Allocate tour resources

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

Trainee Manual





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

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Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria

Telephone:	(03) 9606 2111
Facsimile:	(03) 9670 1330

Acknowledgements

Project Director:	Wayne Crosbie
Project Manager	Jim Irwin
Chief Writer:	Alan Hickman
Subject Writer:	Alan Hickman
Editor:	Jim Irwin
DTP/Production:	Daniel Chee, Mai Vu, Cindy Curran

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

The ASEAN Secretariat is based in Jakarta, Indonesia.

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

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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a ‘toolbox’ which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The ‘toolbox’ consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you might notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim is of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees' chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of ‘Recognition of Prior Learning’ (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service
- Front Office

- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria". An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title:* statement about what is to be done in the workplace
- *Unit Number:* unique number identifying the particular competency
- *Nominal hours:* number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor might also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor might use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Allocate tour resources

This unit deals with the skills and knowledge required to Allocate tour resources in a range of settings within the tour industries workplace context.

Unit Code:

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

Nominal Hours:

40

Element 1: Determine resource requirements

Performance Criteria

1.1 Identify the factors that will determine resource requirements for a tour

1.2 Discuss resource needs with colleagues

1.3 Consider previous tours that have been conducted

1.4 Identify safety and legal issues that must be complied with

1.5 Determine availability of required resources

1.6 Identify specific resources for individual tours

1.7 Prepare short and long-term plans for resource acquisition

Element 2: Allocate resources

Performance Criteria

2.1 Coordinate the availability of physical resources

2.2 Match resources to identified tour requirements

2.3 Comply with budget limitations when allocating resources

2.4 Provide resource information and support to colleagues

2.5 Issue the identified physical resources as identified

2.6 Distribute physical resources to required locations

2.7 Arrange for third party supply of resources

2.8 Verify supply of appropriate and adequate resources with tour guide and other personnel

Element 3: Review resource allocation

Performance Criteria

3.1 Compare resources used with budget and revenue raised

3.2 Review actual conduct of tour and compare with expectations

3.3 Identify resources that need to be revised for subsequent tours

3.4 Revise standard tour-related documentation

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

The Assessment Matrix indicates three of the most common assessment activities your Assessor might use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

		Work Projects	Written Questions	Oral Questions
Element 1: Determine resource requirements				
1.1	Identify the factors that will determine resource requirements for a tour	1.1	1, 2, 3	1
1.2	Discuss resource needs with colleagues	1.1	4, 5	2
1.3	Consider previous tours that have been conducted	1.1	6, 7	3
1.4	Identify safety and legal issues that must be complied with	1.1	8, 9, 10	4
1.5	Determine availability of required resources	1.1	11	5
1.6	Identify specific resources for individual tours	1.1	12, 13	6
1.7	Prepare short and long-term plans for resource acquisition	1.1	14, 15, 16	7
Element 2: Allocate resources				
2.1	Coordinate the availability of physical resources	2.1	17, 18	8
2.2	Match resources to identified tour requirements	2.1	19	9
2.3	Comply with budget limitations when allocating resources	2.1	20, 21	10
2.4	Provide resource information and support to colleagues	2.1	22	11
2.5	Issue the identified physical resources as identified	2.1	23, 24	12

		Work Projects	Written Questions	Oral Questions
2.6	Distribute physical resources to required locations	2.1	25, 26	13
2.7	Arrange for third party supply of resources	2.1	27	14
2.8	Verify supply of appropriate and adequate resources with tour guide and other personnel	2.1	28, 29	15
Element 3: : Review resource allocation				
3.1	Compare resources used with budget and revenue raised	3.1	30	16
3.2	Review actual conduct of tour and compare with expectations	3.1	31, 32	17
3.3	Identify resources that need to be revised for subsequent tours	3.1	33, 34	18
3.4	Revise standard tour-related documentation	3.1	35	19

Glossary

Term	Explanation
4WD	Four-wheel drive vehicle
Activities	On-tour inclusions where tour group members participate in an arranged event
Duration	Length of a tour
Duty of Care	A legally imposed obligation on the business and staff to take reasonable care to avoid causing foreseeable harm to customers/people.
EMP	Emergency Management Plan
FIFO	First In, First Out method of stock control
Financial resources	Money, cash
HR	Human Resources
Human resources	Staff/employees – persons involved in the tour
Inclusions	Things included in a tour
JIT	Just-In-Time
O-O-O	Out-Of-Order
PFD	Personal Flotation Device
PPE	Personal Protective Equipment (and clothing)
ROI	Return On Investment
SOP	Standard Operating Procedure
Third party providers	External businesses who supply goods and services on a fee-for-service basis
U/A sheets	Sheets showing stock items which are Unavailable

Element 1:
Determine resource requirements

1.1 Identify the factors that will determine resource requirements for a tour

Introduction

One of the important first steps in determining resource requirements for a tour is to identify the factors that will determine what is needed.

This section differentiates between types of resources which are commonly required for a tour, explains practical ways in which information might be obtained to determine resource requirements and gives realistic examples of factors that will determine resource requirements for a tour.

Resources

Four classifications of resources exist which are necessary for tour operations:

- Physical resources – these are the goods/assets needed to support the tour.

  They include an extremely wide variety of items such as:

  - Vehicles
  - Camping equipment
  - Cooking equipment
  - Food and beverages
  - Maps, information sheets and Fact Sheets for tourists
- Financial resources – these are the funds that will be needed to enable the tour to process as planned and operate in whatever circumstances are experienced.

  Financial resources can include:
  - Cash in local currency
  - Cash in currencies of the various countries to be visited
  - American dollars
  - Travellers' cheques.

- Human resources – these are the staff provided to support the tour.

  Human resources can be internal of from outside the organisation and might include:
  - Tour leaders
  - Tour guides
  - Drivers
  - Cooks
  - Security

- Information – this is the knowledge required to facilitate tour operations and activities.

  It includes:
  - Local knowledge
  - Knowledge of countries, carriers, currencies and cultures
  - Knowledge of all attractions and destinations to be visited
  - Knowledge of routes and sights
  - Knowledge of SOPs that tour staff are required to comply with.

Practical ways to identify what might be needed

The following are ways a person can identify what resources might be needed on a tour.

- Research and read tour brochures and promotional materials – to identify what has been advertised for the tour
- Review contracts which relate to the tour – to identify arrangements which have been negotiated and form the basis of this legally binding agreement
- Talk to others – see next section
- Read end-of-tour de-briefing reports from previous tours – to identify lessons learned when the tour returned/was complete
- Refer to tour-specific resourcing sheets – some operators develop an evolving list of resources required for the different tours they offer.

  The list begins with a common sense listing of requirements for the first trip and is up-dated after subsequent tours as other resources are identified as being necessary.

  Over time this list can grow into a rich and accurate source of resources required for individual tours types/categories. Not all operators use this approach.
- Read customer comments/feedback from previous tours – to obtain the tourist perspective about what needs to be maintained and/or changed in relation to resourcing future tours
- Use common sense – this is a very big element when determining resources needed for a tour – management and the people on the tour will expect you to use common sense based on previous experience, personal knowledge and expertise of other trips and tours and knowledge of the activities, climate, terrain, sites, destinations and locations which will be visited.

Factors that will determine resource requirements for a tour

Factors that will determine resource requirements for a tour might be related to:

- Type of tour – this is a huge factor as it relates to 'price paid' by travellers and will embrace inclusions advertised as well as customer expectations.

  As such this will impact on:

  - Type and quality of resources required
  - Quantity/volume of resources to be allocated
  - Vehicle/s required for transportation
- Location of tour – this has a particular effect on:
  - Currencies to be taken
  - Type of information to be provided
- Duration of tour – this is the length of a tour.

  It relates to:

  - Whether the tour is less than a day – if tour are more than a day then accommodation will need to be organised or taken
  - The longer the tour, the more resources will be required
- Starting and finishing time of tour from the tour operator's premises – these might impact as follows:
  - Early starts might require transfers/pick-ups to be arranged
  - Early starts might require the provision of breakfast prior to departure
  - Late tour finishing times might require accommodation to be arranged for the night after the tour has actually finished
  - Late tour finishing times might require transportation of tourists to their accommodation after the tour has finished

- Size of tour group – this is a critical factor to be aware of.

  It is vital to know with 100% surety:

  - The numbers going on tour
  - Numbers of any customers leaving the tour group along the way – some tour group members might leave one tour to take up with another group part way through a tour, or they might have elected to stay at a given tour destination for personal, business or family reasons
  - Those joining the group while on tour – in some cases new customers can join the tour along the way

- Special needs and special requests – many tours require compliance with special needs and/or requests.

  'Special needs' generally refers to catering for people who have needs as a result of a disability.

  Examples might relate to:

  - Tour group member will be travelling with a carer
  - Need for wheel chairs
  - Requirement for special equipment/resources to address identified special need/s

  'Special requests' generally refers to wishes or preferences of customers for certain goods or services to be provided to enhance their satisfaction and experience.

