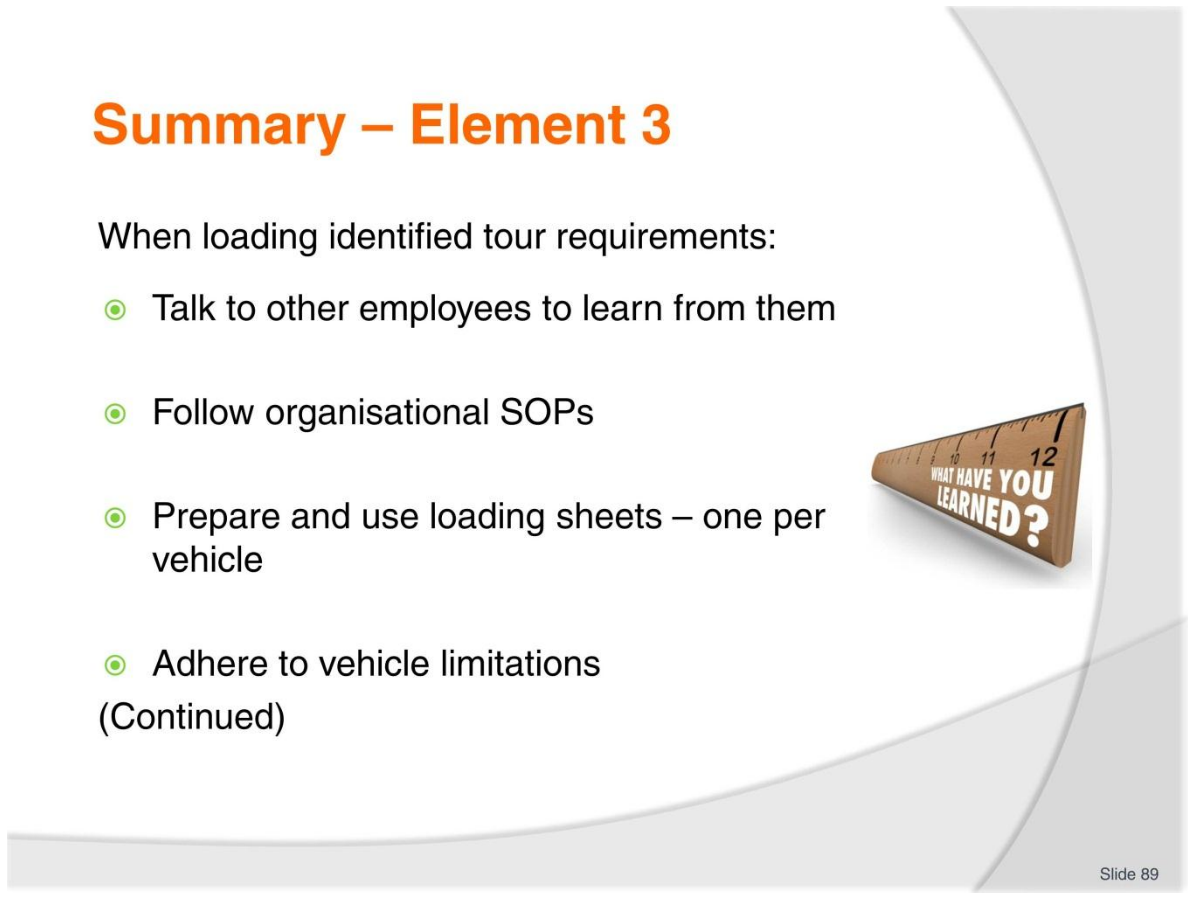
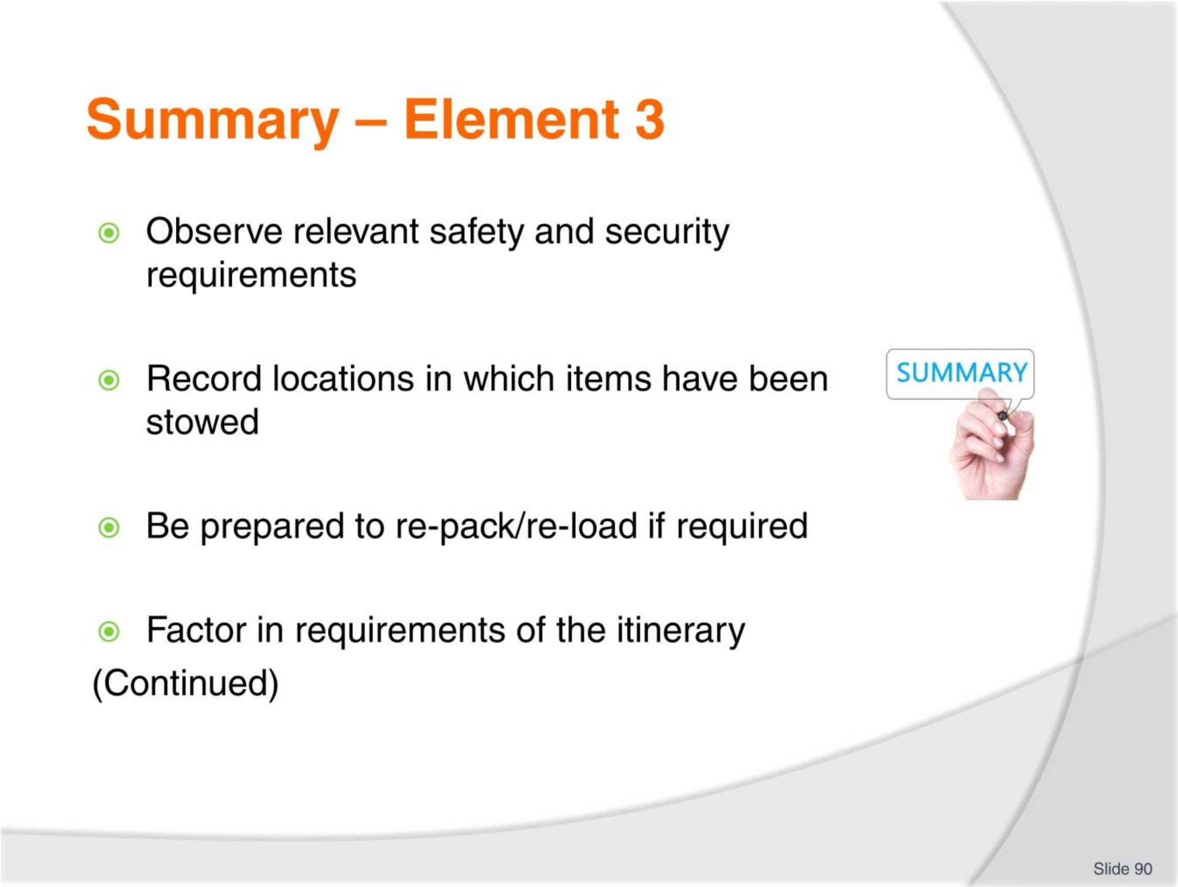


