Conduct interpretive activities in the field

D2.TTG.CL3.03

Trainee Manual

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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

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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 may 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 trainee 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 may 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 may 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

Conduct interpretive activities in the field

This unit deals with the skills and knowledge required to Conduct interpretive activities in the field in a range of settings within the tour industries workplace context.

Unit Code:

D2.TTG.CL3.03

Nominal Hours:

80

Element 1: Make on-tour preparations

Performance Criteria

    1.1 Implement interpretive activity plans

    1.2 Schedule the interpretive activity

    1.3 Prepare on-tour requirements to support the interpretive activity

    1.4 Confirm operational details with colleagues

    1.5 Ensure safety issues have been addressed

    1.6 Provide for maximum engagement by customers

Element 2: Introduce the interpretive activity

Performance Criteria

    2.1 Alert people to the up-coming interpretive activity

    2.2 Welcome customers to the interpretive activity

    2.3 Explain the interpretive activity

    2.4 Demonstrate necessary pre-requisites for the activity

    2.5 Confirm customer understanding regarding the up-coming activity

Element 3: Conduct the interpretive activity

Performance Criteria

3.1 Assemble tour group as required

3.2 Provide commentary and interpretive presentation techniques

3.3 Apply appropriate interpersonal skills

3.4 Use prepared aids and materials and equipment to support presentation

3.5 Encourage audience participation, where appropriate

3.6 Respond to questions

3.7 Respect environmental, cultural and social sensitivities

3.8 Adjust presentation to suit emerging requirements

3.9 Liaise with colleagues throughout the activity

3.10 Deal with unexpected events

3.11 Complete the activity

Element 4: Review the interpretive activity

Performance Criteria

4.1 De-brief with colleagues

4.2 Seek feedback from customers

4.3 Evaluate actual performance against target performance criteria for the activity

4.4 Revise operations on the basis of the review data

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 may 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:	**Make on-tour preparations**			
1.1	Implement interpretive activity plans	1.1	1, 2	1
1.2	Schedule the interpretive activity	1.1	3, 4	2
1.3	Prepare on-tour requirements to support the interpretive activity	1.1	5 – 8	3
1.4	Confirm operational details with colleagues	1.1	9	4
1.5	Ensure safety issues have been addressed	1.1	10, 11	5
1.6	Provide for maximum engagement by customers	1.1	12	6
Element 2:	**Introduce the interpretive activity**			
2.1	Alert people to the up-coming interpretive activity	2.1	13, 14	7
2.2	Welcome customers to the interpretive activity	2.1	15	8
2.3	Explain the interpretive activity	2.1	16	9
2.4	Demonstrate necessary pre-requisites for the activity	2.1	17 – 20	10
2.5	Confirm customer understanding regarding the up-coming activity	2.1	21, 22	11
Element 3:	**Conduct the interpretive activity**			
3.1	Assemble tour group as required	3.1	23	12
3.2	Provide commentary and interpretive presentation techniques	3.1	24, 25, 26	13

		Work Projects	Written Questions	Oral Questions
3.3	Apply appropriate interpersonal skills	3.1	27 – 30	14
3.4	Use prepared aids and materials and equipment to support presentation	3.1	31, 32, 33	15
3.5	Encourage audience participation, where appropriate	3.1	34, 35, 36	16
3.6	Respond to questions	3.1	37, 38	17
3.7	Respect environmental, cultural and social sensitivities	3.1	39, 40, 41	18
3.8	Adjust presentation to suit emerging requirements	3.1	42, 43	19
3.9	Liaise with colleagues throughout the activity	3.1	44	20
3.10	Deal with unexpected events	3.1	45, 46	21
3.11	Complete the activity	3.1	47, 48, 49	22
Element 4: Review the interpretive activity				
4.1	De-brief with colleagues	4.1	50, 51	23
4.2	Seek feedback from customers	4.1	52, 53	24
4.3	Evaluate actual performance against target performance criteria for the activity	4.1	54	25
4.4	Revise operations on the basis of the review data	4.1	55	26

Glossary

Term	Explanation
360˚ feedback	Feedback from everywhere/all stakeholders (all points of the compass)
Contingency plan	Plan B: a plan showing what is to be done when the standard operational plan/itinerary cannot be implemented.
Custom tour	Tours customised on a one-off basis to meet the needs of an individual client (same as private 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
Fauna	Animals and wildlife
Flora	Plants and flowers
Inclusions	Things included on/with a tour
Itinerary	A schedule for a tour showing what tour group members will be doing, where they will be going, and the times for each activity
KPI	Key Performance Indicator
PA	Public Address (system)
PPE	Personal protective equipment (and clothing)
Private tour	Tours developed for a private client designed just to meet their specific needs (same as custom tour)
Prop kit	Kit prepared by a Tour Guide containing props to assist with pre-prepared presentations throughout the tour at pre-determined times/sites
QA	Quality Assurance
SOP	Standard Operating Procedure
Scheduled tour	A normal/regular tour advertised to the general public and provided on an 'as is' basis" see also Standard tour

Term	Explanation
Scripted commentary	Prepared/written script to be used when providing a tour commentary
Standard tour	Another term for a 'Scheduled tour'
Tour brief	A formal document provided by the employer to provide an overview and details of the tour
Tour report	Document completed at the end of a tour providing required details of the tour as requested by the Tour Operator
Quantitative information	Statistical information
Qualitative information	Descriptive content
VIP	Very Important Person

Element 1:
Make on-tour preparations

1.1 Implement interpretive activity plans

Introduction

All interpretive activities must be implemented according to the approved plans which were prepared for them.

This section provides a context for the unit, refreshes knowledge regarding the concept of interpretive guiding, identifies and discusses seven questions relating to the understanding of interpretive activities which underpins effective implementation of them and presents standard ways Tour Guides can determine content of relevant interpretive activity plans.

Context for the unit

This unit deals with skills and knowledge required to deliver interpretive activities to groups and individual on tour.

It does not include the pre-tour research, planning and preparation required to precede the presentation of an interpretive activity in the field.

These topics are addressed in the unit 'Plan, develop and evaluate interpretive activities'.

Concept of interpretive guiding

Interpretive guiding can be seen as the use of interpretive activities and presentation techniques by a Tour Guide when leading/presenting a tour.

Their use makes a tour for participants a much more memorable experience.

Interpretive guiding goes beyond the basic provision of information which is seen by many as their sole objective when conducting a tour.

Interpretive guiding refers to the use of interpretive activities and techniques to interpret the topics/areas which are the focus of the tour or encountered along the way.

In many ways interpretive guiding seeks to make people care about, and care for, topics and subjects which are the focus of interpretive activities.

Website

It is worth visiting the sites below to refresh personal knowledge regarding Interpretive Guiding:

http://www.nps.gov/idp/interp/101/foundationscurriculum.pdf pp 3 - 4 - Foundations of Interpretation: curriculum, content, narrative NPS – Interpretive Development Program: Professional standards for learning and Performance' (National Parks Service, US Department of the Interior)

http://www.nps.gov/idp/interp/101/processmodel.pdf - The interpretive process model (National Parks Service, US Department of the Interior).

Need to understand interpretive activity plans

Understanding interpretive activity plans is the basis of implementing interpretive activity plans.

In practice there is a need for Tour Guides to obtain answers to seven very important questions:

1. Why is the interpretive activity being conducted?

2. When is the interpretive activity to be presented?

3. Where is the interpretive activity to be conducted?

4. Who is involved in the activity?

5. How is the interpretive activity to be conducted/presented?

6. What resources are available to deliver the interpretive activity?

7. Have necessary permissions to conduct the activity been obtained?

Note: more information on these topics is provided below and also in the unit previously identified 'Plan, develop and evaluate interpretive activities'.

Why is the interpretive activity being conducted?

Individual nature of tours and planning

When plans were prepared for interpretive activities they traditionally need to take into account a range of different considerations.

The exact type/nature of considerations will:

- Vary between tours – as the focus and advertised/required content for the tours require

- Alter over time and/or as the year progresses – to accommodate seasonal influences and changes

- Be different for different tour groups/customers – to reflect any identified special needs/requests.

Generic issues

Tour Guides need to understand why the tour is being conducted in order to:

- Place the tour to be conducted into its true context – by putting the tour, inclusions and interpretive activities into perspective as this applies to the individual tour

    A primary requirement here is to determine if the tour is:

    - A private/custom tour – see immediately below

    - A standard/scheduled tour – see immediately below

- Optimise likelihood of meeting customer expectations – in relation to:

    - Special requests made by customers in relation to the tour – some (but not all) Tour Operators will accommodate certain special requests if they are cost neutral and if they can be fitted in to the time constraints of the itinerary

    - Inclusions which have been promoted as being part of the tour – in advertisements for the tour as presented in the media, tour brochures and other promotional materials

- Accommodate feedback received – from:

    - Previous tour group members – on the basis of:

        – Formal written feedback received

        – Issues raised during the end-of-tour discussion which should be standard for every Tour Group to have with their tour group

        – Staff who have conducted the interpretive activity on previous occasions

        – The local/host community

- Discharge legal obligations – as imposed by:

    - Contracts for the tour which have been developed/entered into

    - Legislation relating to false advertising

- Identify subjects which may be the focus of interpretive guiding/activities- which may include:

    - Flora and fauna

    - Domestic and farm animals

    - History and heritage

    - Culture, arts and entertainment

    - Sport and recreation

    - The general natural environment

    - The built environment

    - Festivals, seasons and religious observances.

Private/custom tours

Private/custom tours are tours which are:

- Developed under contract with a client (individual or group)
- Customised on a one-off basis – in terms of:
  - Focus
  - Interpretive activities
  - Commentary
  - Itinerary
  - Cost
  - Inclusions
- Designed specifically and totally to meet the stated/identified needs of the individual client
- Run at a time and date determined by the client
- Planned and prepared/organised on a tour-by-tour basis.

Implementation requirements

Implementation requirements for private/custom tours:

- May be *based on* implementation requirements for standard tours – planning of these tours may have been based around a standard tour for the purposes of efficiency or because scheduled tours cover/address much of the requirements for the private tour
- Will often be unique in nature – given the one-off nature of these tours
- Can often require contact with the client to:
  - Confirm requirements
  - Clarify issues.

Standard/scheduled tour

A standard/scheduled tour (also known as a 'regular' tour):

- Is the normal tour advertised generally by the company
- Is available to all/members of the public
- Is the type of tour most people take
- Operates using the same itinerary every time
- Features the same interpretive activities, inclusions and scripted commentary every time
- Is essentially the same tour for all tour group members, time-after-time – subject to seasonal changes and other foreseeable and unforeseeable factors.

Implementation requirements

Implementation requirements for standard/scheduled tours:

- Is standard – in terms of:
    - Preparing required resources
    - Checking usual lists and documentation
    - Ensuring the same tour delivered *previously* is replicated *this time* to maintain quality and consistency of delivery

- May require checking to determine if any special requests have been made – and/or are approved or are required by management

- May require adjustment – to accommodate the changes (to route, commentary, inclusions, interpretive activities) brought about by seasonal factors.

Theme and message

Before starting a tour the Tour Guide needs to know about any identified, required or promised themes and messages that tour group members are expecting from the tour as this impacts significantly on how an interpretive activity will be presented.

Important points to note regarding 'theme and message' are:

- The terms 'message' and 'theme' are often used interchangeably but do have separate meanings

- A 'message' (sometimes more properly known as an 'interpretive message') is an uncomplicated stand-alone but important statement which makes sense on its own but nonetheless underpins and supports the theme for an activity – for example, 'Modern civilisation can cause adverse impacts on local communities'

- The 'theme' for the activity (or the tour) is often referred to as 'the take home message' for the visitors – the use of the word 'message' in this commonly used definition is partly responsible for the confusion that exists regarding distinction between the two terms

- The take home message is one, big idea that the tour/activity wants people to leave with/thinking about

- There is no limit to the exact nature of the 'messages and themes' which may be developed

- 'Messages and themes' may be seen as the story-lines for activities

- They flow from the 'topic', title or focus for the tour

- There may be a single message or theme, or multiple story-lines, attached to/included as part of an interpretive activity.