  Examples might be:

  - Including a certain brand of beverage
  - Staying longer at a certain destination
  - Certain sleeping and/or seating arrangements
  - Requirements relating to dealing with cultural, religious, health-related or dietary food/beverage concerns

  While there is always a limit to what can be done in these regards but most operators try to accommodate what they can,

- Types of customers expected on tour – this relates to identifying the profile of tour group members as best as possible.

  Relevant considerations in this regard can relate to determining:

  - Ratio of males to females
  - Age/s of people in the group
  - Number of disabled
  - Number and age of infants
  - Any special interest groups which might be travelling/touring and what those interests are
  - Numbers of repeat/returning customers – and the tours/trips they have previously taken with the operator

- External resources available – this relates to items available on-tour and/or at tour site from third parties.

  These items might be arranged in advance of the tour departure to facilitate tour operations and payment for goods and services might be organised using:

  - Cash – often at an agreed, discounted rate
  - Via vouchers or coupons
  - Specific arrangements that have been made – such as tour leader signs for goods and services received and the account is charged back to the organisation for payment

- Tour conditions – this relates to considering the following or expected/anticipated circumstances of the tour and factoring them into the resources to be allocated:
  - Weather – in terms of:
    - Recent previous weather conditions (has there been lots of rain? Has there been excessive heat or cold?)
    - What is the weather like at the destinations at the moment?
    - What are the weather forecasts for the destinations for the duration of the tour?
  - Environmental issues – attention needs to be paid to issues such as:
    - Is there local flooding at proposed destinations?
    - Is there unacceptable smoke or smog?
    - Is there unacceptable civil/political unrest?
  - Geographical issues – for example:
    - Is the topography of countries/areas on the itinerary flat or steep and how will that impact transport?
    - What are the conditions/standards of roads and transport infrastructure and how ill that impact vehicle choice?
    - Is transport for water and road required?

- Understanding activities, products and services advertised for the tour – as this is likely to influence resources in terms of:
  - Safety equipment and personal protective equipment required
  - Clothing
  - Tents
  - Catering
  - Type and amount of physical resources required.

1.2 Discuss resource needs with colleagues

Introduction

A standard protocol when determining resource requirements for a tour is to talk to others/colleagues and discuss relevant resources and needs.

This section identifies who those colleagues might be and identifies possible topics for discussion.

Colleagues who might be talked to

There are three classifications of colleagues who might be talked to:

- Management
- Administration
- Staff who have been on tour.

Management

Management must be involved in the discussion:

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

Administration

Administration must also be involved in the discussion:

- To determine operational/working parameters for the tour
- To obtain budget data – funding amounts, budget codes and similar
- To capture data/figures relation to previous similar tours – to use for basis and comparison purposes
- To identify human resources available for the tour

- To determine paperwork/documentation that needs to be completed in relation to capturing required resource allocation and usage for the tour
- To assist with optimising use of limited resources – by contributing to discussions/action which facilitates sharing of resources amongst other tours/other staff within the organisation

Other staff

There is also a need to engage in discussions with other employees who have been involved with similar tours.

These discussions are important to:

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

Possible topics for discussion

In addition to other topics which have already been identified, discussion with colleagues should also address:

- Analysing operational issues – which needs to address:
  - Matters and issues to be undertaken
  - Timing of such activities
  - Location of these events
  - Extent of involvement/engagement by staff, tour group members and external operatives
  - Equipment and other resources required for each individual ‘operational issue’
  - Risks and risk assessment and management
  - Action taken by staff to:
    - Identity, prevent and predict issues
    - Address and respond to issues
    - Report and investigate issues

- Integration of a range of operational matters across **all** tour types in order to:
  - Enhance the customer experience
  - Optimise use of all resource types by the organisation through sharing and effective scheduling
- Considering how lack of resources impacts the tour and the tour group members – these effects might include:
  - Timing of the delivery of services – for example, services listed on itineraries might not be able to be provided at scheduled/advertised times
  - Timing of tour dates and schedules and itineraries – these might all need to change where there is a reduction in staff to conduct tours, and/or insufficient physical resources to support the implementation of tours/tour activities
  - Capacity of tour to deliver activities and inclusions as advertised/as contracted – which might mean:
    - Reduction in services
    - Lowering of quality/standards
    - Shortening of time allocated for activities, events and/or destinations
  - Safety issues – as it relates to:
    - Travel and transport – in terms of lack of equipment on vehicles, lack of service and maintenance to tour vehicles and/or failure of the organisation to ensure drivers are sufficiently trained and experiences in driving the necessary vehicles
    - Engagement with scheduled activities as listed on itineraries
    - Safety of PPE and other items provided by the operator for use (by staff and tour group members) when on tour
- Identifying emerging resource needs – in order for the tour organisation to maintain its market position, viability and general image it is vital employees assist by identifying these needs and taking whatever action they can to ensure these requirements are met.

  Keys in this process are:
  - Reading customer comment cards/feedback sheets from tour group members who have completed previous/similar tours
  - Talking to the tour guides/tour leaders who conducted previous/similar tours
  - Taking similar tours conducted by other tour organisations – to see what they are doing, what they are offering, how they deliver their tours and the resources they use

- Ensuring there is a full understanding of all promises made by the tour company to tour group members by:
  - Maintaining full awareness of advertisements regarding tours to be conducted and the inclusions and other undertakings made by the organisation
  - Taking the time to secure total awareness of all tour-related guarantees contained within relevant tour contracts made with tour groups, tour partners and co-chair operators.

1.3 Consider previous tours that have been conducted

Introduction

Allocation of resources for any tour must always take into account the resources allocated for previous similar tours which have been conducted.

This section provides background to this requirement, presents practical elements of the process discussing issues which need to be considered and explains the essential nature of this step.

Background to this stage

The need to consider previous tours is more than discussions with colleagues as explained in the previous section. This aspect of the process should involve:

- Obtaining relevant data, statistics and reports, files and documentation
- Drilling down into the facts and figures to analyse the information to extract information relevant to the tour being organised.

Practical aspects of the process

\When looking at previous similar tours which have been conducted there is always a need to consider the following:

- Tour statistics – looking at the facts and figures of the tour such as:
  - Tour numbers
  - Demographic details of tour group members
  - Special requests which were made
  - Destinations, events and attractions
  - Inclusions
  - Duration
  - Itinerary
- Analysis of feedback –this analysis should factor in:
  - Evaluation from staff who conducted/participated in the tour so first-hand input from those who were there can be obtained.

    The basis of this evaluation is traditionally:

- – Mandatory end-of-tour reports completed by tour guides and tour leaders when they return from tours
- – Compulsory additional reports required by tour operators such as:
  - o Incident reports
  - o Safety reports
  - o Daily reports/summaries
  - o Reconciliations

- Interpretation of verbal and written feedback captured from past tour group members – in terms of:
  - – Feedback gained throughout the tour at designated points for obtaining feedback, such as after certain destinations or activities
  - – Feedback sourced on completion of the tour when the tour party returned and was finalising the tour
  - – Feedback obtained after the tour via written or online feedback and/or through Customer Comment cards
  - – 'Customer satisfaction' – most tour operators will seek *specific* feedback from those who return from tours looking to identify their level of satisfaction.

  In general:

  - – **High** levels of satisfaction with a previous tour indicate a need to replicate whatever resources were allocated to the previous tour to the *next* tour
  - – **Low** levels of satisfaction with a previous tour indicate a need to improve or supplement resources allocated to that tour for the *next* tour.

    'Improving' or 'supplementing' resources might mean:

    - o Increasing the amount/quantity of resources allocated
    - o Changing the type/nature of resources provided
    - o Altering the brand of supplies provided to a better quality products
- Contributions from strategic partners – such as:
  - – External/third party providers – such as carriers, transport providers, security providers
  - – Attractions, events, destinations, sites and businesses visited as standard inclusions for the tour
  - – Businesses which supplied services to the tour group such as accommodation, catering, activities, side trips and tours
  - – Joint-venture and co-chair partners including stakeholders such as major business investors and/or associated offices.

- Investigating ‘reportable events’ from previous tours – these are occurrences which the tour operator demands must be reported on by tour staff.

  That is, reporting is compulsory for all of these events.

  ‘Reportable events’ are generally classified as:

  - Accidents – where an occurrence resulted in actual injury to a person or damage to property belonging to a tour group member, the tour operator or a business or organisation where the tour operated
  - Incidents – where (for example) there was a breach of tour operator protocols while on tour (such as a breach of security or safety)
  - Near misses – where something occurred which could have easily resulted in an accident but did not actually result in an accident.

Reasons to undertake this stage of the process

This research and analysis needs to be done in order to:

- Gain a frame of reference for comparison purposes – the process helps describe what others did for similar tours and what results they achieved/experienced or produced
- Obtain actual examples of resources used for those tours – so these can be used as a basis for the next allocations
- Determine end-of-tour input from staff regarding suitability and sufficiency of resources provided – so lessons learned from previous tours can be applied to upcoming tours.

1.4 Identify safety and legal issues that must be complied with

Introduction

At all times it is vital to ensure necessary safety and legal issues are complied with when allocating tour resources.

This section discusses possible requirements in this regard.

Duty of Care

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

- Create and maintain a workplace or (touring) environment that does not pose a risk to people (staff, members of the public, customers)
- Take action to avoid causing foreseeable harm to people/customers/tour group members or their property/belongings.