Slide No	Trainer Notes
89.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

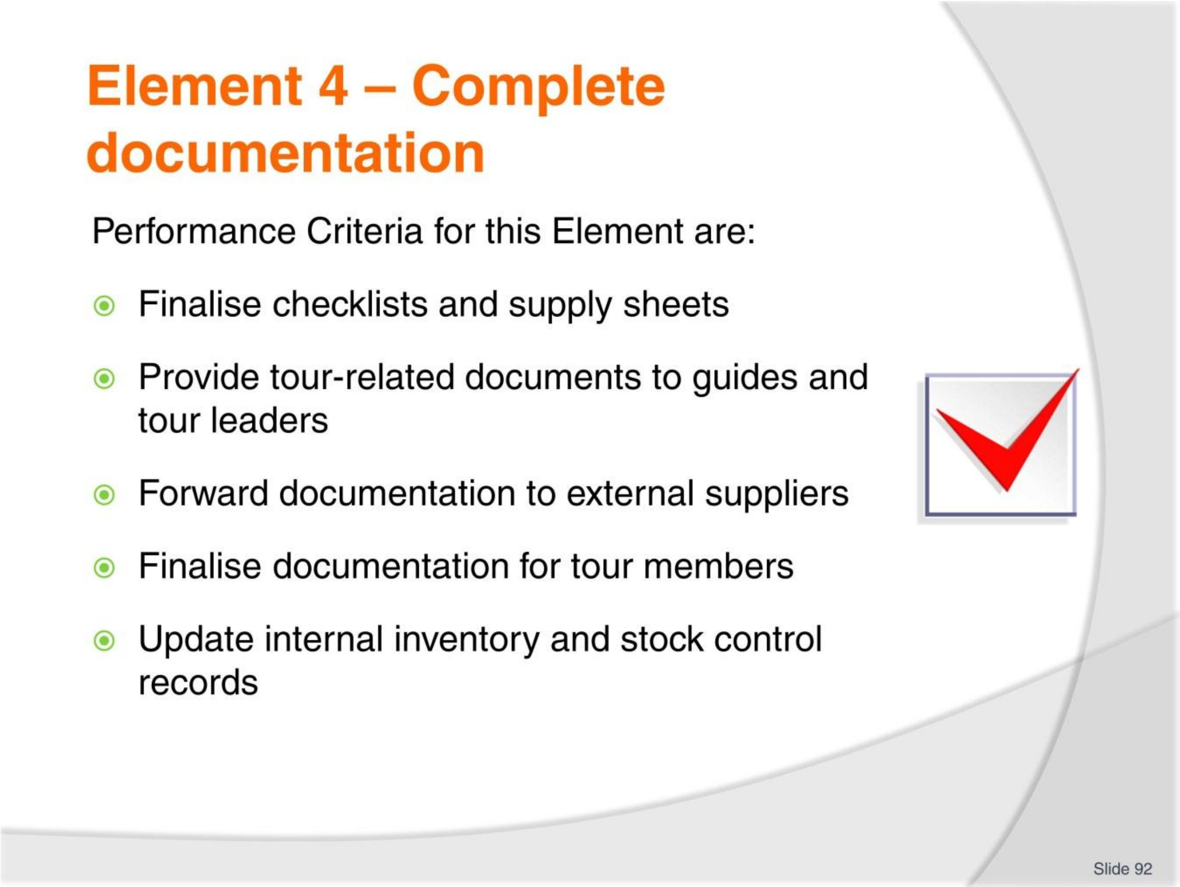


Slide No	Trainer Notes
90.	Trainer provides a recap of the Element asking questions to check trainee understanding and responding to questions from trainees, as required.

Slide

Slide No	Trainer Notes
91.	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
92.	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 documentation needs to be completed? • Who completes it? • Why does it need to be completed? • When must it be completed? • Why is it important/necessary to complete this documentation and do so accurately and promptly?

Slide

Slide No	Trainer Notes
93.	Trainer advises checklists/supply lists and other documents which may need finalising include: • Loading sheets – these are the primary documents • Requisition sheets • Internal stock transfer sheets • Passenger sheets/manifests • Supply lists. **Classroom Activity – Handouts** Trainer distributes and discusses sample documents identified on slide.

Slide


Slide No	Trainer Notes

94.	Trainer continues identifying checklists/supply lists and other documents which may need finalising include:
	• Inspection checklists
	• Internal advice sheets
	• Catering advice sheets
	• One-off notifications from management:
	  ▪ Authorising extra allocation of physical resources
	  ▪ Allowing more funding to be granted
	  ▪ Noting agreed changes to SOPs.
	Classroom Activity – Handouts
	Trainer distributes and discusses sample documents identified on slide.