Website

More information on themes and messages for tours can be obtained from:

http://www.parks.ca.gov/pages/735/files/InterpPlanningWorkbookWEB2013.pdf - Interpretation Planning Workbook (California State Parks, 2013

When is the interpretive activity to be presented?

The Tour Guide must view the tour itinerary (both the operational and customer versions – to ensure they are in accordance with each other) in order to:

- Get a general impression of the overall content of the tour – with reference to:

  - Complexity

  - How inclusions and interpretive activities 'flow' and fit/integrate with each other given the context of the tour and the type of tour being conducted

  - Any other relevant issues generated by local conditions, traffic, weather or any other factors likely to impact timing-related issues – such as matters likely to:

    – Slow travel times

    – Delay provision of services by other parties

    – Hinder activities of tour group members

- Identify start time for the tour – the time the tour departs

  It is important for all tours to start 'on time' so:

  - The timing of all tour activities and inclusions can be adhered to

  - Arrangements made with other/support third party providers (shops, carriers, entertainers, co-workers, catering) can be honoured – by having tour groups at a given location by a given time

- Identify finish time for the tour – the tour must return 'on time' because:

  - There may be a need for the Tour Guide to take another tour at a scheduled/advertised time which is shortly after the return time of the first tour

  - Tour group members may be expecting to return at a set time and have made arrangements to do other things based on this knowledge/expectation

  - Failure to return 'on time' mat raise unacceptable labour cost issues

- Determine timing requirements in relation to the overall tour – with specific attention paid to individual interpretive activities in terms of their:

  - Sequence in the itinerary – that is, noting how many activities there are and which ones are first, second and so on

  - When each one is scheduled to start

  - When each activity is time-tabled to finish

  - Alternates – that is, identification of possible alternate activities which are provided for (and have been trialled, tested and appropriately approved and resourced) in case the scheduled interpretive activity cannot be presented.

More information on 'scheduling' interpretive activities is presented in the next section.

Where is the interpretive activity to be conducted?

Before the tour departs the Tour Guide needs to find out where each interpretive activity is to be conducted.

Common options are:

- Within the Tour Operator building – such as in a purpose built room designed and fitted out to accommodate basic/standard 'training' type activities

  This room traditionally has tables and chairs, room to move, communication technologies (such as slides, PowerPoint data projectors, DVD player and monitors/screens, microphones, sound systems)

  This location may be used for:

  - Pre-tour briefings and distribution of standard tour-related handouts/materials

  - Activities designed to get tour group members to know each other

  - Pre-tour interpretive activities such as workshops, demonstrations, interactive group activities, brainstorming, group discussion, lecture-type presentation, screening of films/DVDs and slides

- On-site locations – where interpretive activities are conducted which may be:

  - In designated outside locations – that is, in the 'open air' but at no particular site

  - At a particular natural site – such as a waterfall, valley, river, viewing point

  - Within a built structure at a destination – such as within a museum, at a theme park, in a room at a shop or an attraction, at a sports complex

  - In a local/host community – where arrangements and agreement have been made with them to host and engage with tourists

- On the tour group vehicle – the tour group vehicle is often used for discussions, story-telling, reading handouts, handling (sensory awareness of) materials, lectures, playing games, conducting quizzes, and delivery of scripted commentary

  Use of the tour group vehicle as a location for some interpretive activities is common and:

  - Means many vehicles are equipped with supporting technology to facilitate the activities

  - Provides activity for tour group members on what can be, otherwise, long and potentially boring travel times – to and from destinations.

Knowing the location of each interpretive activity is important because:

- This knowledge helps provide a mental context for the Tour Guide – it helps the Guides get a feel for the tour and orient the tour locations in their mind

- It generates mental impressions regarding travel times to destinations for the activities

- Creates an *overall* impression of what is to be provided – through setting each activity into its individual location and setting.

Who is involved in the activity?

All interpretive activity plans will specify the personnel involved in an activity.

Those who may be involved can include:

- Others from within the Tour Operator's business – such as:
  - Other Tour Guides
  - General assistants
  - Topic/subject presenters or experts
  - Chefs/cooks
  - Vehicle drivers
  - Translators
  - Security staff
  - Safety officers
- Members of local/host communities – who:
  - Can be involved in tour guiding roles within their community
  - May lead/conduct certain interpretive activities such as dance, demonstrations, cooking, artwork, story-telling and song
- Specialist personnel from third party providers/organisations – who may provide on-site and/or on-tour.

The Tour Guide needs to know:

- Exactly who and how many will be involved with them on the tour and as part of the tour crew
- Roles and responsibilities allocated to each person
- How their own role integrates with the services to be provided by 'other personnel' who are also part of the tour and the interpretive activities to be conducted.

How is the interpretive activity to be conducted/presented?

The plans for the scheduled interpretive activities will detail how each activity is to be conducted.

The Tour Guide will have to obtain instruction/direction from the pre-prepared plans in relation to:

- Interpretive techniques to be used
- Tour and activity communication
- Safety and security issues.

Interpretive techniques to be used

Interpretive techniques are ways of communicating information to visitors/tour groups.

Interpretive guiding commonly uses face-to-face methods and is frequently supported by interpretive media/aids.

The plans will indicate which option will be used to engage tour group members with every required interpretive activity – the commonly used options include:

- Role playing

- Using different voice techniques

- Story-telling

- Playing of games

- Conducting activities

- Presenting demonstrations

- Delivering participant interaction situations

- Holding sensory awareness exercises

- Using materials to enhance illustration and experiences

- Utilising technology to assist with delivery

- Identifying further links where interested participants can find more information if they want to – when the tour has concluded.

Tour and activity communication

In this regard Tour Guides need to look at the plans to:

- Identify the communication equipment/facilities available and/or required to help delivery of activity information – this may relate to:

    - On-site equipment – such as systems and technology available at head office and various destinations which will be used as the basis for an activity

    - Communication equipment available on tour vehicles

    - Portable PA systems

    - Laser light pointers

    - Need for portable equipment – such as megaphones or individual 'personal audio facilities' to support self-tours by participants at destinations

- Determine communication devices to be taken/used by tour staff – which may include:

    - Hand-held walkie-talkies

    - Vehicle-based two-way radios

    - Cell phones

    - Pagers

- Identify the commentary for the tour and each interpretive activity – these:

    - Are generally standard 'scripted commentaries' (for standard/scheduled tours) – which contain required detail for every tour and activity

    - May need to be individually developed for private/custom tours

    - Often require the addition of supplementary commentary in order to:

    - Cater for special requests and seasonal factors

    - Accommodate unexpected interruptions or the need to alter planned activities and inclusions

    - Suit the particular requirements of private/custom tours.

Safety and security

All Tour Guides need to ensure they discharge the legal 'Duty of Care' imposed on them/the Tour Operator for every tour and every interpretive activity.

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 while they are on tour and/or participating in an interpretive activity.

For a Tour Guide this means they need to read the plans which have been prepared to:

- Become familiar with the risk management plans developed for the tour and for each activity

- Gain familiarity with and a thorough understanding of all applicable risk control measures which are required to be implemented

- Ensure all resources necessary to support and implement the required risk controls are loaded onto the tour group vehicle/s or otherwise taken or available for the trip/activities

- Check the equipment and/or tour arrangements provide sufficient security to safeguard the staff and people on the tour/participating in interpretive activities and protect all physical assets.

What resources are available to deliver the interpretive activity?

Tour Guides must read the tour plans to identify the resources (by type and amount) which have been allocated for the tour and for each interpretive activity.

All tours and every activity will have been analysed and subjected to identification and quantification of:

- Human resources – these are the people will are available to provide assistance/services to the tour and the activities

  There will always be specification relating to:

  - Staff numbers

  - Hours available to each staff member

  - Total staff wages for the tour including payments to external providers of services

- Physical resources – this relates to the items, materials, products, goods and equipment allocated to each tour and activity

  - An analysis of requirements relating to physical resources will have been done as part of the planning process and this will have resulted in the development of 'Loading Sheets' for each tour and/or interpretive activity

  - The Loading Sheets specify by type and quantity all the resources which the Tour Guide must take on the tour

- All the identified resources need to be taken but no additional items can be taken unless management agrees

- The Tour Guide may be responsible for:

  - Physically loading these items onto tour group vehicles

  - Checking others have correctly loaded the required supplies.

- Financial resources – the Tour Guide must:

  - Determine the budgets applicable to the tour and (where applicable) to each interpretive activity – there is a non-negotiable requirement all tours and activities must be accomplished/delivered within the allocated budgets

  - Identify and obtain the cash they need to take with them when they depart – this money:

    - May be in local or other currency

    - Can be used to purchase items, equipment and services while on tour

    - Is used to pay entry fees

    - May be used to pay members of local/host communities for their participation in activities

  - Identify and obtain non-cash payment requisites – such as:

    - Credit cards

    - Letters authorising purchase on behalf of the Tour Operator.

Identifying resources required and/or available is necessary for the Tour Guide to:

- Allow cross-checking of what is required against what is available to support/enable it

- Become aware of the financial parameters for the tour and each activity and thus be able to operate the tour and the activities within budget

- Make sure all required resources have been loaded/stowed before the tour departs.

Have necessary permissions been obtained?

The final questions to be looked at by the Tour Guide relate to permissions and authorisations for the tour and for each activity.

This may require:

- Sighting written evidence management has authorised the tour and the activities t be implemented as described in the plans according to the resources identified/available – or obtaining face-to-face authorisation from management

- Verifying permits have been obtained allowing entry to certain areas – where these are necessary

- Making sure there is respect for indigenous people by checking to see local/host communities have agreed to (as appropriate).

- Confirming the requirements of all applicable 'other requirements' have been/will be met – these considerations may relate to:
  - Compliance with agreed Codes of Conduct with local/host communities
  - Alignment with Codes of Practice developed by industry bodies/associations to which the Tour Operator belongs/subscribes
  - Requirements imposed by the QA scheme used by the Operator.

Ways to gain planning-related tour knowledge

The standard ways in which a Tour Guide can become aware of the planning considerations for a tour are:

- Read tour files – and any planning documentation generated as part of the planning process for the tour
- Read the Tour Brief
- Read advertisements relating to the tour
- Speak to management
- Talk to those who prepared/developed or created the tour
- Talk to other Tour Guides who conduct the tours
- Talk to the person/s within the organisations who negotiated the contract for each private/custom tour – to identify their specific requirements
- Take standard/scheduled tour as a tour group member/paying customer – to gain an appreciation of what is required.

1.2 Schedule the interpretive activity

Introduction

When there is a total appreciation of the planning considerations for the tour and the interpretive activities, Tour Guides can turn their attention to scheduling each interpretive activity.

This section discusses pre-planning needs, examines 'issues arising' during the conduct of the tour and looks at allied issues that impact on, or flow from, timing of activities.

Pre-planning needs

Before implementing a planned interpretive activity there is a need for the Tour Guide to consider pre-planning needs.