This requirement applies to all organisations.

Civil law

Where this Duty is breached – and injury and/or loss results – the employer and/or staff responsible can expect severe penalties to apply if those affected take legal action under civil law to seek recompense.

When a person takes legal action under Civil law they 'sue' the other party usually for things such as:

- Negligence – which has caused loss or injury
- Breach of contract – where (for example) believes their holiday/package did not deliver what was advertised/promised
- Defamation – where someone says/writes something defamatory about another person/business.

Remedies for successful civil cases include payment of damages – to an amount deemed appropriate by the Court.

Failure to discharge this Duty of Care can result in being sued for negligence.

Different types/levels of negligence exist:

- Contributory negligence
- Gross negligence
- Vicarious liability

- Comparative negligence.

The various classifications of negligence help determine the penalty if found liable.

To help avoid this type of legal action staff must ensure necessary safety and legal issues are complied with when allocating tour resources.

Identifying requirements

To identify safety and legal issues which might require compliance from the point of view of allocating resources for tours:

- Talk to management
- Seek advice from government-based 'health, safety and welfare' agencies
- Search the web for information/requirements in other countries to be visited
- Ask industry bodies for their advice
- Speak with employees in other tour operating businesses who have responsibility for loading/allocating resources for tours
- Read advertising materials and/or contracts relating to the tour – to determine what has been promised and what needs to be provided
- Undertake formal risk management activities as appropriate to the tour type and proposed inclusions/activities – see below.

Risk management

Risk can be seen as any hazard or source of danger with the potential to adversely impact on the operation and/or outcomes of a tour.

Risk management is the term used to describe the activities and practices the business undertakes to address those hazards or sources of danger.

Formal risk management requires the tour operator to undertake a structured procedure comprising:

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

Complying with legislation

It is a standard procedure all employees and tours must comply with all relevant legislation.

In practice this means operators must identify and meet all requirements and regulations:

- Applicable specifically to tours and Tour Guides – where such legislation exists

- Applicable in their host country
- Applicable in different countries they visit/lead tours to
- Applicable to all activities undertaken on tour.

It is worth noting:

- Employers might be vicariously liable for the actions of their staff
- Employees **do not have a legal defence** if they commit an offence because their employer told them to break or ignore a law.

Generic examples of what is required

In general terms there will be a need to:

- Ensure vehicles used are safe and comply with relevant in-country requirements in terms of:
  - Roadworthiness
  - Registration
  - Insurance.
- Provide regular service and maintenance to vehicles – to optimise their serviceability and reduce the potential for breakdown or accident
- Make sure drivers of vehicles:
  - Are licensed to drive the type of vehicle they are driving – special requirements might apply to certain types of vehicles and/or vehicles over set weights or lengths (or other dimensions)
  - Hold a valid and current licence of the type/s required in all countries to be visited
- Provide all necessary PPE for all tour group members (and staff) – in order to:
  - Enable them to participate in scheduled activities, sports, events, games and other inclusions.

    For example when conducting white water rafting or kayaking there would be a need to provide high-visibility life jackets/PFD, safety/white water helmets, knee and elbow pads, whistles, rescue ropes, rescue rope throw bags, neoprene booties, white water knives, padded gloves.
  - Protect them from naturally occurring harm (including sunburn) when on tour
- Produce and provide relevant safety information and advice (including demonstrations of requirements, and [where appropriate] practice/drill prior to engagement with activities etc.) to tour group members – it can never be assumed:
  - Customers will know even the most obvious risks
  - Tour group members will know what to do to cope with those dangers, avoid damage or injury or otherwise protect themselves or their property
- Develop, possess and know the contents of a range of Emergency Management Plans – to cope with possible emergencies which can be reasonably foreseen for the tour type which is about to occur.

  The tour operator is also responsible for ensuring these EMPs have been shared with tour staff and they have had opportunity to practice/drill in their requirements.

All necessary supporting resources to enable the EMP to be implemented, as written, must also be provided.

- Provide lighting for situations where tour group members will be spending time at night, outside in the dark.

  Resources in this area can include:

  - A generator
  - Portable lighting
  - Hand-held torches
  - Helmet-mounted lights

- Provide required support systems and technology as appropriate to the tour type and destinations to be visited – this can relate to the need to:

  - Ensure fire-fighting equipment (extinguishers, fire blankets) are provided in situations where fires are going to be lit – such as fires for cooking, or camp fires to generate atmosphere
  - Make sure vehicles are fitted with:
    - Fire extinguishers
    - Communication equipment – such as portable radio/radio in tour vehicle, cell phone/s, satellite phone and/or emergency beacon, locator beacon or distress/survival beacon
    - Vehicle recovery equipment – high-lift jacks, winches, tyre deflators and pumps, sand tracks
    - Suitable lights – for night driving

- Supply a suitable first aid kit – as recommended by relevant authorities and appropriate to the potential injuries which could reasonably be anticipated for the tour.

  Attention should also be paid to ensuring someone (at least one staff member) on the tour has qualified as a First Aid provider and has current status as such.

  Where the Tour Guide/Leader will be taking a walking component/inclusion on the trip a portable first aid kit might also be called for and there might be a need to issue whistles to tour group members in some conditions.

1.5 Determine availability of required resources

Introduction

Planning of resources for tours must always factor in the availability of required resources.

This section provides insight into how availability might be assessed and looks at issues relating to this requirement.

Determining availability and considering related issues

Working out what resources are available to service up-coming tours requires a combination of approaches to be taken.

Where resources identified as being necessary are not available, action must be taken to ensure they are obtained and allocated as required.

A deficiency of necessary resources can never go ignored or unaddressed.

A combination of the following will determine resource availability for an upcoming tour:

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

  These items should be added to the items listed as already available

- Review third-party providers used by the tour operator for supplying goods and services when groups are on-tour – as these providers are often essential resource providers on which most/many tour operators rely.

  If there are no problems with these providers, then the items/services they can deliver should/can also be added to the list of what is available
- Review items which are out-of-operation – these might be items which are:
  - Lost/stolen
  - Damaged or malfunctioning and cannot be used
  - Being repaired
  - Being serviced/maintained
- Review rosters – to identify:
  - Classifications of employees available for work – guides, drivers, cooks, hosts, interpreters
  - Who is available – many of the resource allocation decisions made about staff will depend on the individual staff member and their experience and expertise.

    Not all cooks are the same; not all tour leaders have the same capacity or abilities
  - Their availability to work – with reference to days and hours

- Check relevant budgets – to determine:
  - Money which has been spent
  - Available funds.

1.6 Identify specific resources for individual tours

Introduction

In addition to what are 'standard' resources allocated to regular tours there can always be a need for additional resources to be allocated to certain/individual tours.

This section explains how such tours might be identified, discusses issues commonly associated with such consideration/s and presents a representative list of resources which might be required.

Identifying tours with specific/individual needs

Individual/specialist tours

All one-off tours will have individual need regarding resources.

One-off tours are tours designed specifically for one client/group in response to needs, wants and preferences they have identified.

They might have, for example:

- Stated the destinations they want to visit
- Indicated the mode of transport they want to use
- Dictated timing and duration
- Stipulated the activities they want to engage in
- Identified the accommodation, catering and other tour-related services, products and inclusions which will comprise the total package.

These tours are always subject to a contract which spells out the particular requirements for the tour.

This contract – coupled with discussions with the client and tour operator management – MUST form the basis of determining specific resources required for the tour.

If the resources required are not identified *specifically* in the contract, they will be able to be identified by reading the contract to ascertain requirements based on the destinations, inclusions and activities contained in the document.

Regular tours with individual need

Regular tours are tours conducted frequently – they might be conducted daily, weekly or several per day.

These tours might, however, have individual needs which differ between each tour.

These differences/individual needs can be based on:

- Weather conditions – for example:
  - Rain might require provision of umbrellas and wet weather gear
  - Prolonged bad weather might mean a 4WD vehicle is used rather than the normal/standard two-wheel drive vehicle
  - Severe cold conditions might require supply of thermal clothing
  - Sunny conditions might mean a need for sunscreen, sun glasses, umbrellas
- Time of day:
  - For 'after dark' tours there can be a need to provide hand-held torches for staff and tour groups members or cap/helmet lights
  - Tours occurring mid-morning and/or mid-afternoon can necessitate provision of catering (facilities and food) to allow the preparation and service of a morning/afternoon tea
  - Tours occurring over a recognised meal period will/might likewise necessitate supply of catering for a breakfast, lunch or dinner unless alternate/outside catering arrangements have been made
- Special needs tour group members – some tour vehicles carry standard special needs equipment (fold-up wheel chairs, ramps) but other items will need to be provided on the basis of pre-notification of needs for certain individuals or tour groups.

  Resources in this instance might be:
  - Staff (human resources) with experience with certain disabilities and with certain skills such as signing (for the hearing impaired)
  - Specified provisions to support those who are carers – many/most supply their own needs but on occasion (especially with overseas visitors) there can be a need to supply items/equipment and products 'as advised'
  - Handouts (information, advice, maps, instructions etc.) in:
    - Large print – for vision impaired
    - Different languages – to meet the needs of different language speakers
- Changes to routes and inclusions – there are lots of reasons why routes and inclusions for a regular tour need to change.