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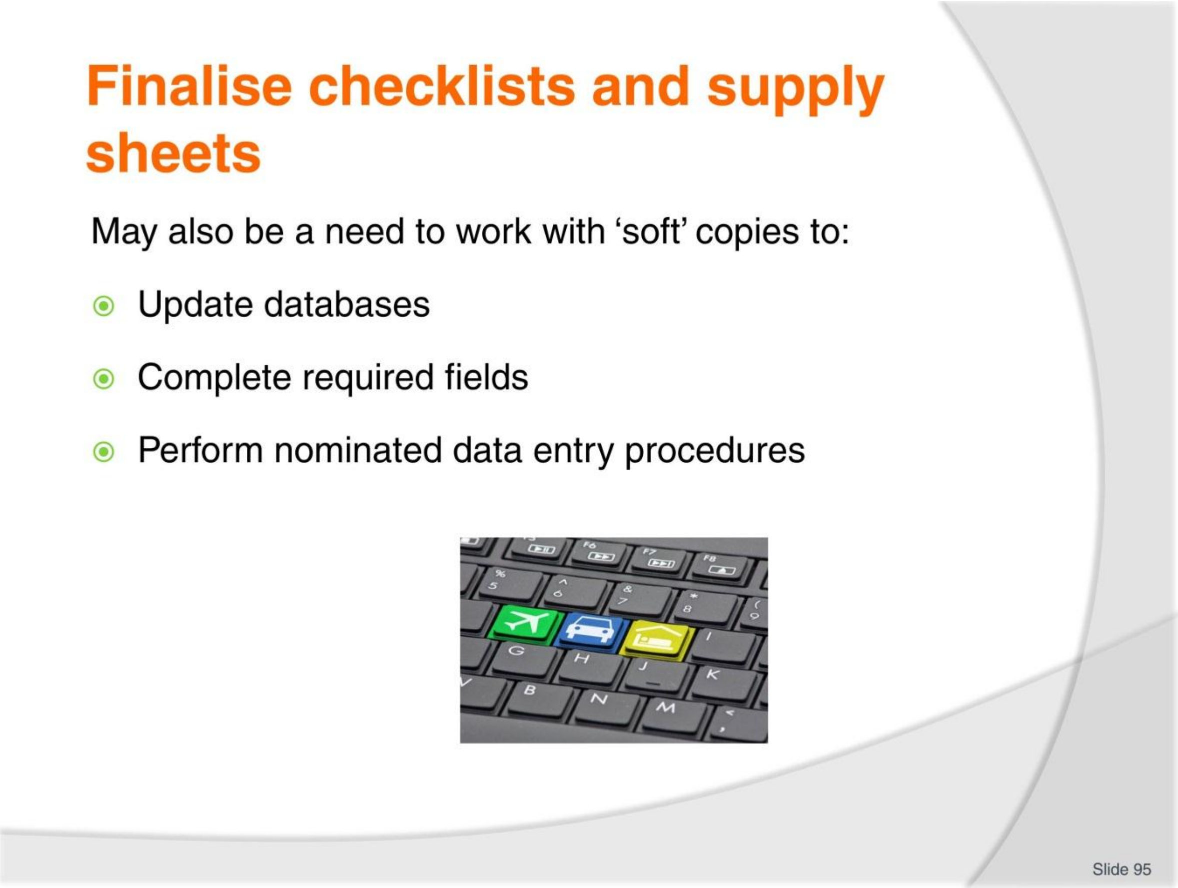
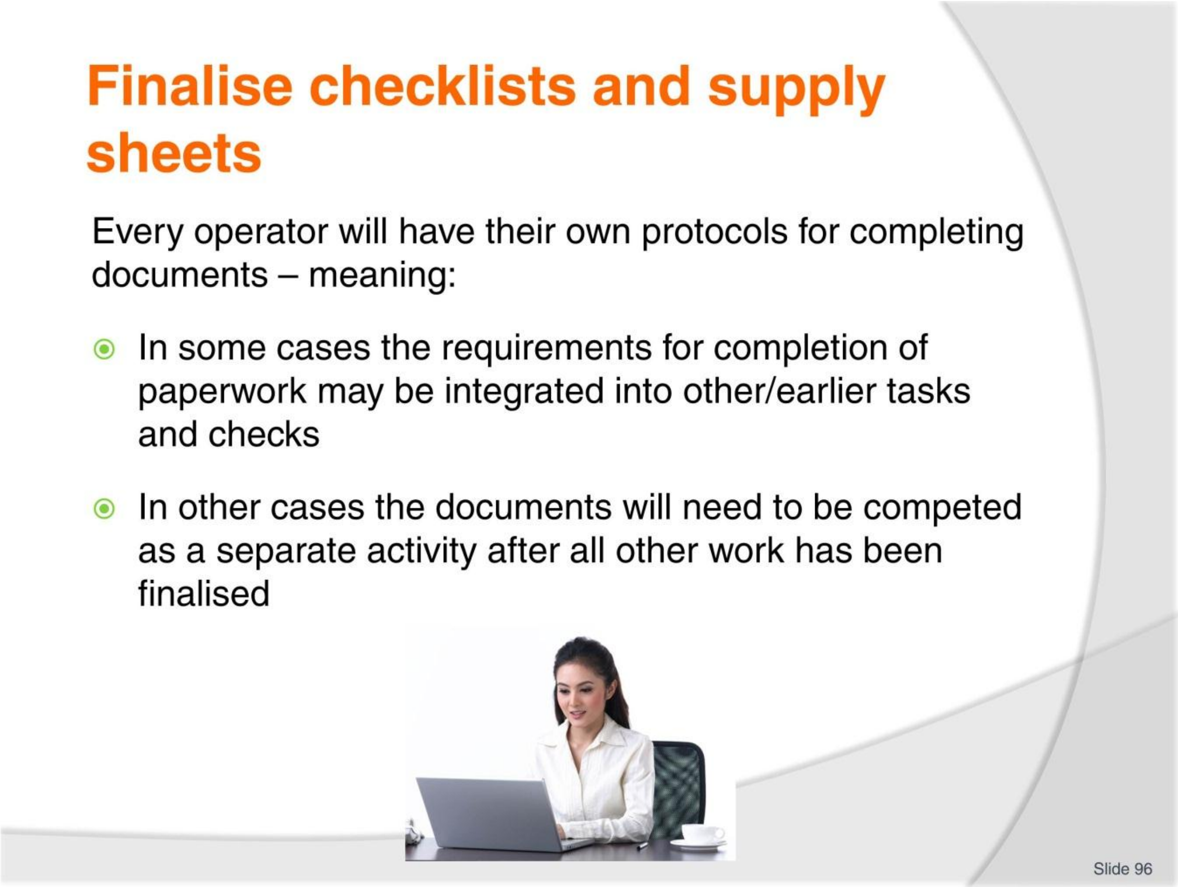


Slide No	Trainer Notes
95.	Trainer also states there can also be a need to: • Update databases • Complete relevant/required fields • Perform nominated data entry procedures.