These needs will vary between the different types of activities which are to be presented so with this in mind consideration of pre-planning needs may embrace:

- Consideration of the timing – to ensure:
    - The activity is going to be delivered in accordance with the itinerary
    - Confirmation of the duration of the activity to be presented – which means determining the finish time for the activity
    - Other activities and inclusions for the tour can be delivered as advertised/promised
    - Variations to planned timing needs to be made to accommodate/respond to issues arising on tour
    - Local/host communities are ready to receive the tour group and/or begin their participation in/engagement with the interpretive activity
- Consideration of the weather – to:
    - Make sure it is safe to conduct the activity given the weather conditions which exist at the time
    - Verify appropriate resources are available to suit the weather conditions which apply at the time
    - Decide if an alternative interpretive activity needs to be presented instead of the original, planned activity
    - Determine if the interpretive activity needs to be cancelled due to adverse weather conditions
- Consideration of the physical resources – to verify:
    - Correct/required resources are available to allow the planned interpretive activity to be delivered
    - Sufficient resources are available and ready to use
    - The available resources are safe to use
    - Resources advertised as being available are ready to be used and/or distributed to tour group members

- The security of resources to be used and those which are to be left on the tour vehicle
- Equipment and items provided by third party providers are safe and suitable for the activity to be conducted

- Consideration of the personnel – to ensure:

  - All tour staff understand their role and responsibilities in relation to the interpretive activity

  - Staff are ready to start the activity

  - The Tour Guide or the person(s) who will lead/conduct or present the activity is ready to start

  - Members of the local/host community are ready to play their part

- Consideration of the customers/tour group members – to:

  - Determine their readiness to engage with the interpretive activity

  - Calculate when and where relevant information about the activity will be communicated to/shared with them

  - Determine their physical, mental and/or attitudinal capacity or potential to safely engage with the activity

  - Identify any special requests or requirements which they have made regarding the activity and/or their engagement with it

- Consideration of the physical environment – to:

  - Verify the location in which the interpretive activity is to be conducted

  - Check the safety and suitability of the location

  - Confirm the physical environment reflects the physical environment used when the risk management/planning for the activity was undertaken

  - Demonstrate respect for indigenous people and local communities

  - Take action to minimise the impact of the interpretive activity on the physical environment.

Issues arising

All Tour Guides need to consider 'issues arising' during the conduct of the tour when they schedule an interpretive activity.

Examples of issues arising can be:

- Previous interpretive activities running over time and leaving less time for the next activity
- Previous interpretive activities running under time thus leaving more/extra time for the next activity
- Need to cancel or in some way amend an interpretive activity because of safety, weather or other reasons
- Requests/demands from tour group members for certain things to be done, changed or omitted from the itinerary
- Unacceptable behaviour and/or attitudes demonstrated by certain tour group members

- Accidents and/or incidents which have occurred when the tour group participated in a previous interpretive activity
- Vehicle breakdown and/or road closures which have caused delays to the itinerary
- Sickness of tour group members or involvement of participants in an accident of some sort.

Reasons Tour Guides need to consider these issues are to give them time to plan possible action/requirements:

- To adjust timing of the activity to maintain the itinerary times/schedule
- To adjust activities to accommodate the requests and/or competency level of tour group members
- To notify other personnel regarding the issues arising and their impact/how they will impact the upcoming interpretive activity
- To integrate new learning/experiences into an activity because that learning/experience was unable to be delivered in a previous activity that was cancelled or cut short
- To make sure respect for local/host communities is maintained – for example, where a decision may be made to cancel an activity/visit due to unacceptable behaviour/attitudes of a tour group
- To optimise the safety of tour group members with reference to whatever issue is deemed to be potentially impacting them.

Allied issues

In this context, allied issues are deemed to be issues which impact on, or flow from, timing of the activity.

Consideration in relation to scheduling therefore may need to address topics such as:

- Keeping the tour on schedule according to the itinerary by (for example) making up time by reducing the duration of *this* activity – because the previous one ran over time
- Ensuring budgetary constraints are always met – which means there is never a situation where a Tour Guide can do 'whatever it takes' to resolve or retrieve a situation
- Cancelling a scheduled interpretive activity – on the basis of insufficient time or because of the fitness level and/or physical capacity of tour group members
- Changing the commentary – so it addresses the changed circumstances and/or activities for the tour
- Checking to make sure a *delayed* interpretive activity can nonetheless still be presented safely – in terms of available light, weather and the physical condition (tiredness) of the tour group members
- Communicating with stakeholders and/or third parties (communities, providers, carriers, destinations, caterers) – and advising the tour will be arriving earlier/later than expected/arranged
- Reviewing and revising the itinerary while on tour – by adjusting inclusions and activities in order to finish the tour on time
- Taking notes about the situation – so these may be used as the basis for feedback provided by the Tour Guide at the de-briefing session after the tour has finished.

1.3 Prepare on-tour requirements to support the interpretive activity

Introduction

The first *physical* action involved in making on-tour preparations for implementation of an interpretive activity in the field is the preparation of on-tour resources to support the activity.

This section highlights the need to set up the activity in accordance with plans for it, emphasises the need for respect for local customs and people, indicates the requirement to prepare tour group members for the activity, and mentions possible need to keep preparations secret from tour group members.

Need to set up according to plans

The Tour Guide must make sure setting up an interpretive activity is in accordance with the plans for it.

This is generally a non-negotiable requirement but Tour Guides are always expected to use their personal judgement, common sense and experience to make adjustments in order to optimise safety, maximise engagement with customers, ensure compliance with legislation and applicable Codes of Conduct/Practice and local agreements, and make sure budgets are not exceeded.

Plans prepared for the interpretive activity should be adhered to for the following reasons:

* Following the plans decreases the time required for set up – because functional directions and an effective list of preparatory activities in sequence/order will be provided

* They have been subjected to standard risk assessment protocols of risk identification, risk evaluation and risk control – and are therefore safe to conduct only 'as planned'

* They will comply with budget constraints imposed by the Tour Operator – regarding labour, physical resources of other expenditure items

* The plans may have been developed in collaboration/consultation with certain bodies/people who have insisted or required they be implemented 'as stated'

* Implementation according to the plan ensures compliance with all safety requirements – and Duty of Care obligations

* They will have been created to allow 'the right amount' of time for each activity – based on its individual type on the basis of trialling, experience and feedback received

* Implementation of an interpretive activity according to the plan will optimise the outcomes for the activity – and therefore increase satisfaction levels for tour group members, thereby increasing the potential for return and/or referral business.

Setting up an interpretive activity can involve the following generic actions:

- Obtaining resources – from:
  - Tour vehicles
  - Third party providers

- Inspecting the condition of equipment/items – to:
  - Make sure they are safe
  - Clean and/or repair items as necessary

- Obtaining handout materials, equipment and other physical resources – for:
  - Distribution to tour group members
  - Use within the activity

- Checking the activity area – to:
  - Confirm safety issues
  - Determine appropriate availability of location/s

- Holding a briefing – with:
  - Other Tour Guides and staff from the business
  - Others from outside the business who will be participating in the activity and/or delivering some aspect of the activity.

Respect for local communities

At all times the Tour Guide must ensure there is respect shown for local communities.

Practical aspects of this requirement may include:

- Meeting with local communities to develop Codes of Practice and other working agreements – in relation to tours and the conduct of interpretive activities

- Developing Codes of Conduct – for tour group members who visit local/host communities

- Notifying communities in advance – of dates and times of expected tours

- Maintaining regular contact with local communities – to obtain their feedback in relation to their experiences with tours so necessary adjustments to Codes and agreements can be made

- Providing economic opportunity for local/host communities – in terms of (for example) payment for work on tour-related jobs (guides, entertainers, demonstrators) the provision of retail opportunities (to sell goods and services to the tour group members) and/or the provision of food and beverages

- Advising the communities on the day (or the day before) the tour – so they receive a reminder of the tour and receive updated information about numbers, special requests and other relevant matters

- Notifying tour group members of acceptable and unacceptable conduct – see below ('Prepare tour group members') for further information

- Asking permission to enter lands/communities – every time a tour or activity is conducted on their land or in their community

- Observing the necessary cultural constraints – as required by different communities and cultures

- Maintaining secrecy of items and information – as requested by the local/host community

- Involving the local/host community in decision making which impacts them – so decisions/activities are never imposed on them against their will

- Parking only in designated areas – as prescribed by the communities

- Staying on designated walking tracks and agreed pedestrian routes – as opposed to walking 'anywhere and everywhere'

- Prohibiting taking of photographs – of certain areas or of people

- Banning use of limited/scarce local resources – such as water

- Identifying and banning carriage of nominated items/products onto community lands/property – this ban may be on fast food, newspapers, bottles, disposable nappies/diapers

- Cleaning up after using facilities – or a ban on using facilities

- Modifying tours and interpretive activities – on the basis of feedback received from the local communities.

Prepare tour group members

Another important aspect of preparing to deliver an interpretive activity is the need to prepare group members for the activity.

This can involve:

- Making a verbal presentation – explaining the activity and detailing what tour group members:
  - Can expect
  - Will be expected to so
  - Might think about when engaging with the activity

- Assessing individual capacity for individual tour group members to participate in the activity – in terms of (as appropriate) their:
  - Age
  - Height and weight
  - Physical fitness
  - Previous experience
  - Stated unwillingness/reluctance to participate

- Distributing materials, resources and/or equipment – which tour group members will/might:
  - Read to gain background knowledge about the activity
  - Use to engage in a practical way with the activity
  - Provide instructions, directions, tips, advice and suggestions to optimise engagement with and enjoyment from the activity

- Demonstrating use of items required in relation to the activity – this may involve showing how to:
  - Wear or use safety clothing and protective items
  - Use tools and/or sporting equipment
  - Achieve whatever may be the aim/objective for the activity
- Notifying tour members of basic operational parameters – in terms of (as applicable):
  - Start and finish times
  - Safety issues
  - Physical/geographical parameters relating to the activity
  - 'Do's' and 'Don'ts' for the activity
- Notifying tour group members of acceptable and unacceptable conduct – in terms of topics such as:
  - Language
  - Behaviour
  - Taking of photographs/videos
  - Engaging with community members
  - Cultural sensitivities particular to individual communities
- Introducing other people who will be helping to deliver the presentation – such as:
  - Third party guides or interpreters
  - Members of the local/host communities
- Encouraging tour group members to engage with the activity – by:
  - Motivating them through anecdotes and personal enthusiasm
  - Identifying the potential benefits and learning they may take from the activity
  - Offering ongoing help and support for them while they participate.

Keeping preparation secret

In some cases there can be a need for the Tour Guide to keep the preparation for activities secret from tour group members.

 This may need to be done to:

- Align with directions provided in the plans for an interpretive activity – as part of the SOPs for the activity
- Minimise noise which may adversely impact on enjoyment of tour group members – especially in relation to them sleeping or trying to concentrate on (for example) a DVD, the commentary, or another activity
- Keep them unaware of exactly what is planned for them – so the interpretive activity can be revealed as a surprise to excite them
- Protect confidentialities – regarding preparation activities and/or materials or sources used
- Avoid interruptions and distractions caused by unwanted attention and interference from participants – as they look at the procedures and engage in conversation with the Tour Guide.

1.4 Confirm operational details with colleagues

Introduction

An important aspect of preparing for an on-tour activity is the need to confirm operational details with colleagues.

This section provides background information to this requirement, and identifies topics which need to be covered as part of this activity.

Background

In relation to confirming operational details of interpretive activities with colleagues:

- All colleagues must be present to have details confirmed – this means internal staff (staff directly employed by the Tour Operator) as well as external staff (those employed from third party providers and/or from local/host communities)

- The confirmation needs to be scheduled – there should be a meeting or briefing scheduled for a certain time at a given location and this must be communicated sufficiently in advance to enable all required persons to attend

- The plans prepared for the activity must be the basis of the confirmation – and all staff should have a hard copy of their own for reference purposes

  - Many staff will write notes on their personal copy to highlight tasks they need to focus on and/or pay special attention to

- The meeting/briefing should take place in private – that is, it is traditionally not an event the tour group members have access to

- All persons with roles to play should already have had exposure to the interpretive activity before this stage take places – that is, everyone involved should have been provided with required training and trialling of the activity to gain first-hands, hands-on experience

- Discussion must be led by the Tour Guide or the person who has been delegated directed control of the individual interpretive activity – their primary role (subject to 'Content' below) is provide information, confirm arrangements and notify changes

- The session must feature two-way communication – where colleagues are encouraged to ask questions to clarify issues and confirm matters about which they may have some concern or reservation.