  It is important when these changes are imposed on the itinerary attention is paid to working out whether or not the variations necessitate more or different resources than usually provided for the normal/regular tour.

  For example:
  - A different road route might require a different vehicle
  - A different walking route might impose demands on footwear or walking sticks plus water – or impose health-related restrictions on those who can participate
  - A change to activities can mean a need for new information/advice sheets plus the need to provide different PPE.

Representative resources

As the previous two sections highlight, resources required must always reflect the individual nature of each tour being serviced but the following gives a general overview of items which need to be considered:

Physical resources

This relates to identifying/naming types and forms of physical resources required, including:

- Vehicles and vessels – which might include aircraft and other types of transport, including live transport (such as horse or camels), bikes and motorbikes
- Camping equipment and requisites
- Catering equipment – covering cooking equipment, holding units (for hot and cold and frozen food) and food service units and utensils
- Food, beverages and refreshments
- Safety equipment – including PPE, first aid kits, rescue and recovery gear and communication equipment
- Recreational and activity equipment – sports equipment, play gear
- Maintenance equipment – tool kits, spare parts, service manuals, oils and filters
- Educational equipment – handouts, props and materials, consumables
- Cash – for unexpected and out-of-pocket expenses which cannot be paid for on the business credit card, cannot be charged back to the operator or where travellers' cheques are not accepted
- Vouchers – these are the coupons given to tour group members enabling them to obtain certain products/services as appropriate to each individual voucher.

  For example a voucher might entitle the holder to:
  - Entry to an attraction
  - Accommodation
  - Meals, food, drink, refreshments
  - Rides and games
  - Merchandise
  - Photographs.

It is important to list physical resources by:

- Type
- Number, volumes, amounts/quantity required
- Monetary values.

Note should also be made of their physical location.

Human resources

As mentioned in the previous section not all staff are equal in terms of their experience and expertise so this will impact on their classification in terms of availability/suitability for certain tours.

The process of identifying staff in reality means:

- Naming staff to be used for each tour
- Determining roles and responsibilities for each identified staff members – based on the experience, qualifications, training and integration of skill sets for each employee to ensure all requirements are covered off
- Making sure hours worked by staff allocated:
  - Reflect rostered hours
  - Are sufficient to enable delivery of required services and required service levels/standards
  - Are in accordance with employment instruments under which employees work – in order to eliminate/minimise the need to pay excess labour payments

Human resources might include:

- Drivers
- Tourist guides
- Tour Leaders
- Driver guides
- Hosts and hostesses
- Activity leaders
- Campsite cooks
- Interpreters
- Camp and tour assistants

Human resources must be described by:

- Classification
- Number
- Hours
- Projected wages/labour cost.

1.7 Prepare short and long-term plans for resource acquisition

Introduction

Determination of resource requirements for tours often requires the preparation of short- and long-term plans for resource acquisition.

This section notes the legal position of tour operators in relation to changes needed to advertised itineraries and inclusions, describes common responses taken by operators when changes need to be made, and discusses what might be done in the short-term and long-term to address resource requirements.

Standard exclusion clauses

All tour operators include statements in their standard Terms and Conditions which allow organisations to change their advertised tours as and where necessary to address problems Relayed to not having required or sufficient resources.

These statements might address the following:

- The operator can change the itinerary – at any time and at their discretion
- The organisation can change the vehicle/method of transport originally offered or advertised'
- The business can sub-contract advertised services to another operator in certain situations
- The tour business reserves the right to substitute nominated accommodation and/or catering arrangements
- No eligibility for discount, refund or cancellation is created when a change to an itinerary or inclusions occurs.

Common responses to changes

In situations where the business needs to make changes to their advertised itinerary they will always be aware of the need for them to ensure the alternative they offer/introduce:

- Represents **from the customer's point of view** a viable substitute for whatever has had to be removed/cancelled
- Is comparative 'value-for-money' in terms of the money paid by customers for their tickets.

With this in mind where a business has to make changes to their advertised itinerary and/or inclusions they might:

- Advise those who have booked a tour as soon as possible – explaining the change/s and the reason/s behind the change

- Apologise for the change – perhaps giving the customer the option to:
  - Cancel their booking – this is not an option commonly offered
  - Pay a reduced price
  - Join a later tour which will follow the original itinerary and feature the inclusion which has to be deleted/changed now
- Substitute the changed item with another item – by:
  - Replacing it with a similar alternative
  - Including another destination, activity of similar duration and which can be seen as having similar value
- Amend the itinerary – by:
  - Changing times at other destinations/locations and/or activities
  - Altering transportation used
  - Revising tour start and finish dates and/or times
- Offer products and/or services by way of apology – this might include;
  - Supply of nominated merchandise to customers
  - Provision of discount voucher for subsequent tours and/or other products/services available from the tour operator.

Short-terms plans

The following can be effective options for addressing identified problems with resource requirements in the short-term:

- Imposing a short delay to the departure of the tour or the start of an activity – while identified/required resources are obtained.

  This course of action is usually supplemented by:
  - An apology
  - An explanation
  - Refreshments or food and beverages
- Moving required resources from one place to another – this can mean:
  - Moving items from one tour vehicle to another
  - Shifting items from the prepared ‘tour stock’ of one tour to a tour about to depart or an activity about to commence
  - Taking resources out of the supplies/stock (store room) of the operator and re-locating to a tour, tour vehicle or tour group

- Obtaining required resources in the immediate short-term – this might be able to be achieved by:

  - Contacting another tour operator (even a business which is direct competition) and asking to borrow required items from them – in many cases there is an effective working relationship' for mutual benefit between many competitors
  - Telephoning suppliers and organising 'emergency' provision of required items – which might include:
    - The tour bus/vehicle picking up requirements *en route*
    - Paying for a courier to make a special delivery of the required items from the supplier to the tour business
- Contacting destinations and attractions – and making enquiries in relation to:
  - Whether they have their own resources as required for the tour
  - If they are willing/able to loan or hire them to the tour operator
  - Determining quantities and condition/safety of their resources
  - Negotiating a mutually acceptable rental price
- Relying on the Terms and Conditions clauses in the Tour Contract/Agreements – and:
  - Amending the tour as required
  - Substituting the advertised tour with a pre-planned 'Plan B' – an approved/authorised tour which has already been arranged as part of the organisation's risk management and contingency planning activities.

Long-terms plans

The business might elect to look at one or more of the following in term so long-term plans to address identified resource problems/requirements:

- Acquire extra resources as identified –which might involve:
  - Purchasing items
  - Leasing items
- Service items – which means organising and providing repairs and maintenance in order to return unsafe/unusable items back to a required standard of serviceability
- Amend current standard tours – by:
  - Changing the itineraries and inclusions as necessary on the basis of the resource issue applying
  - Changing all internal and external advertising and promotional materials used to market the tour/s

- Develop new tours – on the basis of:
  - Removing inclusions, activities, destinations etc. which can no longer be included because of the resource issue – and not relacing these with anything else
  - Substituting alternative inclusions, activities, destinations for those which have been removed
  - Changing the name/focus of the tour
  - Altering the price of tickets for the tour.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

1.1 Identify a tour company and two tours conducted by that business.

(Note: one of these tours forms the basis of Work Project 2.1)

For those two tours determine resource requirements (that is, generate a comprehensive list of all resources required for each tour) providing evidence you have:

- Identified relevant factors which will impact on and determine actual resource requirements for each tour
- Discussed resource needs with 'relevant others' as this applies to each tour
- Considered resources used/allocated to previous tours
- Identified and taken into consideration all applicable safety and legal issues which apply to both tours
- Ensured required resources will be available when required for both tours
- Taken into account any 'special requirements/requests' which might apply to either of the tours
- Prepared a plan for acquiring resources required which are not immediately available for either tour.

Summary

Determine resource requirements

When determining resource requirements:

- Understand the different type of resources required – physical, financial, human and informational
- Identify the classifications within each resource type
- Talk to others to get their input about what is required and what is used
- Read the materials published/issues by the tour company to help determine what is used/needed
- Use common sense
- Factor in tour types, duration, destinations, frequency, tour schedules and tour group size
- Take ‘special requests’ into account
- Analyse previous and current use
- Make ‘safety’ a constant standard/requirement when determining resource allocations
- Comply with any legally-imposed obligations regarding resources required
- Calculate resources required rather than guess what is needed
- Plan/prepare to meet future identified resource requirements
- Read the ‘Exclusion clauses’ the tour company has included in its ‘Terms and Conditions’.

Element 2: Allocate resources

2.1 Coordinate the availability of physical resources

Introduction

There is always a need to coordinate the availability of physical resources for tours because resources are scarce and expensive commodities which must be properly managed and efficiently used.

This section looks at issues which impact the availability of physical resources and identifies techniques to assist with coordination to optimise their use.

Factors impacting resource availability

The factors affecting what resources are available for upcoming tours include:

- Other tours currently being conducted at the time – by type, number, destination and number of tour group members.

  The resources already allocated to these tours will normally be unavailable however timing coupled with the nature of the item is the critical element here.