Slide



<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>96.</td><td>Trainer indicates it is important to understand every operator will have their own unique protocols for completing internal paperwork and checklists which means:

In some cases for certain businesses (or trips/tours) some of the steps identified below will have been undertaken as part of other activities – as already described in earlier notes
In other cases for other businesses (or trips/tours) some of the steps listed below will take place as a separate activity after all other tasks have been finished – often because:

There was insufficient time available to do so at the time
There was insufficient information to make the correct decision about how completion of the document should occur.

</td></tr>
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Slide

Finalise checklists and supply sheets

Possible tasks at this stage may include:

- Obtaining signatures
- Photocopying Loading sheets
- Adding required information
- Inserting 'missing' facts and figures

(Continued)

Slide 97

Slide No	Trainer Notes
97.	Trainer identifies tasks which may need to be undertaken can include: • Obtaining signatures from tour guides and tour leaders – to acknowledge receipt of the equipment and supplies • Photocopying loading sheets – so one copy per staff member can be distributed at the pre-tour briefing to tour guides, leaders, drivers • Dating and adding specific tour group information to the sheets – as specific to each trip/tour • Adding missing facts and figures – not previously provided/identified.

Slide


Slide No	Trainer Notes
98.	Trainer continues identifies tasks which may need to be undertaken can include: • Entering cost prices of items – from a nominated source, catalogue, internal database or invoice • Performing basic arithmetic calculations – such as: ▪ Extensions – by multiplying numbers provided by cost prices ▪ Totalling various items/columns • Forwarding completed documents – for further internal processing • Filing – for future reference.

Slide

Provide tour-related documents to guides and tour leaders

Documents may include:

- Loading sheets
- Manufacturer’s instructions
- Repair manuals
- Warranties and guarantees
- Copies of SOPs

(Continued)

Slide 99

Slide No	Trainer Notes
99.	Trainer notes documents which may need to be provided will need to reflect the needs and nature of the individual trip/tour and may involve: • Loading sheets • Manufacturer’s instructions – as appropriate for equipment loaded • Repair manuals – for vehicles and equipment • Warranties and guarantees – relating to new items purchased and provided for the tour so staff can use/rely on these if there is breakdown/problem • Copies of standard operating procedures – for reference purposes to guide on-tour actions and responses to certain situations by staff. **Classroom Activity – Handouts** Trainer distributes and discusses sample documentation as identified on the slide.

Slide

Provide tour-related documents to guides and tour leaders

- Standard response plans
- Contingency plans
- EMPs
- Itineraries – passenger and operational
- Maps
- Passenger lists

(Continued)

Slide 100

Slide No	Trainer Notes
100.	Trainer continues identifying documents which may need to be provided: • Standard (and/or modified as required for the individual trip/tour) response plans – for reference as/if needed: • Contingency plans • Emergency Management Plans • Itineraries – including: ▪ Tour itinerary as provided to tour group – so staff are fully aware of what participants have been told about the trip/tour and know what they expect ▪ Operational itinerary – as described previously • Maps – for the regions, areas and countries to be visited • Passenger lists – detailing names and details of tour group party: this is not applicable to all tours. **Classroom Activity – Handouts** Trainer distributes and discusses sample documentation as identified on the slide.

Slide

Provide tour-related documents to guides and tour leaders

- Rooming lists
- Passenger profiles
- Details of special requests
- Handout material for tour group members
- Tour brief
- Catering-related information

Slide 101

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>101.</td><td>
Trainer continues identifying documents which may need to be provided:

Rooming lists – where overnight accommodation has been arranged/booked
Passenger profiles – to give tour staff context for the trip/tour and indicate what they might expect from participants
Details of special requests – in term of:

Contracted requests – which must be met
Refused requests – which were asked for but customers have been told these requests cannot be met
Communicating known information about special requests which have been raised by members of the tour group

Handout material – this can include:

Leaflets/information for distribution at nominated locations, sites and interpretive activities; General safety information; Tour information kits; Tour maps; Merchandise

Tour brief – which may comprise sub-sets of a variety of information as appropriate to the nature and destinations for the trip/tour such as:

Safety updates; Terrorist alerts; Weather conditions; Road conditions; Updates/alerts received from carriers and/or third party providers; Advice about known and/or possible impediments to the planned or standard conduct/operation of the trip/tour

</td></tr>
</table>

	• Catering information – which can include: ▪ Meal schedules; Standard recipes; Food safety protocols. **Classroom Activity – Handouts** Trainer distributes and discusses sample documentation as identified on the slide.

Slide

Slide No	Trainer Notes

102.	Trainer advises practices for distributing documentation will vary between operators depending on nature of the trip/tour and can involve:
	• Posting of relevant details on staff notice board
	• Electronic communication of relevant details to tour staff – in terms of using:
	  ▪ Emails; Text messages
	• Face-to-face meetings – known as 'pre-departure briefings' these:
	  ▪ Can vary significantly in length from a couple of minutes for short trips/tours to *several hours* for longer direction events
	  ▪ May incorporate other activities – such as last-minute training, vehicle inspection and familiarisation, checking and verification of the loading sheets
	  ▪ Always include a Q&A session where tour staff are encouraged to raise any issues of concern to them regarding the upcoming trip/tour
	  ▪ Incorporate hand-over of (and where necessary, signing for) items – such as:
	    – Vehicle keys; Money and non-cash payment documentation; Merchandise; Cell phones; Portable radios
	• Distribution of hard copy materials – and there may also be reference to where/how these can also be sourced electronically if needed while on tour.