Content

While the nature of each briefing/information session prior to an interpretive activity will be unique (based as it will be on the delivery of a *particular* activity), there are nonetheless several common issues which will require coverage – these include:

- Roll call – this is done to:

  - Ensure all required staff are present as required

  - Cross-check staff present against planned/expected names and numbers

  - Confirm role allocation for the activity

  - Allow Tour Guide to meet and appraise all workers

- Provision of an overview of the activity – this involves:
  - Making sure everyone has a copy of the plan
  - A read-through of the goals and objectives for the activity
  - Description of relevant matters for the activity – which can include:
  - Themes and messages
  - Special requests
  - Presence of VIPs on the tour
  - Changes to be factored in – due to, for example, need to shorten or extend the activity
  - Focussing everyone's mind on the up-coming activity
- Confirmation the activity should proceed – according to risk management protocols – see next section
- Discussion of duration for the activity – which may relate to:
  - Confirmation of a scheduled starting time
  - Confirmation of a scheduled finishing
  - Verification with others that timing is appropriate
  - Notification of revision/s to scheduled starting and finishing times
- Development and/or confirmation of arrangements to address issues arising – these may be regarding matters to do with:
  - Modifications to the standard activity imposed as a result of changes to the location where the activity is to be conducted
  - Maintenance of safety and security where a legitimate need to change standard actions has emerged
  - Amendments deemed appropriate to alter the duration of the activity in order to maintain the overall itinerary/schedule for the tour
  - Required revisions to accommodate special requests
  - Changes brought about by the need to modify proceedings for certain budgetary reasons
  - Alterations deemed prudent based on feedback obtained from the tour group while on-tour – in order to better meet their expectations and optimise their level of satisfaction
- Allocation of staff to required positions – this will generally be a matter of:
  - Confirming the arrangements described in the plans and tested during the role playing/trialling for the activity
  - Adjusting staff allocation based on special needs of individual tour group members which have materialised on-tour and/or been advised at the commencement of the tour
  - Checking staff allocated to certain positions can comprehensively recite their role while in those positions
  - Confirming with relevant personnel there are sufficient staff in position at each location to enable required activities to be undertaken as expected

- Ensuring, where required by legislation or internal operational protocols, staff used at certain locations:
    - Hold necessary credentials/certification
    - Have required experience
- Verification of the presence of physical resources – including (as appropriate to the type of activity):
    - Handouts and paper-based materials for distribution
    - Food and beverages
    - Basis requisites – such as note pads, pens, sun hats, umbrellas
    - Technology and devices for self-tours
    - Playing/sports equipment
    - Emergency equipment – see next section
    - Safety clothing and equipment, where necessary – see next section
- Conduct of communication checks – to verify full operational status of equipment and devices to be used to:
    - Communicate between each other
    - Make contact with other/third party providers
    - Communicate with tour group members.

1.5 Provide for maximum engagement by customers

Introduction

A vital part of the preparation for an on-tour activity is the need to ensure all safety issues have been addressed.

This section examines the context for this important consideration and presents topics which must be addressed.

Context

In relation to safety issues associated with the conduct of interpretive activities:

- Safety must always be a standing topic for all staff briefing sessions prior to interpretive activities – safety must always be addressed
    - It can never be assumed or ignored
- Safety is paramount – Tour Guides must not do anything which compromises the safety of tour group members, members of the public or staff in any way
    - If there is a concern about safety, the activity must be:
        – Delayed until the issue can be effectively/safely resolved
        – Halted all together /not conducted at all
        – Replaced by another activity where safety can be guaranteed
- The risk assessment conducted as part of the planning stage for the activity must form the basis for safety check – this will commonly require specific mention of **mandatory** check points identified as part of the risk management process (for example: rain, heat, wind, ground condition, tour group numbers, crowds), together with:
    - A statement by the Tour Guide that each factor appears within acceptable parameters
    - A question asking colleagues to confirm or disagree with the above statement

    The point being the decision to proceed with safety with the activity must be a consensus decision and not one simply imposed by the Tour Guide – the decision to proceed must be verified/supported by other colleagues

- A designated Safety Officer is used for some interpretive activities – and they have **total control** over safety issues and decisions regarding safety
- There are traditionally three standard elements which need to be considered in relation to safety for interpretive activities – these are:
    - Participants – this means there can be a need to make sure tour group members are safe to engage with the activity and do not put themselves or others at risk

        For example:

        – People who do not meet certain pre-notified (weight or height, general fitness) criteria may be prohibited
        – Those who are too tired or intoxicated may be banned

- Environment – this highlights the condition of the environment may render an otherwise safe activity, unsafe

  For example:

  – High winds may mean conditions are unsafe

  – Heavy rain in adjacent districts can cause the potential for floods

  – Changes to the expected nature of the location/environment – this may mean (for example):

    o Safety equipment normally available is no longer available

    o A new risk not previously identified, assessed and controlled has emerged

  – Resources – this means there is a need to consider/ensure:

- The aim of all safety checks is to ensure 'safe place' is created instead of creating 'safe person' – this means:

  - Creating an environment where the safety of people is not dependent on them being safe/doing the safe or right thing

  - Ensuring that whatever participants do or fail to do, their safety is guaranteed by virtue of the safety protocols built into the place/location in which they are functioning.

Emergency equipment

Safety-related checks need to ensure:

- Emergency equipment identified as part of the risk management process for the activity is available as identified

- Emergency Management Plans are available

- Presence of nominated first-aid kits

- Availability of or access to necessary retrieval, rescue and recovery equipment

- Presence of communication equipment to raise alarm and/or summon additional assistance.

In some cases the presence of designated fire-fighting equipment/resources may be seen as a necessary element of emergency equipment.

Safety equipment

Safety equipment is often known as PPE (personal protective equipment and clothing).

The intention of PPE is to prevent harm/injury.

It is the responsibility of the Tour Guide/Tour Operator to:

- Provide appropriate PPE for the group

- Check all PPE to be used (whether belonging to the Tour Operator or to individual tour group members) prior to use

- Ensure all participants use/wear PPE as required.

PPE is required/provided 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.

Checks must ensure:

- Equipment is available in the sizes listed in the EMP

- Items are available in the numbers specified

- Gear is operating as required

- Items are safe to use.

Human resources

Checks must be made to ensure:

- Suitable staff to conduct safety briefings and demonstrations with participants – see next section

- Sufficient staff are present to enable effective supervision of activities

- Appropriate staff are present to undertake rescue, retrieval or recovery if necessary

- Qualified staff to deliver first-aid in the event an accident or incident occurs

- Capable employees to implement all listed requirements of all relevant EMPs for the activity to be conducted.

Security check

As part of the check to ensure *safety* it is common for a *security* check to follow to ensure the security of:

- Customer property and/or company assets during the activity to protect against accidental loss, theft or damage – this may require:

    - Placing valuables into a designated locked cabinet/safe

    - Locking items on the tour vehicle

    - Use of security staff

    - Removal of certain items from people while they are participating in the activity

    - Activation of security systems

- Local/host community – to protect them from:
  - Identified threats – as identified by the host people
  - Unintentional intrusion into their private lives
  - Illegal activities
  - Unacceptable language and behaviour
- The environment – in terms of:
  - Minimising impact
  - Avoiding foreseeable negative impact
  - Removing rubbish
  - Minimising use of scarce local resources.

1.6 Provide for maximum engagement by customers

Introduction

The final preparation task when preparing to deliver an interpretive activity is the ever-present necessity to optimise participant engagement.

This section highlights the need for this outcome and lists standard preparation protocols which will enhance attainment of this goal.

Need for this outcome

It is always critical to maximise engagement by tour group members with every interpretive activity because:

- This is why they have paid to be part of the tour – they will have chosen the tour (or the individual activity) because they have a definite interest in the interpretive activity which was advertised/promised

- Higher levels of engagement mean higher levels of customer satisfaction which, in turn, leads to:

  - Increased rates of referral business – where those who have enjoyed their tour/the activity will tell others (their family, friends and colleagues) thereby referring them to the same tour/activity

  - Greater likelihood of return/repeat business – where previous tour group members will:

    – Join another tour conducted by the Tour Operator because they were impressed with the first one

    – Come back and re-take a tour/activity they previously did simply because it was so enjoyable.

Ways to enhance engagement

At the preparation stage, providing for maximum engagement by participants may need to consider:

- Unloading items from the tour vehicle – together with:

  - Completing visual and other checks to confirm suitability

  - Counting and recording items

- Obtaining identified resources from third party providers – as previously arranged:

  - In accordance with purchase orders

  - To align with individual requirements – for example:

    – Specific activity requirements

    – Agreements regarding economic opportunity for local community

- Ensuring sufficient equipment – for all participants:
  - In-keeping with the plan for the activity
  - In accordance with their individual need and personal characteristics
  - To achieve objectives imposed by last-minute special requests
- Arranging for action to address missing/broken items – such as:
  - Buying additional items
  - Borrowing items
  - Adjusting the activity
- Positioning of items in the most appropriate position – which may require attention to:
  - Initial distribution of items at the participant briefing/demonstration
  - Placement of items at different locations/stations along the way
  - Maintaining security of items until they are used/required
- Planning for the positioning of customers – with reference to, as appropriate:
  - Initial briefing/demonstration
  - Practice session/s
  - Key stages within the activity.

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 For the purpose of this Work Project you are required to identify/select an 'interpretive activity' (to be approved by your Trainer and/or Assessor) which is to be conducted in the field and for this activity undertake necessary on-tour preparations for the activity providing evidence (as agreed with the Assessor) you have:

- Implemented relevant interpretive activity plans

- Scheduled the interpretive activity

- Prepared on-tour requirements to support the interpretive activity

- Confirmed operational details with colleagues

- Ensured safety issues have been addressed

- Provided for maximum engagement by customers.

Summary

Make on-tour preparations

When making on-tour preparations:

- Obtain and read the activity plans
- Clarify details about the group and the activity
- Realise the success of the activity hinges on effective planning and preparation
- Match planning and preparation to the identified needs of the group
- Focus on the message/s, the theme/s and the objectives
- Acknowledge the activity is part of a wider, total package
- Determine the time and location for the activity
- Identify those who will assist in conducting/delivering the activity
- Stay within budget
- Choose an appropriate presentation technique
- Organise all necessary resources
- Schedule the activity in accordance with all applicable agreements and arrangements
- Set up for the activity in accordance with plans for the activity
- Respect local communities
- Prepare all required resources to reflect identified requirements
- Liaise with others to confirm their roles and responsibilities
- Make safety a prime consideration for every activity
- Optimise customer engagement with the activity to increase enjoyment and satisfaction.

Element 2:
Introduce the interpretive activity

2.1 Alert people to the up-coming interpretive activity

Introduction

The first step in introducing an interpretive activity to tour group members is to alert them to

This section looks at the importance of this stage and presents a range of techniques which be easily employed to alert participants.

Importance of this stage

Making participants aware of all up-coming interpretive activities is essential in order to:

- Meet expectations – they expect to be made aware of what is happening

- Generate excitement and a sense of anticipation – which enhances enjoyment of the tour

- Get people talking – about the imminent event

- Keep people informed – to let them know how the tour is progressing in terms of the itinerary they have been given

- Allow individuals to prepare – on a personal basis, which may be:
  - Getting ready
  - Making a 'comfort stop'
  - Checking their camera
  - Having something to eat and drink
  - Changing clothes/footwear

- Give them an opportunity to:
  - Ask questions
  - Lodge special requests
  - Read handout material.

Techniques to use

Common ways to alert tour group members to up-coming activities are:

- Including them on the itinerary – and:
  - Making sure everyone receives a copy of the itinerary when they are issued with their ticket
  - Posting a copy of the itinerary in the camp or in the tour vehicle

- Identifying the activities as part of the pre-tour briefing – which may be conducted:
    - At a special event shortly before departure day (for extended tours)
    - On the day of departure before departing the Tour Operator's business
- Making verbal group-based announcements – which may be made:
    - Along the way/route of a walking tour
    - At rest or meals stops/breaks
    - On the tour vehicle
    - At end-of-day sessions (for multiple day tours)
    - At briefing sessions at the start of each day (for multiple day tours)
- Advising of the details of the of the activity – which will involve:
    - Describing the physical/geographic location of the activity
    - Identifying about timing – start and finish times
    - Notifying of any necessary changes which have to be made – together with explanation of cause/reason
- Encouraging engagement – which can include;
    - Motivating people to attend or watch
    - Highlighting the benefits of participation
    - Setting challenges
    - Stressing the unique nature of the activity/experience
- Responding as appropriate – to:
    - Questions
    - Concerns
    - Fears
    - Issues arising
- Speaking to people on an individual basis – to:
    - Ensure all group members are aware of up-coming activities
    - Show interest in individuals
    - Optimise likelihood of responding positively to all concerns/matters raised.