  For example, a tour returning at 10:00 today might allow *certain* resources to be off-loaded from that tour and stowed immediately on to a bus ready for another tour at 12:00.

  Obviously where items need cleaning/repairs/service this will not be the case.
- Level of physical stock-on-hand – the amount of inventory kept by the business to service tour needs: while this stock can be supplemented by additional purchases there is always a lag/lead time before new stock can be obtained
- Tour schedules – which will identify the specific requirements/demand placed on the limited supplies by other tours which are also scheduled to depart/be conducted at the same time as other tours
- Cleaning requirements – where items need to be cleaned and/or sanitised, a suitable time must be allowed for this process to occur.

  For example, tents will need to be cleaned, vehicles will need to be washed and protective clothing worn by participants will need to be laundered.
- Servicing and maintenance requirements – many resources need to be regularly serviced to maintain their operational status/efficiency and/or to keep them in a safe operating condition.

  Safety equipment will need testing, camping equipment might require repairs and buses and 4WDs will need scheduled servicing and minor repairs to maintain their roadworthiness.

- Staff development activities – while this is not a large consideration there can be times when certain staff are unavailable because they are being trained, visiting new destinations, learning new skills, and/or undertaking testing or certification.

  Other staff-related issues can also cause short-term impacts on the availability of human resources – such as staff sickness, leave, accidents and rostered time off.

Techniques to assist with coordination

Ways to assist with the coordination of resources for tours include;

- Tour load sheets – these are the sheets developed for individual tours which list all required physical resources by type and quantity – and when they are obtained and stowed ready for use (in a vehicle, in a bay or in a tour box) they are ticked off on the sheet to show they are available and ready to go
- Workplace white board – some businesses use a white board which staff can use to write up any items they require for an upcoming tour.

  A designated person then follows this up to determine if the item can/should be provided and takes appropriate action to obtain same if deemed necessary.

  Some businesses use a register/book as an alternative to this.
- Restrictions on access by staff to store areas and inventory stocks – it is standard practice for most tour businesses to heavily restrict the personnel who are authorised to enter store areas.

  This is done to prevent staff 'helping themselves' to items which might have been ear-marked for allocation to another tour/group.

  In the same way there can often be a total ban on the movement of any stock from inventory/stores unless accompanied by a suitably authorised and signed Requisition Form or similar.
- Just-In-Time (JIT) provision of resources for tours – this is an option where the resources for a tour arte not organised/allocated in advance suing load sheets but are determined shortly/immediately before the tour departs based on actual numbers participating in the tour.

  In these instances maximum persons are set for each tour (so the top numbers for a tour are always known) and the *actual* resources required reflects the *actual* tour group numbers rather than a theoretical figure.

2.2 Match resources to identified tour requirements

Introduction

Allocation of resources to tours must match the identified requirements for the tours to be conducted.

This section discusses the practice of physically matching resources to requirements.

Matching resources to requirements

In many ways this stage of resource allocation is the simplest and easiest of all the processes in resource allocation for tours **providing proper planning and preparation has taken place** because it means all the hard work has already been done and the activities required are merely a case of:

- Providing the correct type of resources – as identified (physical, human, financial, information).
- Providing the identified quantities of each resource
- Stowing/stocking each item as identified – in a vehicle, in an information pack, in a box or some other tour container
- Providing each item by the time required.

This is summed up by the industry as providing:

> "The right items in the right location, at the right time and in the right quantity"

Final checks

Inspections of each physical item required need to be undertaken as items are loaded or handed over.

SOP might be for the tour guide/leader to sign for items given to them/provided for the tour verifying the items are 'all present and correct' in terms of type, quantity and 'fitness for purpose'.

When they sign these lists/sheets they are assuming responsibility for the items and this list forms the basis of the checks made when the tour returns and items are unloaded prior to cleaning, servicing, re-stocking etc.

Last-minute additions

Many tours have special requests which need to be accommodated and while many of these are pre-planned in advance, many also require last-minute additions to the standard set of resources provided.

In relation to these late inclusions attention must be paid to ensure:

- Extra items are added to loading sheets as required
- Extra charges (where legitimate) are levied against tour group members so the business recoups money it has expended
- Good ideas for including these extra items as standard inclusions on other tours are captured and integrated elsewhere into the SOPs of the organisation
- Adjustments to existing plans are made where a last-minute inclusion for *this* tour has meant resources have been taken from stock/resources allocated to another tour.

2.3 Comply with budget limitations when allocating resources

Introduction

Resources need to be allocated in accordance with budget limitations which apply.

This section discusses budget limitations and how they impact allocation of tour resources.

Fixed and variable resources

Fixed resources are the resources allocated to a tour independent of other factors.

Regardless of these other factors (number of destinations, number of stops, duration, weather, time of day, number of tour group members and similar) these resources will always stay the same as determined/identified by the organisation for that tour.

Variable resources are those which vary as the details of the trip vary.

For example:

- As the duration of the tour increases, the amount of resources required goes up – as duration falls so do the resources required
- As the number of tour group participants grows, so too does the need for more resources – as the number of participants drops so is there a corresponding reduction in resources required.

Previous experience (that is, what has been used before on earlier similar trips) is the best indicator of requirements in terms of variable resources.

This highlights the need for keeping accurate records of resource allocation as discussed in Element 3.

Practical considerations when meeting budget limitations

It is always necessary to:

- Meet contracted demand/promises – anything advertised for a tour must be delivered.

  Any clauses in a special contract must be filled.

  Special requests must be accommodated where participants have been advised they will be met.
- Ensure the standards and resources which applied to previous tours also apply to this/the next tours – this is the way the organisation builds its reputation, credibility and business.

  There must be consistency in what is delivered on all tours.
- Guarantee the safety of all tour group members – so resources must be sufficient to enable this or alternative action must be taken.

Alternative action might be to:

- Notify Tour Guide/Leader of the reduced (for example) equipment/PPE and advise either:
  - A reduction in the number of people who can participate at any one time
  - Borrowing additional items at the destination/attraction
- Advise tour prior to departure there has been a need to make a change to the advertised schedule/itinerary – and a substitute activity will need to be included so safety is not compromised by the reduction in necessary equipment.

- Consider adjusting resource allocation, where possible, to eliminate cost over-runs – this might be possible for example:
  - In terms of catering provisions – it might be possible to replace a higher-cost food/beverage item with a lower quality/brand option to help keep costs under control. This might have to be negotiated with Cooks etc. as it will be their job to provide the quality end-product the participants expect
  - By way of merchandise provided – where the tour company has not specified exactly what merchandise it supplies to group members it is nearly always possible to reduce quantity of items handed out or cost-shift by offering a lower-value item
- Search for the 'least worst' option – this means in situations where there is going to be a cost-overrun attention MUST be paid to seeking out the least expensive of all the negative options available.

  This highlights sometimes it is quite simply unavoidable to 'meet budget' for a tour so the second-best choice is the outcome which disadvantages the organisation the least.

  When deciding which options to choose in this scenario care must be taken to consider not only the strictly physical and financial implications of the choice made but also:
  - Potential for dissatisfied customers to sue/take legal action
  - Possibility of damage to the reputation/goodwill of the business

- Gain permission for budget over-runs where these simply cannot be avoided – while operators will generally give some degree of flexibility to workers in this regard (for example, staff might be allowed a nominated small percentage above-budget, or a given monetary amount) it is still SOP to request authority for 'substantial' extra expenditure.

  This request will usually need to be accompanied by rationale/reason for the increased costs so management/administrations can determine:
  - Whether the cost is worth it – or if it is more cost-effective to simply under-resource the tour and deal with whatever consequences might emerge as a result
  - If a review of the tour is necessary in terms of the type of activities/inclusions, tour group numbers and/or ticket prices.

  In some cases permission to exceed budget *now* might be accompanied by a demand to retrieve the financial outlay by making corresponding savings somewhere else at a later time/on a subsequent tour.

2.4 Provide resource information and support to colleagues

Introduction

Allocation of tour resources always carries with it a need to advise others about what information has been obtained, or about facts which currently apply to those resources.

This section looks at this notification and examines why it is an important aspect of the job.

Methods of notification

Commonly a variety/mix of options is used to notify others in regard to information about resource allocations to tours.

Advice is typically communicated:

- Face-to-face at daily staff meetings – held at the start of the day or shift
- To Tour Guides/Leaders when they return after a tour
- Via emails
- Using one of many popular hard-copy written formats – such as:
  - Specially-designed internal 'Resource Updates/Alerts'
  - A general-purpose Communications Book – located near the time sheets/time clock which all staff are required to read/sign when they arrive for work
  - Stock sheets – showing stock-on-hand
  - Loading sheets – showing items loaded onto vehicles
  - U/A sheets – showing stock/items which are unavailable because (for example) they are being repaired, serviced, replaced
- Using an electronic database with relevant files and fields – to show location of items at any point in time, for example:
  - In-stock – available and in the stores ready for use if required
  - Reserved – available but allocated to an upcoming tour on a certain day/s
  - O-O-O = Out Of Order – and reason for same with expected date of return to service/availability
  - On Tour = shows items being currently used and indicating:
    - Tour name/type
    - Date/time out
    - Date/time expected back in.