Slide

<table>
<tr><th>Slide No</th><th>Trainer Notes</th></tr>
<tr><td>103.</td><td>Trainer states in relation to this aspect of the job it is important to understand:
There is a non-negotiable need to honour any previously agreed arrangements – which may have been organised as part of the initial contact and subsequent negotiation process
There is often a need to make 'immediate' contact to make arrangements and place orders verbally – prior to the forwarding of supporting documentation (which may take an unacceptable amount of time to organise).</td></tr>
</table>

Slide

Forward documentation to external suppliers

There can be a need to:

- Confirm agreed arrangements
- Ensure Purchase Orders are raised
- Forward Purchase Orders

(Continued)

Slide 104

Slide No	Trainer Notes
104.	Trainer highlights in order to ensure the required products and services are made available by external suppliers, authorities and/or communities there can be a need to: • Confirm contractual and arrangements and similar agreements which have been agreed to – which may require forwarding of a copy of these to the suppliers • Ensure correct Purchase Orders are raised – and appropriately signed to authorise purchases • Ensure properly prepared Purchased Orders are sent to the appropriate suppliers – they may be forwarded: ▪ In hard copy form ▪ Electronically – via email using an 'Attachment' for the PO.

Slide

Forward documentation to external suppliers

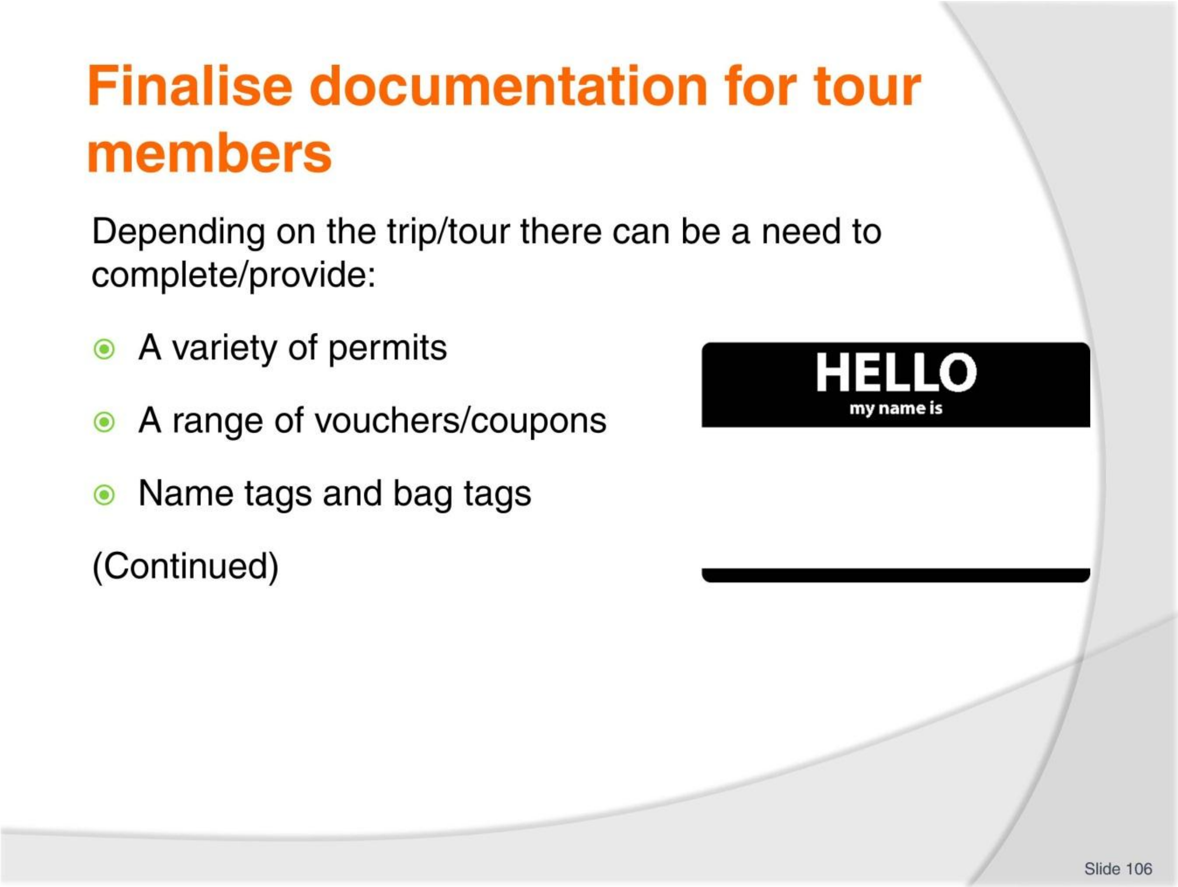
- Complete online Purchase Orders
- Provide additional information as necessary
- Ensure required authorisations and permits have been finalised
- Submit touring/travel plans

Slide 105

Slide No	Trainer Notes
105.	Trainer continues activities that may be required at this stage: • Complete an online PO as provided on the website of the provider: ▪ Using pre-approved Passwords/User Codes if/as necessary to buy on credit ▪ Paying online at the time of purchase using a debit/credit card ▪ Confirming payment will be made when goods/services are received by the trip/tour group • Provide additional information relevant to the actual purchase – as/if required, for example: ▪ Sending final details and confirmation regarding numbers and names of tour group members ▪ Providing room share arrangements to accommodation venues ▪ Advising catering suppliers of special food/diet needs • Ensure required authorisations and permits have been finalised – which will often require: ▪ Lodgement of a formal application on an official form ▪ Provision of nominated details/information ▪ Payment of a fee

	• Submit touring plans – where required to authorities and/or local communities in order to: ▪ Advise them of upcoming movement/events ▪ Seek permission/s ▪ Show respect ▪ Meet agreed Codes of Practice/Conduct.