2.2 Welcome customers to the interpretive activity

Introduction

At the designated site for the interpretive activity the tour group members should be welcomed.

This section details the range of topics which need to be covered as part of the content of the welcome to an interpretive activity.

'The Welcome'

When welcoming tour group members to an interpretive activity the activities below are standard practices:

- There is a welcome for *every* interpretive activity – where there are multiple activities each activity must be given its own welcome because:
  - They are different/unique – no two activities (at least on the same tour) should be identical although they may be similar
  - They are individually an important part of the total package bought by the customer and deserve their own introduction
  - There is a need to provide activity-specific detail and information in order to enhance and illustrate the activity
- There must be an actual spoken welcome – which must:
  - Identify the location/the physical location of the activity
  - Identify the activity – by name and/or type and/or title
  - Demonstrate enthusiasm for what is about to be presented
  - Provide relevant background information to the activity
  - Give a suitable context for the activity
  - Link this activity to any previous activities which have similarity/relevance
- The welcome should be relatively short – it needs to happen but:
  - It must not dominate
  - It should not unnecessarily delay
- Provision of relevant materials appropriate to the site and/or activity – such as:
  - Notes and handouts
  - Information sheets and brochures
  - Maps
  - Samples
  - Snacks
  - Name tags

- Presentation of site-specific Code of Conduct – with which all tour group members are expected to comply highlighting, describing and illustrating:
  - Acceptable and unacceptable behaviour
  - Acceptable and unacceptable language
  - Rationale for same
  - Consequences of failing to comply
- Introducing other staff who will assist the Tour Guide – in terms of:
  - Providing advice to tour group members
  - Demonstrating requirements to participants
  - Supervising and controlling the overall activity or particular aspects of it
  - Specialist roles and responsibilities.

Recorded welcomes

Some tours and activities feature the use of recorded 'welcomes'.

These:

- Are standard video and/or audio welcomes shown at the start of nominated activities – to all tours/tour group members
- May incorporate other aspects of the activity also – such as:
  - Explanations of activities
  - Demonstrations of practice
  - Identified risk associated with the activity
  - Safety issues
- Will require tour group members to be assembled in some form – so they can gain optimum information from them, either:
  - On the tour vehicle
  - In a room
- Should be supplemented by a face-to-face 'live' session – which:
  - Allows additional information to be provided
  - Enables questions to be answered.

2.3 Explain the interpretive activity

Introduction

After tour group members have been formally welcomed to the interpretive activity, the activity must be explained to them.

This section identifies aspects which may need to be addressed as part of the process of explaining an interpretive activity.

Practicalities

Practicalities in relation to explaining an interpretive activity are:

- In many cases the presentation of this section is undertaken at the same time as 'demonstrations' for the activity – as described in the next section

- In some cases the 'Welcome' (see previous section) also includes an explanation of the activity – as well as demonstration of necessary pre-requisites

- Care must be taken to ensure correct positioning of tour group members and presentation staff – so:
  - Everyone can hear what is said
  - All can see what is done

- Amplification of explanations may be acceptable (or necessary) – where this:
  - Does not negatively impact local amenity
  - Does not intrude on the enjoyment of others

- Presentation must reflect the plans for the activity – in terms of:
  - What is said
  - Sequence of information
  - Individual roles and responsibilities of staff conducting the explanation
  - Training undertaken for this part of the activity

- The explanation must be in accordance with previous information provided about the activity – as presented, for example:
  - In advertisements and promotions for the tour/activity
  - In contracts for the tour
  - On itineraries
  - At previous briefings/advisory sessions
  - During earlier discussions

- Linkages should be made to previous activities – with reference to:
  - Experiences
  - Lessons learned
  - New thoughts/perspectives gained

- Explanations must always include training for the activity – with reference to:
  - Demonstrations – see next section
  - Practice
  - Tips and advice for optimising mastery/competency
  - Rules of the game
  - Objectives of the activity
- Need to pay attention to the time spent on explanations – which means:
  - There needs to be 'sufficient' explanation
  - The explanation must never dominate or steal time from the actual activity
  - Explanations must never be padded out
- There can be a need for repetition of explanations – with attention paid to perhaps:
  - Repeating what has been said
  - Paraphrasing – saying the same thing but using different words
- Checking for understanding – through a combination of activities as described in section 2.5
- Willingness to use other tour group members to help with explanations – where:
  - This is appropriate
  - More experienced persons appear ready to assist less experienced ones
- Highlighting risks associated with the activity – in terms of:
  - Type and timing
  - Location
  - Management and control
  - Potential impact
- Action to take in the event of certain eventualities – such as:
  - Difficulty
  - Danger
  - Incident and accident
  - Changed circumstances/weather
  - Becoming lost/separated from group.

2.4 Demonstrate necessary pre-requisites for the activity

Introduction

Following the explanation (or as part of it) the interpretive activity may require certain pre-requisites to be demonstrated to tour group participants.

This section details topics for coverage when demonstrating necessary pre-requisites of activities to tour group participants.

Necessary pre-requisites

Demonstrating necessary pre-requisites will/may involve:

- Implementing approved plans for demonstration of the interpretive activity – according to:
  - The individual activity
  - Site factors/constraints
  - Training, role plays and drills in this regard
- Distributing equipment – such as:
  - Handing out items
  - Naming the items
  - Describing their use
- Integrating explanations with demonstrations – so:
  - Understanding is optimised
  - There is a seamless delivery of information
  - Safety is a constant thread
- Using the tour team to conduct a simulated/model activity – to:
  - Show how to undertake the activity
  - Demonstrate tips and techniques
  - Highlight certain aspects of the activity (as appropriate to the individual nature of the activity) such as:
  - Teamwork
  - Speed
  - Skill levels
  - Observation of the environment/happenings
  - Interpretation of data, evidence or material
  - Application of the rules
  - Alignment with outcomes

- Focussing on the standard presentation technique for demonstrations – which includes:
    - Demonstrating at normal speed what needs to be done with no explanation whatsoever
    - Then demonstrating slowly/step-by-step with explanations at each stage – perhaps asking participants what the next step is and/or why the next stage needs to occur
    - Asking tour group members to join in – and practice/demonstrate the activity along with/at the same time as the Tour Guide
    - Providing time for individual practice – with supervision and, where necessary, assistance in order to generate some level of competency
    - Building on known previous knowledge

- Walking the activity ground (for certain activities only) – which means:
    - Physically walking around the activity ground/site
    - Pointing to dangers and risks – and highlighting the actions/controls which are inherent to prevent accident or injury
    - Providing specific techniques which may be useful at different points of the activity
    - Highlighting location of safety equipment, rescue gear and/or emergency equipment
    - Indicating where Safety Officers/Marshals will be positioned – and how tour group members can/should gain their attention/contact them

- Distributing activity-related items if required – together with:
    - Providing Instructions and/or directions
    - Explaining rules for games or activities
    - Linking use of items to objectives/intended outcomes

- Distributing safety equipment, if required – including:
    - Naming items – and important parts of same
    - Explaining and demonstrating use of same
    - Indicating why and when items are required
    - Highlighting location of items during the activity

- Showing how to use equipment – which should cover:
    - Demonstrating how to use games equipment
    - Illustrating use of activity-specific items
    - Linking safety to use of equipment and items

- Showing use of PPE – in terms of:
    - Demonstrating how to wear necessary safety clothing
    - Helping tour group participants put on/correctly wear protective clothing
    - Demonstrating how to use personal safety items
    - Helping individuals achieve basic competence in use of personal safety items

- Showing how to use emergency equipment – with attention paid to:
  - Indication of triggers for implementing use of same
  - Explanation/illustration of role of customers and role/s of tour staff in the event of an emergency
  - Identification of available items
  - Specification of location of emergency equipment
- Employing the services of 'sufficient' personnel – to:
  - Speed up the process
  - Facilitate the process of demonstration
  - Give enough options for all customers to look at and learn from
- Allocating sufficient time for the demonstration/s – such that:

2.5 Confirm customer understanding regarding the up-coming activity

Introduction

A vital part of the explanation and demonstration phase is the need to ensure tour group members understanding of requirements.

This section explains the importance of this stage and presents strategies for confirming understanding.

The importance of this stage

There are several important reasons to ensure tour group members understand explanations and demonstrations relating to an up-coming interpretive activity:

- It helps demonstrate discharge of the common law Duty of Care – and thus helps protect staff and the business against legal action

- It helps optimise safety for everyone – which must always be the primary consideration *regardless of all other factors*

- It generates increased involvement/engagement with the activity – and so optimises the twin potentials for increased levels of customer satisfaction and sense of achievement

- It allows an opportunity for people to ask questions – and further clarify issues or ambiguities

- It provides (another) chance for users to gain familiarity with what is required – and increase their personal level of mastery/competence

- It increases the likelihood participants/tour group members will learn from the experience – or achieve one or more of the identified objectives for the activity

- It underlines the potential for accident and injury – and thereby focusses the mind and attention on the activity.

Keys to remember are:

- it is **never** sufficient to present information and/or demonstrations – and simply assume (or *hope*) tour group participants will automatically understand what is required

- Use additional staff to assist in the process where there are significant numbers in the tour group – as this will speed up this part of the activity

- The confirmations/checks prescribed in the plans for the activity must be the primary strategies used – supplemented by other options

- In some (limited) situations there can be a need to engage in specific confirmation activities – which might include requiring participants who wish to engage in the activity to sign a 'Voluntary Assumption of Risk' document – which:

    - Acknowledges the risk/s they are taking have been explained to them

    - Seeks to protect the Tour Operator against legal action in the event the customer is injured, dies or suffers some form of loss as a result of participating in the activity.

Strategies for confirming understanding

It is best to use a *combination* of techniques (rather than one, single approach) to confirm tour group member understanding of an activity.

Options include:

- Asking questions – to check knowledge and/or understanding

- Administering a basic 'test' – which may be:

  - A verbal informal assessment

  - A written test – usually brief in nature such as 'True' or 'False', or 'Select the correct response'

  - A practical test – which can cover:

  - Use of safety/emergency equipment

  - Implementation of basic/standard procedures

- Checking of individual customers – in terms of:

  - Physically checking the items of equipment each person is going to use

  - Physically checking the fit and wearing of safety clothing

  - Asking people to move/function within their safety clothing

  - Posing individual tests/trials for people

  - Eligibility criteria

- Encouraging customers to ask questions – by:

  - Asking for questions

  - Responding politely and positively to them

  - Thanking those who ask them

- Providing additional guidance and explanation – as deemed necessary based on:

  - The nature of the question asked

  - The degree of confusion/misunderstanding which appears to be present

  - The threat/danger posed by the person not knowing the relevant information – this highlights not all information is 'critical': some is simply 'nice to know'

- Monitoring people actively to judge levels of understanding – by:

  - Reading their body language

  - Interpreting their facial expressions

  - Listening to what they say and how they say it.

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.

Note: this Work Project follows on from the previous Work Project and forms the basis for the following Work Projects for this unit.

2.1 For the interpretive activity identified as the basis for Work Project 1.1 you are required to introduce the interpretive activity providing proof you have:

- Alerted people to the up-coming interpretive activity
- Welcomed customers to the interpretive activity
- Explained the interpretive activity
- Demonstrated necessary pre-requisites for the activity
- Confirmed customer understanding regarding the up-coming activity.

Summary

Introduce the interpretive activity

When introducing the interpretive activity:

- Advise tour group members of upcoming activities
- Distribute information and materials about the activity
- Create excitement and expectation
- Encourage questions about the activity
- Prepare a formal welcome to the activity
- Explain relevant details, context and objectives
- Demonstrate requirements
- Provide an opportunity for tour group members to practice, where necessary
- Check physical capability of participants
- Emphasise safety
- Distribute and demonstrate use of PPE
- Address emergency protocols
- Verify participants understand what is required.