- Addressing all resource types – this means there will be a sharing of information about:
  - Physical resources – see above and immediately below

- Staffing – relating to availability of Guides, Leaders and other support staff
- Finances – advising about the budget position as it applies to resource acquisition/replacement
- Information – and the currency and comprehensiveness of same.

Importance of communicating information

Resource information needs to be communicated to:

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

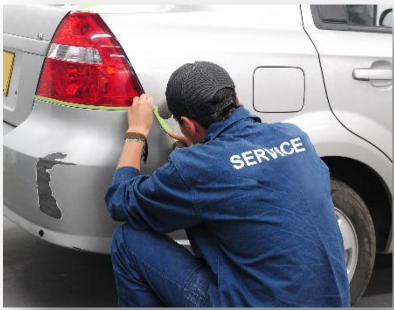
  - Verbal advice
  - Cautions and warnings regarding use of items, exclusion clauses, guarantees and warranties
  - Handouts and Fact Sheets
  - Manufacturer's information
  - User Instructions and Service/Repair Manuals
  - Operational Checklists developed specifically to support the use of nominated items to ensure their safe and optimum use
  - Demonstrations – combined with the opportunity for staff to practice using the items

  - New/revised SOPs and company polices – as required by changes in resource availability/type. For example, an absence of one type of resource might trigger activation of an established contingency plan

- Enable employees to pass on relevant information to tour group members about certain resources and/or specific aspects of certain resources – at pre-departure briefings, prior to activities and/or when on tour.

2.5 Issue the identified physical resources as identified

Introduction



Issuing identified physical resources means making the resources available as and when required according to pre-determined plans based on planning.

This section addresses the activities potentially involved in this phase and the documentation which might be used to support such activities.

Activities involved

Issuing physical resources can require:

- Separating the identified items from other stock available in the store area – so the required items are ready for trans[ort, distribution, hand-over or stowing as required
- Removing identified items from storage ready for use/collection
- Counting items – to ensure required number are provided
- Inspecting items – to verify safety, suitability and sufficiency
- Notifying tour staff to come and collect items from the store – in accordance with advice/loading sheets provided to them the previous day
- Driving tour vehicles to the store area – to facilitate loading the vehicles as required for the individual tour
- Loading items onto tour vehicles
- Stowing items in patrol boxes, tour wallets and other storage containers
- Refrigerating and freezing foodstuffs
- Rotating stock – which is usually done using the FIFO method of stock control where the first item taken into the store is the first one handed out when items are provided/distributed
- Spot cleaning – to items as required to maintain their appearance: even though items might have been cleaned prior to storage (or as part of their service/maintenance) it is always worth paying attention to the possible need to enhance appearances by a quick wipe/clean immediately on release

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

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

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

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

  This too must be avoided at all costs.

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

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

Documentation and records

A range of records might need to be completed when physical resources are issued.

These can include:

- Internal requisitions sheets – to support the taking of items from store to tours so administration can track their use for calculating financial performance of tours
- Internal transfer sheets – to reflect movement of stock/items from one tour/vehicle to another tour/vehicle (that is, the items has already been taken out of store and allocated to a tour/vehicle)
- Bin cards – showing:
  - Where items removed from stock have been allocated
  - When they were taken
  - How many were allocated
  - Who authorised their removal
  - Number/amount of remaining stock-on-hand
- Database files and fields – showing the actual movement of stock items matched against planned movement as contained in the 'stock management' function of the database for the particular tour type/name in question
- Checklists – which might be completed by the person issuing the items and/or the person taking delivery/receipt of them

  Checklists are required to:

  - Prove the listed items were delivered/supplied as listed

  - Verify the condition of the items – the person receiving the goods would refrain from signing for any sub-standard or deficient items (or they would be appropriately listed on the document as 'Missing' or 'Not Supplied'
  - Provide a basis for checking off items when the tour returns
- Receipts – to verify/prove cash, vouchers and similar (company credit cards, travellers' cheques, company authorisations) were given to Tour Guides/Leaders.

Note

It is important for everyone who signs for resources to understand that once they have signed for the items, they are assuming responsibility for them.

In effect, they are taking charge of everything they sign for and they become accountable for goods as soon as they sign for them.

It is likewise important for the person who *provides* the items to obtain these signatures as evidence they have disposed of all the resources correctly/legitimately.

2.6 Distribute physical resources to required locations

Introduction

In addition to providing tour resources at the tour organisation there can often be a need to distribute physical items to other locations.

This section explores this need.

Remote supply

Providing resources to a tour at a location other than the point of departure from the organisation is referred to as remote supplying.

Need for remote supply and items frequently involved

Remote supply might occur:

- At pre-determined times as identified during the planning phase
- In response to situations arising/emergencies – in responses to requests/messages from tour groups and the Guides/leaders.

It can be required to:

- Re-supply or replenish the tour stocks – as they are depleted through regular/normal use or because there has been some emergency or problem situation
- Deliver required resources to the tour group at a pre-arranged location at a pre-arranged time – such as:
  - Camping gear for overnight stays – which might need to be set-up as part of the provisioning process
  - Food and beverages for meals – which might include the need to prepare and serve the meals.

    Most tours provide their own 'refreshments' (or purchase them from third party providers) where a bus or 4WD is used, but for walking, animal-based tours or cycling tours there can be a need for snacks to also be provided.
  - Fuel and spare parts for vehicles – might also be a need to provide mechanical service to support this
  - Medical supplies – and first aid assistance

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

Transport options

Physical resources are distributed in one of the following ways:

- Using a vehicle belonging to the tour organisation – most businesses of this nature will retain:
  - A lorry
  - A van
  - A catering van/mobile kitchen
  - A variety of purpose-built trailers
- Using a third party carrier.

Related activities

When remote supplying items to a tour group the following activities are sometimes integrated into the supply process:

- Transporting other tour staff to the group – to swap staff/assist with staff change-overs
- Taking new tour group members to join the tour as a 'late arrival'
- Bringing back a wide variety of items – such as:
  - Damaged goods/property
  - Items no longer required by the tour group
  - Receipts and internal documentation (progress reports; daily reports), forms and sheets
- Bringing back tour group members who wish to leave the tour – or those who have been required to leave the tour by tour staff for unacceptable behaviour.

2.7 Arrange for third party supply of resources

Introduction

Many resources required by tours are arranged before the tour departs through local third party providers.

This section discusses this 'stock and supply' option looking at reasons third party providers are often used by tour companies/groups and discussing the various pre-tour arrangements which need to be undertaken in order to organise required third party provision.

Reasons to use third party providers

Third party providers are external businesses who supply goods and services on a fee-for-service basis.

They are often used by tour companies because:

- Using local providers is often more effective and operationally efficient than buying all requirements beforehand, carrying them and using them when needed – in many cases it is just physically impossible for a tour to carry all its own resources as there is just insufficient room or the added weight will cause additional expense or compromise ride safety or quality
- Resources bought on tour can often be less expensive than those purchased at the base of operations by the tour business – they might also be of better quality.

  This is often the case when it relates to perishable food items.
- They give 'local flavour' to the tour and add an extra dimension for tour group participants – for example, when they dine and sleep in local establishments they get to experience the local conditions, culture and hospitality on a first-hand basis
- Use of third party providers can add an element of luxury and indulgence to a tour – to give a break from what might be otherwise Spartan and difficult conditions
- These providers are the only local options for the provision of items such as:
  - Food and beverages
  - Activities and rides
  - Local transportation
  - Local guides
  - Local knowledge and advice.

- There might be a trade-off required by local operators or communities – for example, it might be a condition of entry to a community or area that:
  - Money is spent locally to help promote the economy
  - Local people are used to provide certain tour-related work to help create jobs and sustainable employment for the local population.

Pre-tour arrangements

When organising for the third party supply of resources to tour groups it might be necessary to undertake the following activities:

- Compare prices and quality available from a variety of local suppliers – in order to source the best product/s and the best deals
- Negotiate deals – in relation to issues such as discounts for cash or prompt payments, quantity discounts, loyalty bonuses
- Develop contracts/tender documentation – and posting them inviting local suppliers to tender for the contracts/supply of identified goods and services
- Organise lines of credit – so tour groups can make purchases as required and the costs can be charged back to the tour organisation
- Pre-pay for known items and quantities – it might be a condition of buying from a local business all items need to be paid for 'in advance' before they will be supplied
- Obtain vouchers or other documentation in advance – so relevant forms, tickets and coupons can be issued to Tour Leaders and tour group members for them to redeem for the provision of goods and services as required from local businesses/outlets
- Organise locations, dates and times – to suit the needs of the tour group and the operation of the supplier's business
- Contact local suppliers immediately prior to tour group departure – to confirm arrangements, verify availability of supply and update any last-minute requirements/changes to previous agreements.

2.8 Verify supply of appropriate and adequate resources with tour guide and other personnel

Introduction

All resources supplied to tours and tour personnel must be processed in accordance with individual organisational operational protocols.

This section explains why there is a need for such verification, identifies the people commonly involved and describes the basic process.

Why is there a need for verification?