Slide



Slide No	Trainer Notes
106.	Trainer states depending on the trip/tour there can be a need to finalise: • Permits – for: ▪ Vehicle access; Entry to certain areas; Using nominated items; Legislated compliance purposes • Vouchers (also known as 'coupons') – for distribution to tour group members and tour staff so they can: ▪ Receive priority treatment – such as avoiding standard queues/waiting at attractions and destinations ▪ Exchange them for nominated good and services ▪ Swap them for 'Goods to the value of X'. There is a need to check/verify: ▪ All required activities are covered ▪ Sufficient numbers are provided to cater for identified/expected numbers ▪ Reference numbers of coupons are recorded against each trip/tour for costing and reconciliation purposes • Name tags – these may be hand-written of pre-printed. Attention needs to be paid to: ▪ Ensuring all known tour members have a tag

	▪ All types/version of tags are provided – some trips/tours issue more than one name tag such as: – For wearing on clothes/the person – For attachment to luggage – known as ‘baggage tags’ (or ‘bag tags’) ▪ Correct spelling ▪ Inclusion of required/appropriate honorifics – such as but not limited to: – Mr, Mrs, Ms or Miss; Dr; Professor; Father (for priests). **Classroom Activity – Handouts** Trainer distributes and discusses items listed on slide.

Slide

Slide No	Trainer Notes
107.	Trainer continues identifying items which may need to be finalised: • Standard tour-related Informational material – which can include: ▪ Passenger itinerary; Terms and conditions of tour; Advice regarding the destinations, dangers and details of the tour; Expectations in regard to behaviour while on tour; Copies of relevant Codes of Conduct; Advice regarding the authority of the tour guide and the tour leaders while on tour • Organisational merchandise and other tour/trip-related items – which can include: ▪ Hats/caps; Travel bags; Discount coupons for future tours; Feedback forms/Customer Comment cards; Special items where 'Children' are known to be touring – such as colouring books and pencils, reading materials, range of toys; Special items where 'Infants' are known to be touring – such as bibs and booties or other items (some of which may have been received FOC from third party suppliers of infant formula or clothes).

Slide

Finalise documentation for tour members

Distribution of finalised tour member documents may occur in several ways:

- Loading onto tour vehicles
- Placing items into packs and putting in designated locations for tour staff to collect
- Handing items personally to tour staff
- Distributing items direct/face-to-face to tour members
- Forwarding items to tour members prior to departure date

Slide 108

Slide No	Trainer Notes
108.	Trainer observes several variations are possible in relation to the distribution of documents and items when they have been finalised and requirements can vary not only between individual operators but also within organisations depending on tour types. Actions required can include: • Loading of items onto the tour vehicle/s • Placing completed 'packs' (usually one per tour group member) in a designated location – for tour staff to collect when needed • Handing items over in-person to designated tour staff • Distributing the items to tour members – on arrival/as they board • Forwarding items to tour members (by mail, electronically, courier or by hand) prior to departure date.

Slide

Update internal inventory and stock control records

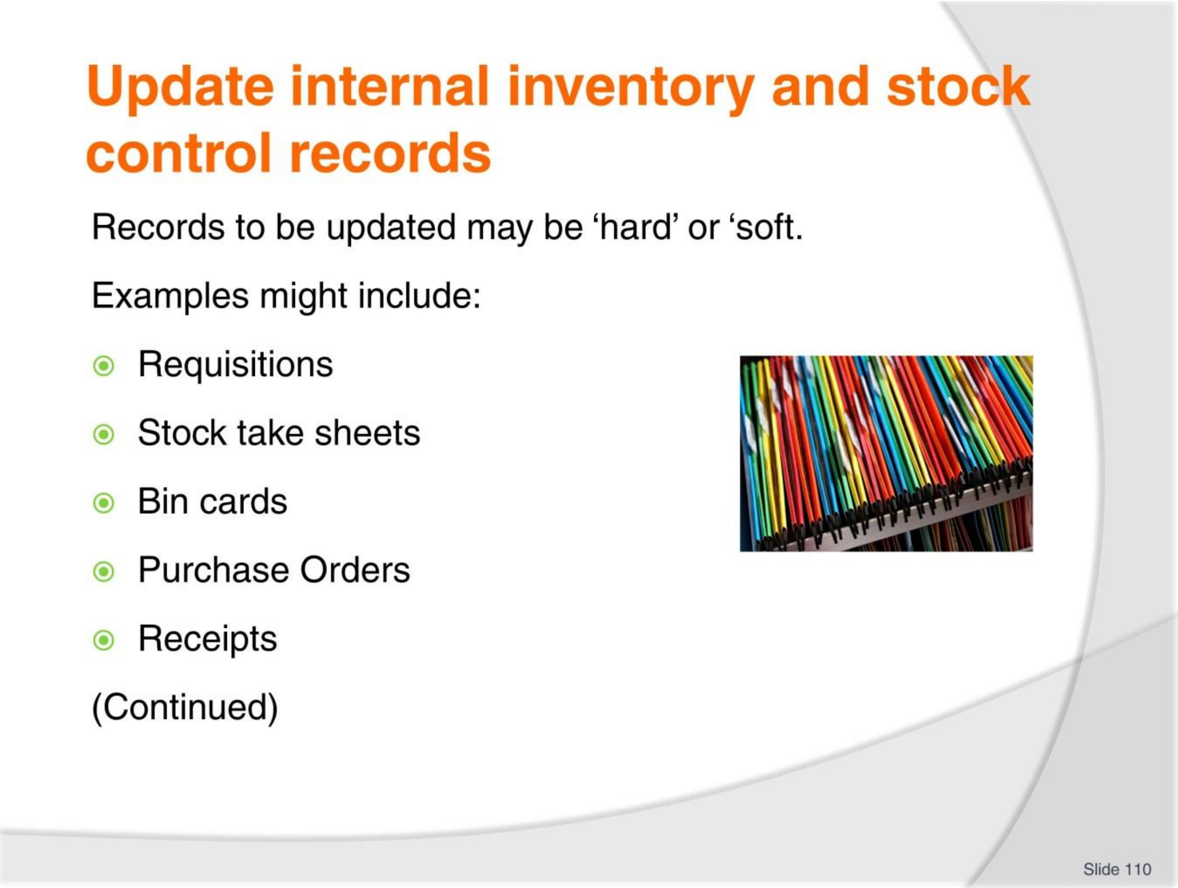
Reasons/need to update internal records:

- Manage size/value of inventory
- Ensure organisation does not run out of stock
- Facilitate stock management and control
- Assist stock rotation

Slide 109

Slide No	Trainer Notes
109.	Trainer instructs internal records of the organisation must be updated in order to: • Manage the size of the inventory – so: ▪ Value of stock does not exceed required monetary value prescribed by management ▪ Physical size/dimensions of stock do not exceed capacity for storing same • Ensure the organisation does not run out of stock – and required items are available when necessary • Facilitate stock management and control – which forms the basis of financial control and the calculation of statistics relating to financial performance of each trip/tour. This is essential to ensure the ongoing viability of the business and indicate, for example: ▪ Unprofitable trips/tours which need to be removed ▪ Need for the price of tickets to rise ▪ Areas of the trip/tour which need attention • Help ensure stock is rotated correctly – generally applying the FIFO approach to stock usage.

Slide



Slide No	Trainer Notes
110.	Trainer identifies relevant documents noting the records which may need to be updated (or forwarded to administration/management) can include: • Requisitions – used to order stock from internal stores for each trip/tour • Stock take sheets – used to record stock counts • Bin cards – used to control individual stock items at their unique locations in the store room • Purchase orders – used to authorise purchases from external suppliers • Receipts – required to demonstrate money has been paid, and/or has been spent on the items listed. **Classroom Activity – Handouts** Trainer distributes and discusses sample documents/records as identified on the slide.

Slide

Slide No	Trainer Notes
111.	Trainer continues identifying internal records which might require updating: • Supplier-related documentation – such as: ▪ Delivery dockets and Invoices – documents which accompany deliveries from third party providers ▪ Statements – which are (generally) monthly documents from individual suppliers providing an overview of transaction with them for the period and listing the amount they are owed ▪ Credit notes – detailing money owed to the organisation as a result of returning goods, refunds, or over-charges. • Damaged goods sheets – identifying: ▪ Goods which have been removed from inventory by type and quantity ▪ What has happened to these items – such as: ▪ Returned to supplier for credit ▪ Taken out of service for repair ▪ Disposed of ▪ If any money was received (or expense incurred) as a result of action taken

	• Returned goods – detailing: ▪ What was returned and to whom ▪ Value of goods in terms of expected credit ▪ Date and other relevant details. **Classroom Activity – Handouts** Trainer distributes and discusses sample documents/records as identified on the slide.

Slide

Update internal inventory and stock control records

Activities involved in updating records:

- Conduct stock takes
- Add final/missing detail(s)
- Perform nominated calculations

(Continued)

Slide 112

Slide No	Trainer Notes

112.	Trainer presents it may be necessary to undertake the following in order to meet internal requirements for stock management:
	• Conduct stock takes – to:
	  ▪ Count stock-on-hand
	  ▪ Determine value of stock on hand
	  ▪ Identify stock use and/or shortages
	• Add final/missing details – to documents/information fields. This may relate to:
	  ▪ Dates; Names; Prices; Final/actual figures
	• Perform nominated calculations – to assist with statistical manipulation of figures/data.
	Classroom Activity – Demonstration and Practical
	Trainer demonstrates how to conduct a stock take and provides opportunity for students to practice the same.

Slide

Update internal inventory and stock control records

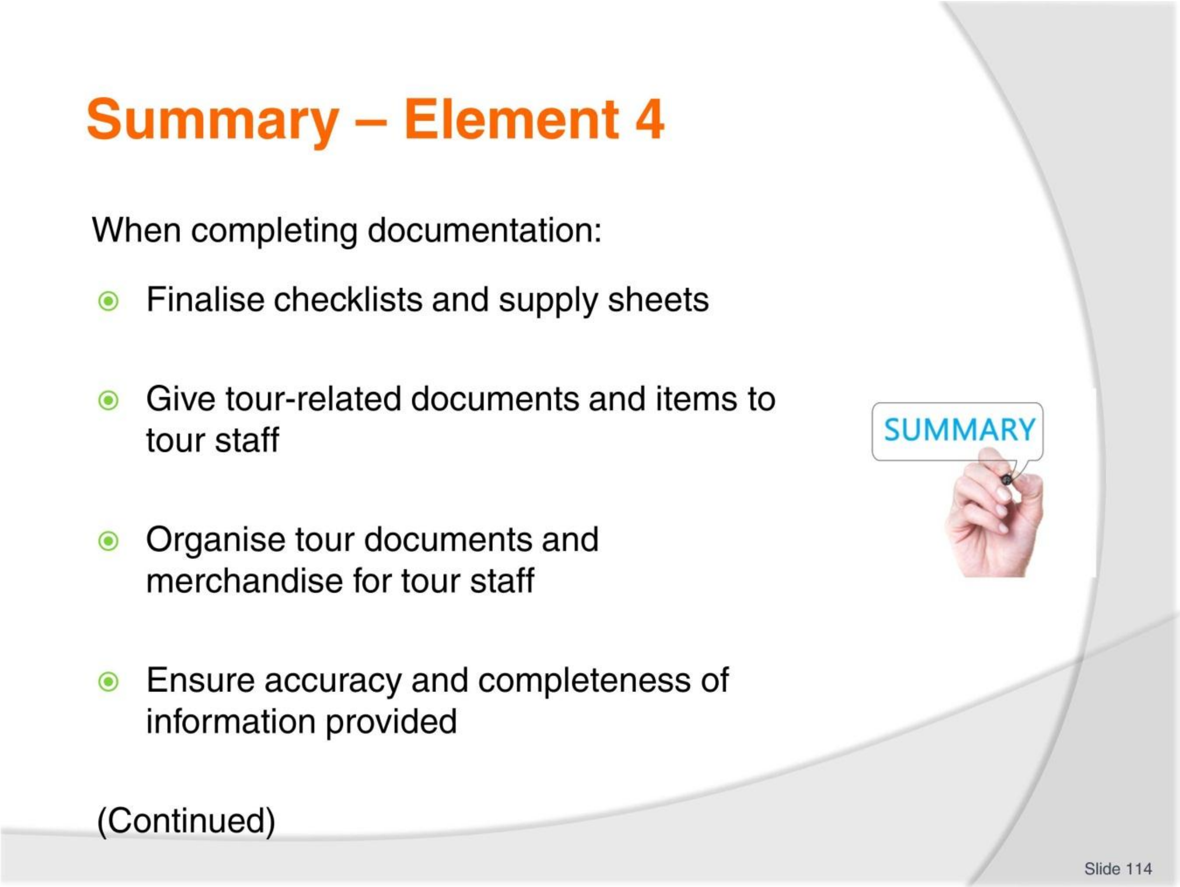
- Follow-up as required with whoever needs to be followed-up with
- Count stock returned
- Forward documents to management/administration
- File documents
- Pass on 'lessons learned'