Element 3:
Conduct the interpretive activity

3.1 Assemble tour group as required

Introduction

Assembling the tour group precedes the conduct of all interpretive activities.

This section provides common considerations in relation to this very basic action.

Assembling the group

Standard on-tour protocols regarding assembly of the tour group are:

- Check personal requisites before convening the group – this means:

  - Double-checking own items and equipment before starting the assembly
  - Verifying items and equipment of staff who are to participate before starting the assembly
  - It is very unprofessional to assembly the group and then have to delay events while employees get ready
  - This also does not engender faith/confidence in tour personnel

- Group assembly must flow from (if not actually *be part of*) the explanation and demonstration phase – it is incorrect to believe:

  - These are separate and distinct 'stages' to the introduction and commencement process – rather they should be seen as blending into one seamless 'pre-activity undertaking'
  - There are required timelines for any of the actions mentioned – some will be quite brief while others can be expected to take considerably longer. Strive to maintain the itinerary for the tour/activity

- All the group should be assembled – where possible/appropriate or time-effective

  - Time can often **not** be spent ensuring absolutely everyone is present
  - There must always be a requirement for 'the greatest good for the greatest number' which may mean repeating introductory remarks to those who missed them

- The assembly of the group should occur with some planning – which may be:

  - After all necessary explanations and demonstrations have been completed
  - Once all handouts/distributions have taken place
  - Following confirmation (as appropriate) that all tour group members understand what is required
  - At the same location and at the same time as explanations and demonstration are performed

- Conduct the assembly at a logical point – this is/may be:
    - Dictated by common sense and experience
    - Stated in the plans for the activity
    - Governed by the size of the group
    - Determined by the weather and/or existing conditions
    - Influenced by safety concerns
    - Impacted by agreements/arrangements with the host/local community or the venue/operator where the activity is being conducted

- Follow the standard lecture/training dictum when assembling the group – which is:
    - Tell them what they are going to be told – the Introduction
    - Tell them – The Body
    - Tell them what they have been told – repeat/recap things

- Be assertive when directing the group to assemble – which means:
    - Not being *aggressive*
    - Giving clear directions
    - Organising individuals/groups
    - Speaking loudly enough to be heard

- Maintain and/or create atmosphere and anticipation – through:
    - Choice of words and phrases used
    - Personal orientation and/or enthusiasm
    - Encouraging (as appropriate):
    - Competition between people
    - Commitment
    - Willingness to try/participate

- Notify relevant others at this stage – there can be a need at this point to:
    - Update Head Office of progress
    - Inform the local/host community
    - Tell third party providers about timing.

3.2 Provide commentary and interpretive presentation techniques

Introduction

Conduct of interpretive activities will traditionally require the provision of commentary and the use of a range of interpretive presentation techniques.

This section offers advice for delivering commentaries and identifies and briefly discusses a range of traditional interpretive presentation techniques.

Basic information about commentary and presentation

Providing commentary and implementing interpretive presentation techniques is very much an 'individual activity' consideration.

That is, it/they will:

- Depend on the nature and context of each interpretive activity – an approach totally satisfactory for one activity will be totally inappropriate for another

- Vary with the unique character and style of the individual Tour Guide – the approach that suits one Tour Guide will not suit another

- Have to change based on the known needs, wants and preferences of the tour group members – and, commonly, their demographic profile

- Need to reflect advertisements about the tour and/or activity – in order to meet customer expectations and avoid disappointment

- Be necessarily relevant to the activity – and the theme, messages, objectives and context for the activity

- Must be applied sensitively for each activity – this means their application must be for the benefit of the tour group members and not (just) for the benefit/pleasure of the Tour Guide or other tour staff.

Presenting commentaries

All tours will require some form of commentary.

Not all interpretive activities will.

Commentary may be described as:

- Scripted
- Unscripted.

A scripted commentary is a prepared talk about identified topics of interest to a group of tour group members.

The scripted commentary may be prepared by the Tour Operator and provided for use by the Tour Guide, or there may be a need for every Tour Guide to develop their own scripted commentary for each group they lead and for every interpretive activity they conduct.

A scripted commentary should be thought of as a **_guide_** about what needs to be said rather than a _complete list_ of everything that needs to be said during an activity.

There will always be a need to provide some _unscripted_ commentary to supplement whatever scripted commentary is prepared.

Unscripted commentary refers to the situation where information is provided to the tour group throughout the activity but reference is not made to a script when doing so.

In many cases, experienced Tour Guides will memorise the scripted commentary for regular/scheduled tours and interpretive activities.

Advice on delivering scripted commentary

Basic communication strategies which can/should be used to deliver commentaries may include:

- Ensuring visibility to all tour group members – it is preferable if all people participating in the activity can also read/see the lips of the Tour Guide when they are speaking but at a minimum they should at least be able to _see_ the person speaking to some extent

- Facing the group – to the greatest extent possible

- Speaking loudly enough for everyone to hear – or using technology/amplification to help project the voice

- Remaining enthusiastic and appropriate to the nature and content of the activity – and appropriate to the nature/profile of the tour group members: some groups/topics require a sombre approach and others a lively and engaging demeanour

- Beginning the verbal commentary sufficiently in advance of a scheduled event – so participants have time to focus on whatever is the focus of the commentary

- Alternatively a decision may be taken to arrive at a stop/location, and _then_ deliver all the commentary at this point – timing constraints will often dictate which option needs to be used, as will the mood/response of the tour group

- Focussing attention on entire group – the commentary must be directed at, and embrace, all the tour group member.

  Never fall for the common traps of:

  - Talking only to those who are closest

  - Directing commentary at those in the immediate line-of-sight

  - Commentating only to one or two 'special' group members

  - Focussing on a certain person, age group, nationality or gender

- Communicating at level that will be understood by the audience considering their age, education, language, culture and special needs – this frequently means:
  - Keeping things simple
  - Using hand gestures to accompany verbal communication
  - Using appropriate words, terms and phrases
  - Highlighting points identified as being of interest to the group
- Seeking feedback from the group throughout the commentary:
  - Can they hear/see?
  - Anything else they want to know?
  - Do they want a break/rest?
- Encouraging questions – and responding to them in a way which demonstrates questions really are encouraged and appreciated
- Making the commentary a 'unique' event – avoid allowing commentaries to:
  - Become boring and lifeless
  - Sounding rote and mechanised/robotic
  - Adding comments which include new information and target the interests of the group
- Knowing when to be quiet – many people who deliver commentaries seem to think their job is to talk 'all the time' and this is definitely not the case/requirement

  It is important to keep quiet to allow participants to:
  - Have a break from being talked at/to
  - Experience the activity/tour in relative peace and quiet
  - Enjoy the experience on their own
  - Think
- Adjusting the commentary as required – to accommodate:
  - Identified interest of the group
  - Emerging events.

Using interpretive presentation techniques

Role playing

Role playing involves prescribed situations where tour group members or tour staff act out nominated roles and scenarios – in order to:

- Give or gain a sense of engagement and reality to various topics
- Experience a set of circumstances
- Practice responses to a hypothetical situation.

Commonly a de-briefing sessions with discussion/s and informed input from the Tour Guide follows these activities.

The role plays may be filmed for inclusion in a video/DVD provided to customers at the end of the tour.

Voice techniques

Different voice techniques will add interest to the tour and to a commentary.

They include:

- Speaking faster or slower

- Pausing/stopping and allowing silence/a pause in the commentary

- Speaking louder/shouting or speaking more quietly/whispering.

Voice techniques can also include:

- Putting a Tour Guide 'in character' when discussing a certain person/individual

- Using local names, terms and pronunciations

- Using local dialects and accents.

Story-telling

Story-telling can be used to:

- Illustrate a point or make a point

- Contribute personal anecdotes

- Pass on a myth or legend

- Add interest and diversity.

Games and activities

Games (which can include playing sport/s) feature tour group member participation and as a result of their engagement they:

- Have fun

- Learn something

- Experience something new.

Demonstrations

These are popular interpretive activities.

They may:

- Be straight-forward demonstrations – where a skill is demonstrated to the group, and the group do not participate apart from observing

- Feature group action – where the tour group practices the skills being demonstrated

- Include descriptions/commentary as part of the demonstration

- Precede an activity where tour group members have to perform a skill.

Participant interaction

Participant interaction features activities where members of the tour group:

- Interact with each other

- Interact with members of a community

- Interact with the environment, situation or location.

A de-briefing and discussion session usually follows the activities so participants can compare experiences and share experiences.

This activity may also be filmed/taped or photographed for inclusion in an end-of-tour DVD/video or set of photos.

Sensory awareness exercises

These are exercises where people are able to (for example):

- Smell 'the roses' or the coffee, or other items relevant to the theme of the tour

- Taste food and beverages

- Feel textures, temperatures and weights.

Discussions, analysis and personal comparisons and thoughts may accompany the experience or participants may be encouraged to experience the exercise in solitude and reflect on their own orientations.

Use of materials

The use of materials is a commonly applied interpretive activity to enhance illustration and experiences.

Materials may feature the use of:

- Local product/s

- Visual aids

- Support materials

- Props/prop kits.

Use of technologies

Use of technology to assist with delivery is increasingly common in all tour types and with nearly all tour activities.

It may require/include:

- Audio-visual equipment

- Sound and lighting technologies

- Systems and equipment designed to optimise safety and/or comfort.

Websites

It may be useful at this point to view the articles below:

http://www.nps.gov/idp/interp/103/103mod.pdf - Preparing and presenting and interpretive talk (National Parks Service: US Department of the Interior)

http://www.nps.gov/idp/interp/210/210mod.pdf - Prepare and present an effective conducted activity (National Parks Service: US Department of the Interior)

http://www.nps.gov/idp/interp/220/220mod.pdf - Prepare and present an interpretive demonstration or other illustrated program (National Parks Service: US Department of the Interior).

3.3 Apply appropriate interpersonal skills

Introduction

It is vital to use a range of communication and interpersonal skills when conducting an interpretive activity.

This section details suggestions for optimising the activity experience for tour group members, building and maintaining a good rapport with customers, and considers conflict resolution and negotiation.

Optimising the activity experience

Ways to optimise the interpretive activity experience for individuals can be:

- Using humour when talking with people – most tours or activities contain an element of fun and the use of appropriate humour at appropriate times can set the scene for fun and actually impart fun and enjoyment as part of the experience

- Checking on people's welfare – by:
  - Asking if they need anything
  - Verifying they are OK and prepared
  - Helping them

- Applying suitable interpersonal and communication skills at every opportunity/exchange – such as:
  - Smiling and using eye contact
  - Demonstrating interest
  - Responding to questions
  - Clarifying information

- Involving members of the group in what is happening – this can include:
  - Telling them what is about to happen
  - Providing them with advice of some sort to enable them to move forward with their learning, experience or whatever is the focus of the activity.

Building and maintaining a good rapport

Good rapport-building costs nothing but does require some effort.

It is necessary to enhance visitor experience of their tour/activity.

Techniques to build rapport with participants may include:

- Extending/building on conversations when people were initially greeted– such as:
  - Remembering and using the person's name
  - Mentioning something talked about as part of the previous contact
  - Checking to ensure something they queries earlier has been resolved to their satisfaction

- Asking participants questions – about topics such as:
  - Their country of origin
  - Personal interests and specific interests for this tour
  - Their reasons for being on tour
  - Their previous experiences and tours
- Using icebreakers – these are quick exercises which can be used to 'break the ice' and introduce tour group members to each other at the start of a tour or activity

  They are really only suitable where:
  - The participants do not already know each other – if the group members already know each other then ice-breakers are often not appreciated and many resent having to participate in them
  - There is sufficient time to conduct them – they can be quite time consuming
  - A suitable, comfortable location exists to do them – standing in the heat is not a good location.
    See http://insight.typepad.co.uk/40_icebreakers_for_small_groups.pdf and http://training-games.com/pdf/40FreeIceBreakers.pdf for examples.
- Using anecdotes when interacting with participants – these are short stories relevant to the tour and/or the activity and are used as they add interest and provide insight into the experience
- Sharing with individuals – in terms of:
  - Their findings within the activity
  - Their thoughts and feelings
  - Conclusions they have come to
  - Revised thinking
  - Experiences
- Applying suitable non-verbal communication techniques – such as:
  - Using similar body language and signals to those being used by individuals in the group
  - Focussing on being open, approachable, friendly, relaxed and inclusive
  - Realising the need for non-verbal language to align with/support verbal language to avoid confusion about the message being sent
  - Using appropriate voice tone and pacing
- Avoiding judgements – about:
  - People and their experiences
  - Choices made by individuals
  - Thoughts and conclusions that tour group members come to as a result of the interpretive activity

- Embracing diversity – in terms of:
  - Seeing beyond the 'obvious' indicators of tour group members – such as their age, gender, dress, race and/or disability
  - Avoiding pre-judging and stereo-typing people
- Giving (warranted) compliments – in relation to:
  - Comments made by tour group members
  - Actions taken by individuals
  - Thoughts and ideas held or contributed to the group.