Verification needs to occur for several reasons – to:

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

  This will be supplemented by 'Goods Returned' documentation for the majority of resources to complete the cycle on return of the tour.

  These documents are vital for administration/management to:

  - Calculate business performance statistics – in relation to:
    - Stock used
    - Costs
    - Return on investment
  - Form the basis of future tour-related decisions – such as:
    - Need to increase tour prices
    - Need to amend inclusions/activities incorporated as part of the tour
    - Future need for extra and/or different resources
    - Possible need to change suppliers and/or resources used.

Verification of third party provisions

There can also be a need to make sure the resources which were arranged through a third party supplier have actually been provided.

While immediate notification of failure to supply can be made via radio/phone it is common for the verification process in this regard to:

- Verbally confirm resources arranged were provided as ordered
- Identify items not provided – so alternatives can be organised and payment withheld (or claims made) for things not supplied
- Collect supporting documentation – such as signed dockets/receipts for forwarding to the accounts department for internal processing.

People commonly involved in the process

The people commonly involved are:

- Tour Leader – for most items but especially in relation to:
  - Cash
  - Vouchers/coupons
  - Travel documentation
  - Legal papers
- Cook/s – for food and beverages and cooking equipment
- Tour Guides – for equipment related to activities, tour merchandise, safety clothing and equipment
- Drivers – where fuel, spare parts and vehicle-related items need to be provided.

Details of the process

The most common verification involves:

- Physically inspecting items
- Counting items
- Comparing items provided against supply documentation – taking into account relevant characteristics of individual things which might relate to:
  - Brand name
  - Size/s
- Signing to acknowledge receipt of items received – and dating the re-supply sheet or appropriate internal document (requisition)
- Noting on the accompanying documents items not provided – and/or items rejected because they were damaged or otherwise unsuitable.

  Returned/rejected items need to be taken back to the tour organisation for formal processing/disposal and not simply 'thrown out'.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 For one of the tours used in your answer to Work Project 1.1 describe how you would allocate required resources providing descriptions of what you would do to:

- Coordinate availability of resources so the required resources are available when and as required
- Ensure resources supplied actually match identified requirements
- Make sure the issue/allocation of all resources falls within budget limitations imposed on the tour
- Provide relevant information to tour staff regarding resources allocated to the tour
- Issue the physical resources for the tour
- Physically distribute resources for the tour as required
- Use third party providers to supply resources/services to the tour group
- Verify the tour has been provided with all the required resources.

Summary

Allocate resources

When allocating resources:

- Coordinate availability of physical resources to optimise use and control cost
- Take action necessary to optimise resource use and allocation rather than ignore issues likely to negatively impact allocation and use
- Monitor tour schedules actively
- Monitor stock levels and resource use/allocation
- Keep accurate and comprehensive records
- Provide resource which match/reflect identified need for tours/groups
- Determine and adhere to budget limitations which apply
- Actively control stock movement and management
- Inform colleagues regarding resource availability, use and allocation
- Issue resources only as identified
- Maintain records of resources issued
- Ensure all stock movement is recorded and verified
- Use third party providers to supply/deliver resources as required/when optimal
- Communicate with others regarding suitability and need of tour resources.

Element 3:
Review resource allocation

3.1 Compare resources used with budget and revenue raised

Introduction

Businesses will always compare 'actual' use of resources for tours with projected/budgeted use.

This section discusses this requirement looking at the context of this activity and identifying reasons for doing the comparison.

Context

There can be a need for the person who *allocates* the resources to tours to also participate in activities related to *analysing the use* of those resources.

In most cases the statistics developed as part of this process will be generated by management/administration but the raw data which forms the basis of those calculations will be supplied by the person who handles the actual resource allocation.

In practice this means the person who allocates the resources will probably need to provide:

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

Reasons for doing the comparison

Reasons to undertake these calculations include to:

- Determine business performance – and the financial performance of individual tours and tour types: in essence, to ensure they are:
  - Generating the expected income
  - Not making a loss
  - Returning the profit they expect
- Provide a point of reference for comparing efficiency of resource usage between different staff members – to see who uses ‘the most’ and who uses ‘the least’
- Contrast different tour types against each other – to identify which tours/personnel are the best performers/most cost effective
- Decide whether or not:
  - There is a need to increase tour prices – to cover increased costs and/or to maintain an acceptable ROI
  - The price of a tour needs to increase – due to increases in resources/costs needed to provide the tour
  - A tour type needs to be removed from the tour options being advertised/provided – because it is not profitable enough
- Enable identification of ‘most’ and ‘least’ profitable tours – so the most profitable ones can be more actively promoted/pushed
- Try to identify future need – for money to buy future resources: this might indicate a need to manage cash flow or take other action (such as borrow funds) to enable required resources to be acquired
- Classify and quantify future physical resources required – so:
  - Suitable suppliers can be sourced
  - Best deals and prices can be negotiated
  - Items can be purchased and received before they are needed so items are available and ready for use when required.

3.2 Review actual conduct of tour and compare with expectations

Introduction

From time to-time those involved with resource allocations for tours will be required to assist in the review of tour operations comparing actual performance with expectations.

This section considers whose expectations might be considered, identifies reasons this review is undertaken and described activities which are involved in the process,

Expectations which might be considered

In this context 'expectations' or 'performance' is not related to financial or statistical performance of a tour.

'Expectations' refers to a combination of anticipated outcomes from the tour as judged by:

- Customers, tour group members and those who bought tickets for the tour – looking at factors such as:
  - What they were told they would receive from the tour (as described by promotional materials, advertisements and members of the staff of the tour company) compared to what they actually experienced
  - What they experienced last time they took this tour – compared to what they encountered this time
  - What they expected from the tour – based on other tours they have taken as provided by other tour operators
- Management and/or administration of the business – in terms of:
  - The items they anticipated would be required in order to conduct the tour – compared to what (with the benefit of hindsight) was actually needed/had to be used or provided
  - The extent to which the business was able to source/supply required resources from the existing inventory of stock – as distinct to having to purchase items specifically to enable/support the tour.

    This can be a significant consideration where companies are trying to use 'old' stock/items.
  - The extent to which resources could be multi-tasked – and used across a variety of different tours/tour types
- Tour staff and Tour Leaders – in relation to topics such as:
  - Sufficiency of items provided – in order to meet actual need/demand while on tour
  - Suitability of resources provided – to allow activities identified in advertisement and or listed on the itinerary to be conducted and provided properly and safely.

Reasons for the review

This style of review is often part of a standard review program undertaken across the entire organisation on a regular and ongoing basis.

The reviews are undertaken in order to:

- Determine level/degree of alignment between expectations and actual experience – for the above three groups
- Decide where and/or if changes need to be made to:
  - Advertisements and/or promotions
  - Tour inclusions and activities – and/or items to support them
- Identify if an unexpected/unique selling point has emerged – as, for example, in a situation where:
  - An alternate use for a resource is identified which can create a new opportunity for a tour or activity
  - A tour group member has made a positive comment about a tour/resources used which can be used in future promotions of the tour in the form of a quotation 'from a satisfied tour group member' or as an endorsement
- Evaluate the procedures used to design and develop tours – as this process will always include consideration of resources required to enable the tour to be conducted
- Validate other data – such as:
  - Results of market research findings
  - Feedback received from tour group members
  - Comments made by employees
  - Contents of internal documentation and reports.

Activities involved

This type of review and comparison will include:

- Soliciting feedback from tour group members – while they are on-tour and on completion of their tour
- Participating first-hand in a tour – taking a tour and seeing it through the eyes/experience of a tour group member
- Requiring tour staff to provide structured input – every time they complete a tour, such as by providing a formal verbal or written report
- Analysing incident reports – relating to events (accidents, injury, near misses) when on tour
- Reflecting on expectations – rather than being able to compare and analyse statistics this style of review will entail thoughtful consideration of what happened
- Drawing on other industry experiences and related knowledge – about similar tours, alternate choices, previous outcomes and results.

3.3 Identify resources that need to be revised for subsequent tours

Introduction

A major aim when reviewing resource allocation is the need to identify any resources which need to be revised/changed for future tours.

This section discusses the identification and acquisition process and explains what might occur in terms of the practical revision of resources and looks at why this is done.

The identification and acquisition process

The process of identifying and acquiring resources which need to be revised will need to reflect and accommodate the following procedures – it:

- Must flow from a structured review process – there must be an identified and actual need to revise the resources.

  In many cases there will be a need to present a valid rationale for the purchase/acquisition of new, different or additional resources.
- Has to occur within designated budget parameters – there are always limits regarding the amount of money which can be spent and these constraints will be imposed by management/administration
- Commonly requires specific authorisation – in most cases there needs to be specific permission verbally given to go ahead and make necessary purchases, or there will be a need to gain a signed 'authority' to proceed (such as a Purchase Order)
- Can require multiple quotations to be obtained for comparison purposes – before an order is placed.