Slide 113

Slide No	Trainer Notes

113.	Trainer continues describing activities which may be involved in updating internal records:
	• Follow-up as required – with, as appropriate:
	   ▪ Internal/tour staff
	   ▪ Suppliers
	• Count stock returned – when trip/tour returns to base
	• Forward nominated documents to management/administration – so:
	   ▪ They documents and data can be further processed
	   ▪ Accounts can be paid
	   ▪ Information can be incorporated into internal reports
	• File documents – for future reference
	• Pass on lessons learned from processing the documentation – to tour guides and leaders, management and administration.

Slide



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

Slide

Summary – Element 4

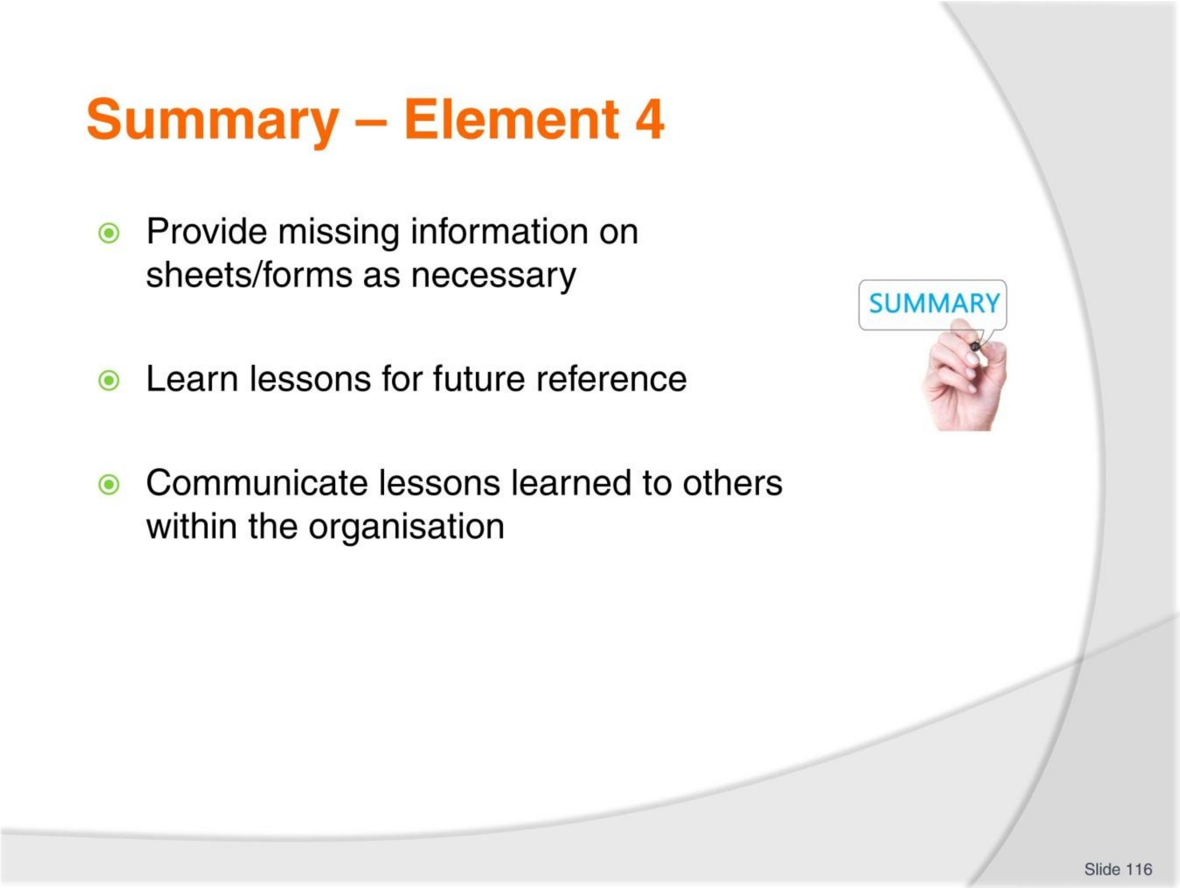
- Count stock on hand and stock returned from trips/tours
- Follow-up stock returned to suppliers for credit
- Forward documents to administration for processing
- Forward documents to management for their information

(Continued)

Slide 115

Slide No	Trainer Notes
115.	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
116.	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

Samples/examples of relevant documentation which may include:

- Passenger lists
- Rooming lists
- Passenger profiles, including special requests
- Passenger descriptive itinerary
- Technical or operations itinerary
- Written tour brief
- Scripted tour commentaries
- Manifests
- Catering information
- Promotional brochures for trips/tours
- Loading sheets
- Manufacturer's instructions for equipment
- Repair manuals
- Warranties and guarantees relating to new items purchased for the tour
- Copies of standard operating procedures and contingency plans
- Sample EMPs
- Maps.

Purchase related documents – such as:

- Delivery dockets
- Invoices
- Statements
- Credit notes
- Receipts.

Computers with access to internet and printers

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

William Angliss Institute

Specialist centre for foods, tourism & hospitality

asean

Australian Aid