Websites

Information on rapport building can be found at:

http://www.skillsyouneed.com/ips/rapport.html - Building rapport

http://www.wikihow.com/Build-Rapport - How to build rapport

http://www.mindtools.com/pages/article/building-rapport.htm - Building rapport.

Negotiation

There can be a need to negotiate a decision regarding some aspect of an activity with the tour group where, for example:

- There are several options available to choose from
- Things are not going according to plan and remedial action needs to be taken
- Members of the group want to do something other than what is planned
- Unexpected circumstances arise.

In this context keys to negotiation include:

- Strive for a win-win outcome – a negotiation is not about coercing or forcing the tour group/people into a pre-determined decision
- Be prepared to give – not just take
- Plan in advance – to develop a strategy and suitable tactics
- Know what is **not** negotiable – and ensure key elements of the activity are always delivered and safety is never compromised
- Be inclusive – involve everyone, exclude no-one
- Communicate well – think before speaking and speak clearly
- Explain the situation requiring negotiation – never assume everyone knows what needs to be resolved
- Give reasons for (possible) action – rather than ultimatums
- Be prepared to suggest a solution – for others to consider if they are unable to identify their own solution
- Encourage people – to participate in the process
- Thank people – for making contributions
- Confirm the agreed outcome – to verify the detail and make sure regarding the decisions that has been made
- Implement the negotiated decision as agreed – promptly and without variation from the agreement.

Websites

More on 'negotiation' can be sourced from:

http://www.wikihow.com/Negotiate - How to negotiate

http://www.brodow.com/Articles/NegotiatingTips.html - Ten tips for negotiating.

Conflict resolution

One important event which needs attention on tours and within activities is the need to handle conflict with and between tour group members.

Tips include:

- Realise no problem will ever resolve itself – problems require action to fix/address them
- Take responsibility for taking action – it is part of the job of the Tour Guide and the tour staff to do so
- All identified issues must be addressed – it is an option to ignore a problem
    - If appropriate/possible, look for 'safety angle' on which to focus the conversation to be had with those creating/causing a problem or issue
    - People are more likely to listen and comply if it can be demonstrated they need to alter what they are doing because it is unsafe or poses a risk to others
- Treat people with respect – talk politely with them allow them their dignity
    - Aim to make the other person feel special, not to feel victimised
- Talk with people who need to be spoken to away from others in order to respect their right not to be embarrassed or challenged in front of others
- Try to stay calm – when a need to intervene and say something to a participant arises
    - Aim to 'act' but do not 'over-react'
- Avoid using a loud voice – try to speak so the conversation is private, and so those being spoken to do not feel as if they are being reprimanded in front of the rest of the group and being made to look silly or 'small'
- Phrase what is said so it is not a personal 'attack' on the other person – for example, instead of saying "You must not do that", re-phrase the statement to "We prefer such action does not take place while here/on tour/in this location"
    - Try phrasing statements asking people to modify their behaviour as 'requests' rather than 'commands'
- Give reasons why the request is being made
    - There is big difference between 'Stop doing that' and "Could I please ask you not to do that because it scares the animals?"
- Look through the eyes of the tour group member and try to see things from their perspective
    - For example, consider saying "I can see you are tired and I know we have walked quite a long way and it is hot, but I need you to know it is not acceptable for the safety of others for you to wander off on your own to have a rest".

Websites

There is more on conflict resolution at:

http://www.crnhq.org/pages.php?pID=10 – Conflict resolution skills

http://www.mindtools.com/pages/article/newLDR_81.htm - Resolving conflict rationally and effectively.

3.4 Use prepared aids and materials and equipment to support presentation

Introduction

A standard element of many interpretive activities is the need to use prepared aids and materials as well as suitable equipment to support presentation.

This section identifies examples of aids and materials which may be used and presents examples of equipment and technology which may also be required.

Aids and materials

Keys

The following are important considerations regarding aids and materials to be used in an interpretive activity:

- All aids and materials to be used for an interpretive activity need to have been prepared and packed as part of the planning and preparation process for a tour – it is 'too late' to do this on-tour/at the activity site because there is just too much else to do

- Aids and materials must be appropriate to the individual nature of the activity – and:

  - Allow the identified objectives to be attained

  - Reflect required/requested information

  - Revised regularly to ensure they match changed conditions

- Items must be sufficient in number – so every tour group member receives 'their own' copy of hard copy materials

- Items must be 'user-friendly' – this can mean they (may) need to be:

  - Written/presented in a language which can be understood

  - Clear and unambiguous

  - Easy to carry/handle.

Examples

Aids and materials can cover an extremely wide range of physical and human resources.

The following is representative of what is commonly used:

- Hard copy items which will vary depending on the type of activity – such as:

  - Safety tips

  - Information handouts

  - Rules of the game

  - Permanent ('take home') copy of the scripted commentary provided by the Tour Guide

  - Maps

  - Diagrams

  - Photographs

- ▪ Sight cards
- ▪ Activity sheets
- ▪ Exercise sheets
- ▪ Question sheets
- ▪ Score cards
- Activity-related physical resources (not including safety/PPE) – which may include:
  - ▪ Sports gear
  - ▪ Props
  - ▪ Costumes
  - ▪ Equipment and items specific to the individual nature and need of particular activities – for example:
    - – Pens
    - – Note books
    - – Binoculars
    - – Nets
    - – Special needs gear – to optimise engagement of participants with medical issues, disabilities or other individual needs
    - – Natural resources – as appropriate
- Human resources – in the form of:
  - ▪ Sufficient observers – to monitor activities and intervene when safety is threatened
  - ▪ Performers and actors
  - ▪ Players, teams and troupes
  - ▪ Presenters and demonstrators
  - ▪ Guest speakers
  - ▪ Aides/assistants
  - ▪ Involvement of local/special interest organisations and groups.

Equipment and technology

Equipment and technology may be required to present and/or conduct an activity.

These items may:

- Be available at the activity site by prior arrangement/supplied as a matter of course by the destination
- Need to be taken to the activity site/venue by the Tour Guide.

Equipment and technology often includes:

- PA systems and microphones
- Megaphones
- Overhead projectors
- Data projectors
- Slides and transparencies
- Sound and lighting technologies
- Laser pointers
- Personal electronic devices.

Websites

It is worth noting the technology available at the following sites;

http://www.phonak-communications.com/en/products/tour-guiding/ - Phonak tour guiding

http://www.acoustiguide.com/group-guiding - Acoustiguide group guiding.

3.5 Encourage audience participation, where appropriate

Introduction

There can be a need for the Tour Guide to encourage tour group/audience participation with an activity.

This section highlights the need to be sensitive in this regard, presents a range of techniques which have proved effective in this regard and looks at the possible need to generate confidence among participants as part of this process.

Need for sensitivity

Where appropriate the Tour Guide should encourage individuals in the tour group/audience to participate in the activity but this must be done with sensitivity.

It is important to be sensitive in this regard because:

- Some people simply do not want to participate in every activity – they may be:
  - Happy to observe and watch what others do
  - Seeking to simply experience the moment on their own
  - Shy and/or self-conscious
  - Confined by traditional thinking
- Some people are unable to participate in every activity – due to:
  - Tiredness
  - Lack of physical capacity/ability
  - Health/medical reasons
  - Need to care for/look after other.

Encouraging participation

Encouraging active engagement of tour group members with activities can be achieved by:

- Being personally enthusiastic about the activity – with reference to:
  - Personal energy levels
  - Actions
  - Body language
- Verbally motivating people – through actions such as:
  - Providing clear and detailed information and instructions
  - Giving tips about how to optimise the performance of the tour group members
  - Providing additional demonstration of what is required
  - Highlighting the benefits of the activity and the gains which can flow from engagement
  - Speaking from personal experience about feelings regarding involvement
  - Drawing comparisons with other activities and/or situations

- Circulating throughout the group – and:
    - Demonstrating personal passion for the activity
    - Adding extra information or advice according to specific context
    - Offering comment based on identified need
    - Asking people about their progress and experience
    - Setting achievable/realistic targets/challenges for individuals or groups
    - Being understanding when people do **not** want to engage/participate
    - Sharing frustrations and disappointments

- Tailoring provision of additional/ongoing information to the identified needs of the group – while the *scripted* commentary will/should have done this, it is also essential to do this with 'issues arising' throughout the activity such as:
    - In response to questions
    - When unexpected events and sights arise

- Using a prop kit – to add action, excitement, interest and flavour
    - Always consider including props which can be given to, and used by, tour group participants as a way of involving and including them – see previous notes

- Using variety of approaches – this means 'mixing it up when communicating through the use of:
    - Humour
    - Statistics
    - Questions
    - Personal anecdotes and experiences

- Highlighting unexpected occurrences – and including them in interactions with the group or individuals

- Interacting with **all** tour group members on an **ongoing** basis – through personal exchanges and shared experiences and feelings
    - Many complaints about a Tour Guide relate to their failure to mix with people, talk to/with them, and/or to demonstrate engagement with them

- Improvising commentary – by incorporating topics of current interest to the group as identified through interaction with them during the activity and/or tour

- Striving to deliver excellent service at all times regardless of the problems or situations which present themselves – this involves:
    - Turning negative circumstances into positive demonstrations of good service, wherever possible
    - *Asking* people to do things, rather than *telling* them
    - Smiling
    - Treating tour group members as individuals and not as a 'herd'

- Responding to requests where possible – and explaining why not when requests cannot be met

- Being polite and courteous

- Keeping promises made about the tour and the activity

- Providing relevant, accurate, timely and informative commentary and comments

- Keeping tour group members informed about the need to change planned/schedules activities – explaining the reasons why and (where possible) substituting a suitable alternative

- Demonstrating interest in tour group members – and their past, current and future experiences, such as:

  - Where they have been

  - Where they are going

  - What they will be doing tomorrow/next week.

Generating confidence

In some instances there can be a need for the Tour Guide to generate confidence in tour group members in relation to interpretive activities.

Rationale

This may be required in order to:

- Optimise engagement with activities

- Enable people to get the most from their experience

- Demonstrate Tour Guide interest in individual tour group members and a willingness to help them

- Reassure people about the safety of activities

- Help customers believe they can do whatever is required.

Techniques

Confidence may be generated by:

- Talking about the activity and giving examples of:

  - What is required

  - What can be expected

- Demonstrating what to do

- Providing personal/one-on-one assistance

- Screening an instructional DVD

- Initiating interaction on a graduated basis – so the intensity of engagement increases as the skill/confidence of the individual grows

- Congratulating individuals on effort as well as achievement

- Encouraging people to continue trying.

3.6 Respond to questions

Introduction

Throughout all interpretive activities the Tour Guide is expected to response appropriately and professionally to questions asked by tour group members.

This section gives tips for answering questions and explains what to do if the answer to the question is not known.