  Many organisations require this where the value of resources to be purchased is above a designated value.
- Might require trialling of resources prior to purchase – this might entail a variety of activities which will vary depending on the nature of the resources but might include:
  - Testing items for the purpose they are intended – to determine performance and applicability
  - Viewing use of the resources in operation at other businesses and/or on other tours – to verify their suitability
- Generally requires that only a limited/maximum number (or value) of stock is acquired at any one time – in order to control the value of inventory so excess cash is not tied up in stock/resources
- Might require purchases are:
  - Made from designated suppliers only – known as 'preferred providers'
  - Bought before or after a certain date – to accommodate internal cash flow constraints
  - Lodged using a given purchasing protocol – such as online, using a sales representative, in-person, by telephone, via contract/tender process.

In practice all resource types (physical, financial, human, information – or a combination of same) might need to be changed.

Practical revision of resources

The actual revision of resources must reflect the identified need to make alterations to what was previously allocated.

In practice this could require:

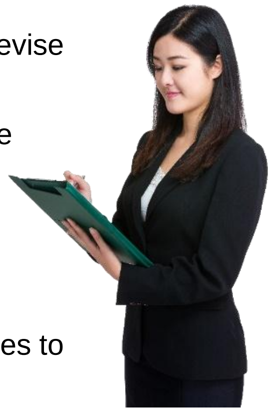
- Buying more of the same resources – to:
  - Meet identified increased demand
  - Replace items which have been stolen, damaged, discarded, lost or used
- Buying different brands/types of the same sort of resources – in effect this is the same as substituting items which might occur in order to:
  - Meet identified preferences for different brands/makes/models by tour group members
  - Reflect better deals the organisation has been able to negotiate with suppliers
  - Acquire a more efficient or effective resource option compared to what was previously being used
- Upgrading existing resources – which might mean:
  - Purchasing the same items but getting new ones – to enhance their appearance thereby maintaining the image of the business
  - Purchasing new versions/more recent models of existing/previous items – to give tour group members confidence in the quality of the resources being used/provided for tours
  - Purchasing specified items as required by legislation/authorities – to meet legally-imposed safety and other compliance regulations
- Buying new items never used before – so as to:
  - Support new tours, activities and inclusions planned for tours conducted by the company
  - Meet requests made by past customers about resources which would have increased their satisfaction level with tours they took
  - Address upcoming identified need for special tours which have been requested/agreed to – these are ‘special event’ (or ‘one-off’) tours with specific and unique needs.

For acquisition of large value resources (such as vehicles, plane and machinery) the business might elect not to purchase items outright but might choose to use an alternate acquisition method such as:

- Renting
- Leasing.

3.4 Revise standard tour-related documentation

Introduction



Following the resource review process there can often be a need to revise standard tour- related documentation.

This section identifies examples of documents which might need to be altered and discusses the nature of the changes which might need to occur.

Documents which might need to change

There can be a need to change the following documents when changes to tour resources have been made:

- Advertising material aimed at the general public/customers – such as:
  - Brochures and flyers
  - Media advertisements
  - Static signage/posters
  - Websites

  These documents will need to change to reflect any substantial changes which materially alter the type or nature of the trip being advertised.

  These documents are not changed where minor/insignificant alterations occur because the expense involved in generating new advertisements/advertising materials is generally prohibitive – the key is promotional material must remain 'truthful' and never be deliberately 'misleading'.
- Internal information documentation provided to:
  - Employees/sales staff – to assist them provide information to customers
  - Joint venture partners and/or other agencies – to advise them of changes so they are aware of what is happening.

  Internal employees need to know about the changes so they can accurately and professionally communicate these new arrangements to others/potential customers
- Tour itineraries – altering (as appropriate on the basis of the review):
  - Departure times and date
  - Travel methods/type/carrier
  - Travel times
  - Durations
  - Arrival times at destinations and events
  - Departure times from destinations and events
  - Points of interest
  - Accommodation details
  - Catering details
  - Inclusions

- Tour schedules – the sheets which list:
  - Types of tours
  - Days they run
  - Times
  - Prices
  - Inclusions
  - Booking details
- Tour checklists – the sheets/forms used to list and quantify resources allocated to standard tours to ensure all required items are supplied.

  These might need to be changed in terms of:
  - Adding or removing stock items
  - Changing type of items (but leaving quantity the same)
- Tour resource stock sheets – such as
  - Inventory sheets
  - Bin cards
  - Stock-take sheets.

  Changes might need to address:
  - Adding or removing stock items from the list of stock-on-hand
  - Changing type of items kept in stock
- Duty allocations and rosters – in some cases there can be a need to update staffing-related documents where new resources require:
  - Additional/different roles and responsibilities for staff
  - More time to undertake traditional tasks as a result of using new/different resources
  - Additional training of staff to gain competency in the use of the resources
  - Licensing requirements as imposed by certain agencies/authorities
- Plans including emergency responses – to reflect the role/use of the new or revised resources.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

3.1 For one of the tours used in your answer to Work Project 1.1 describe how you might review resource allocation for the tour providing details about:

- The way actual resource use might be determined
- Reasons there is a need to compare actual use against budgeted/projected use
- How the actual conduct of the tour might be reviewed and compared with management and tour group member expectations
- Resources which might need to be revised listing possible reasons these resources would need to be revised
- The tour-related documentation which might need to be updated identifying how and why those documents would need to be changed.

Summary

Review resource allocation

When reviewing resource allocation:

- Use a combination of information
- Use facts, figures and records as one source of information
- Supplement statistics with feedback from tour group members and staff
- Base decisions for change on verifiable evidence
- Undertake reviews on an ongoing and regular basis
- Ensure reviews are structured
- Judge and assess actual provision of tours against projections, expectations and budgets
- Realise changes might need to occur to physical, financial, human and/or information resources
- Changes to resources might mean increasing, reducing or altering them in some way
- Update all tour-related documentation to reflect changes made to resources.

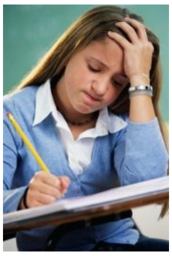
Presentation of written work

Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

Style

Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:



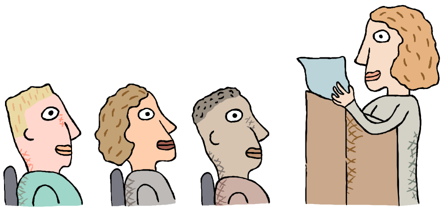
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

Presenting Written Work

Types of written work

Students might be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	*Humankind*
Barman/maid	*Bar attendant*
Host/hostess	*Host*
Waiter/waitress	*Waiter or waiting staff*

Recommended reading

Note: all Recommended Reading is sourced from 'Trove: National Library of Australia' at http://trove.nla.gov.au/.

Cole, Jo & Adelaide Institute of TAFE & South Australia. Dept. of Further Education, Employment, Science and Technology 2000, *Coordinating and operating a tour*, Adelaide Institute of TAFE, Adelaide, S. Aust.

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Trainee evaluation sheet

Allocate tour resources

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	☐	☐	☐	☐
Most of the competency seemed relevant to me.	☐	☐	☐	☐
The competency was at the right level for me.	☐	☐	☐	☐
I got enough help from my trainer.	☐	☐	☐	☐
The amount of activities was sufficient.	☐	☐	☐	☐
The competency allowed me to use my own initiative.	☐	☐	☐	☐
My training was well-organised.	☐	☐	☐	☐
My trainer had time to answer my questions.	☐	☐	☐	☐
I understood how I was going to be assessed.	☐	☐	☐	☐
I was given enough time to practice.	☐	☐	☐	☐
My trainer feedback was useful.	☐	☐	☐	☐
Enough equipment was available and it worked well.	☐	☐	☐	☐
The activities were too hard for me.	☐	☐	☐	☐

The best things about this unit were:

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The worst things about this unit were:

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The things you should change in this unit are:

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Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

Allocate tour resources

		Yes	No*
Element 1: Determine resource requirements			
1.1	Identify the factors that will determine resource requirements for a tour	☐	☐
1.2	Discuss resource needs with colleagues	☐	☐
1.3	Consider previous tours that have been conducted	☐	☐
1.4	Identify safety and legal issues that must be complied with	☐	☐
1.5	Determine availability of required resources	☐	☐
1.6	Identify specific resources for individual tours	☐	☐
1.7	Prepare short and long-term plans for resource acquisition	☐	☐
Element 2: Allocate resources			
2.1	Coordinate the availability of physical resources	☐	☐
2.2	Match resources to identified tour requirements	☐	☐
2.3	Comply with budget limitations when allocating resources	☐	☐
2.4	Provide resource information and support to colleagues	☐	☐
2.5	Issue the identified physical resources as identified	☐	☐
2.6	Distribute physical resources to required locations	☐	☐
2.7	Arrange for third party supply of resources	☐	☐
2.8	Verify supply of appropriate and adequate resources with tour guide and other personnel	☐	☐
Element 3: Review resource allocation			
3.1	Compare resources used with budget and revenue raised	☐	☐
3.2	Review actual conduct of tour and compare with expectations	☐	☐
3.3	Identify resources that need to be revised for subsequent tours	☐	☐
3.4	Revise standard tour-related documentation	☐	☐

Statement by Trainee:

I believe I am ready to be assessed on the following as indicated above:

Signed: ______________________________ **Date:** ____________

Note:

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.

William Angliss Institute

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