Answering questions

Tips for answering questions asked as part of an activity include:

- Thank the person for the question – this encourages others to ask questions as it shows questions are actually welcomed

- Mention the person's name when thanking them – many participants wear name tags which can be used to identify who they are

    - This personalises the answer *and* people love to hear the sound of their own name

- Smile when responding – if appropriate – this is another way of showing providing answers to questions is not an imposition

- Use polite and respectful language – when replying, including the use of humour, where appropriate

- Provide a direct answer to the question which was asked – this means:

    - Giving a full, detailed, comprehensive and honest answer as relevant to the question

    - Not avoiding the question or re-directing or re-framing it

    - Being prepared to say "I'm sorry but I don't know the answer to that question." See below for more on this.

    - Never fabricating answers

- Ensure personal opinion in an answer is specifically identified as such – and not offered as fact

    - There is room when replying to some questions for the Tour Guide to offer personal opinions as part of certain answers (for example, questions asked regarding where to eat, the name of a good hotel, recommendations for other tours to take, identification of places to avoid) but it is important to make sure the customers know which part of the response it is

- Present the answers to the most appropriate 'target' – in some cases:

    - The answer is best given just to the person who asked the question

    - It is better to include the rest of the group in the response which is provided

- Respond promptly – taking care:

    - Never to rush the response

    - Not to appear curt

    - To not give the impression there are better things to be done

- Check the response has answered the question to satisfaction of the person who asked it – this can involve:

    - Encouraging another question

    - Enquiring if clarification is needed

    - Asking if illustration of a point is required.

Handling questions where the answer is not known

It is necessary to adhere to any organisational requirements which might apply to dealing with questions that cannot be answered.

Where no protocols exist the following are useful techniques:

- Apologise for not knowing – this is a standard 'customer service' response and needs to be done

    - The apology needs to be genuine and accompanied by appropriate supporting body language/facial expression.

- Maintain positive relations with the person/group – it is important:

    - Not to show annoyance at not knowing the answer

    - Not to be personally embarrassed about the lack of knowledge

    - Not to give the person who asked the question the impression they should ask no more questions

- Give information on an *associated* topic – which:

    - May give some generally broad detail in relation to the actual question asked

    - At least shows a willingness to respond even though the real answer is not known

- Refer the question to the rest of the group – to see if anyone else participating in the activity has an answer to the question

- Refer customers to sources that may provide the relevant information at the conclusion of the activity or tour – this may be:

    - Brochures, posters, handouts which are available at the point of disembarkation

    - A website

    - A Visitor Information Centre

    - A business, organisation or government agency/authority

- Make arrangements to research the question – at the conclusion of the activity or tour and:

    - Pass on the answer face-to-face at the point of disembarkation, if the person is willing to wait a few minutes

    - Send a reply via email to the person if they are able to provide an address

    - Give an SMS reply if they provide a number.

3.7 Respect environmental, cultural and social sensitivities

Introduction

Tour Guides and staff are always expected to demonstrate appropriate respect with reference to individual tour groups and individual activities.

This section considers factors relating to the need for respect to be shown by Tour Guides and staff to environmental, cultural and social sensitivities.

Pre-activity notification

Code of Conduct/Practice

In some circumstances there can be a need to follow strict protocols make tour group members aware of requirements which apply to an upcoming activity.

These protocols (often referred to as a Code of Conduct/Practice) often have to be observed when:

- About to enter a local/host community or area

- The Tour Operator belongs to a body/association who requires the Code to be communicated to customers and followed while 'on site'

- Such agreements have been negotiated with the people from an area/the lands to be visited.

Notification about the requirements of the Code will commonly take the following forms:

- Inclusion of a hard copy of the Code in materials handed out to tour group members either:

  - When they buy/receive their tickets

  - As part of a pre-tour briefing

- Verbal communication to customers – which may occur:

  - On the tour vehicle as the destination for the activity approaches

  - As part of a formal pre-activity briefing.

Generic considerations

General considerations relating to Codes include:

- Determination of 'unacceptable' behaviour of tour groups and individual participants – as relevant to each site/community

- Requirement for all tour groups to be briefed by Tour Guides before entering the community – highlighting what is deemed to be 'acceptable behaviour' in accordance with a prepared script developed in consultation with the local community

- Need for Tour Guides to intervene where necessary – and bring unacceptable behaviour by tour group members back in-line with what is required

- Need for adherence to all agreed/negotiated arrangements – at all times by all groups

- Consequences which apply for non-compliance.

Topics often covered

Activities often addressed by these Codes may include:

- Parking only in designated areas

- Staying on designated walking tracks and agreed pedestrian routes

- Prohibiting taking of photographs – of certain areas or of people

- Banning use of limited/scarce local resources – such as water

- Identifying and banning carriage of nominated items/products onto community lands/property (such as fast food, newspapers, bottles)

- Cleaning up after using facilities – or a ban on using facilities.
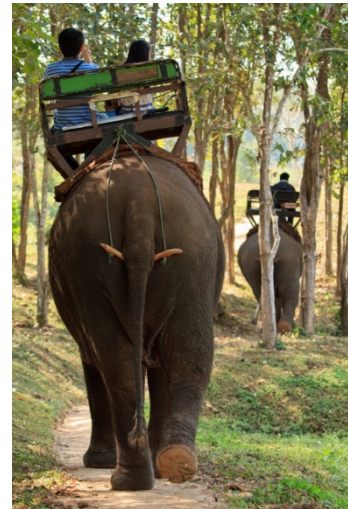
Environmental sensitivities

Environmental issues (and hence *sensitivities*) may be related to:

- Minimising impact on the environment

- Redressing previous adverse impact on the environment - rehabilitation.

For the purposes of this section 'the environment' must be seen in its broadest context to embrace the widest range of topics relating to:

- Land

- Flora

- Fauna

- Natural resources – conservation of water and air

- Pollution – including soil, water, air and noise pollution.

Respect for environmental sensitivities may be demonstrated through actions such as:

- Not using local resources

- Limiting/restricting/rationing use of local resources

- Removing all rubbish created by the group/activity

- Staying on designated tracks, paths, areas

- Not picking the flowers

- Staying a set distance from wildlife

- Using only specifically identified and agreed areas for activities

- Limiting number of visits to the area

- Restricting number of tour group members and duration of activities

- Banning carriage of nominated items (known to cause damage/pollution) into the area

- Confining interpretive activities only to approved actions which have been agreed to by local/host communities

- Helping local communities in whatever way they require in order to rehabilitate and/or conserve their environment – as agreed through consultation and negotiation.

Cultural sensitivities

For the purposes of this section, cultural issues (and hence *sensitivities*) may be related to:

- Religion

- Race

- Language and symbols

- Norms, beliefs and assumptions.

Respect for cultural sensitivities may be demonstrated through:

- Attending/participating in 'cultural awareness' training as part of standard Tour Guide training

- Learning about the meaning of a range of non-verbal communications relevant to the culture/s of people who are regular tour participants – to avoid giving unintentional offence

- Speaking in language that can be understood by tour group members

- Providing written material in different languages

- Not pre-judging/stereo-typing people based on their obvious cultural indicators

- Avoiding comments and jokes which are related to specific cultures

- Checking to ensure symbols, examples and activities used as part of an activity are culturally appropriate

- Refraining from comments which can be interpreted as being culturally-based

- Embracing/including all tour group members in conversation, provision of assistance, interaction and other activities

- Not joining in when/if customers engage in culturally inappropriate behaviour or language

- Intervening when a tour group member says or does something which is culturally insensitive

- Acknowledging differences and embracing diversity

- Offering all tour group members the same opportunity to engage with activities

- Avoiding any form of *negative* discriminatory behaviour or language

- Being patient and understanding.

Social sensitivities

Social issues (and hence *sensitivities*) may be related to matters involving:

- Personal values and norms

- Family units

- Individual circumstances

- Age

- Gender and sexual identity

- Disability.

Respect for social sensitivities may be demonstrated through:

- Acknowledging personal rights and freedoms

- Not judging people by their actions

- Supporting and helping individuals who are experiencing personal difficulties and hardship when on-tour and/or as they participate in an activity

- Using inclusive language

- Not making inflammatory remarks/comments when an individual's social issue/s cause delay or disruption to other tour group members

- Appreciating individual differences

- Intervening when a tour group member says or does something which is insensitive to a person's social circumstance/s

- Refraining from making personal comment about a person's social circumstances, choices or arrangements

- Treating everyone equally **but** being ready to provide extra attention/assistance to those who are challenged or disenfranchised by virtue of social factors

- Catering for disabilities as required/notified in advance

- Showing understanding/empathy for people's thoughts and feelings.

3.8 Adjust presentation to suit emerging requirements

Introduction

Professionalism in delivery of an interpretive activity requires modification of 'standard' presentation to suit the emerging needs of the group.

This section indicates the need for this action, highlights the unique nature of every interpretive activity and describes protocols which are inherent in this consideration.

Rationale

There is an ongoing need to monitor the activity and adjust it to suit emerging requirements in order to:

- Optimise customer enjoyment and engagement
- Accommodate and respond to general issues arising for the group
- Keep the activity on schedule and the tour running according to the itinerary
- Cater for individual needs, wants and preferences as they are identified
- Demonstrate customer-focus and a genuine service ethic.

Unique nature of every activity

The actions required to effectively adjust presentations for each interpretive activity will vary with each tour and activity.

It is important to remember every activity is a unique event even where the title/name of the activity is the same.

No two interpretive activities are really ever the same because of the dynamic mix of:

- Tour group members – by age, gender, background, experience, expectations and number
- Activity type – and the whether or not the activity is essentially:
  - Passive or active
  - Observational or participatory
  - Group-based or individual
- Location – in terms of the changes which can occur as a result of crowds, weather, seasons and equipment/resources factors.

Possible activities

In this context the possible activities which may need to be implemented are such they are not provided for by emergency or contingency plans.

These adjustments will need to be made on-the-spot by the Tour Guide based on:

- Feedback from the group

- Local factors

- Personal experience

- Common sense

- Knowledge gained about the tour group members

- Knowledge held about the tour/activity to-date and the remaining inclusions and activities on the tour.

With this in mind adjusting presentation may require:

- Changing the basic tenor of an activity – which may mean:
  - Switching from an active to a passive orientation
  - Allowing the tour group to determine their approach to the activity rather than insisting the plans for the activity are followed

- Altering the pacing of the presentation – by (for example)
  - Speeding up or slowing down commentary
  - Adding more information or omitting 'nice to know' information and presenting only the 'need to know' detail

- Changing the scope of the activity itself – by:
  - Adding new or different elements
  - Reducing objectives and/or dimensions of the activity

- Adjusting the duration of the activity – which may take the form of:
  - Making the activity longer or shorter
  - Breaking the overall activity up into smaller, discreet sections
  - Introducing breaks/rests periods into the activity

- Addressing the degree of engagement/participation of the tour group with the activity – which will commonly require either:
  - The tour group members to do more or less
  - The tour group members to do something different – such as something more active or less active/challenging/hands-on
  - The Tour Guide and/or tour staff members to do more or less

- Taking action in relation to the administration of the activity – which may require changes in relation to:
  - Monitoring of the group
  - Supervision of the activity
  - Provision of further advice
  - Feedback given

- Moving the location of the activity – to:
  - A better area given the nature of issues arising
  - A safer site
- Responding to initial assessment of participant physical ability – and conducting a subsequent re-assessment based on their *demonstrated* capacity
- Responding to changing environmental and other factors – including those related to:
  - Safety
  - Weather
  - Environment
- Abandoning the planned activity and initiating a substitute/alternative activity – where the original interpretive activity appears to be unacceptable and inappropriate to the group
- Allocating more and/or different resources, gear and equipment – to address resourcing issues which have occurred
- Being prepared to amend the itinerary for the tour in consultation with the group – where the presentation of *this* activity appears to warrant such a response
- Altering the level of communication and interaction with individuals and/or groups – to:
  - Make people feel more included
  - Address signs of distress, fatigue or other negative signals
  - Enhance the connection between Tour Guide and the individual.

3.9 Liaise with colleagues throughout the activity

Introduction

Throughout activities there can be a need to engage with various colleagues for a range of reasons.

This section identifies who these colleagues might be and discusses the nature of the engagement.

Colleagues

In this context 'colleagues' may include:

- Host communities – including:
  - Acknowledged community leaders
  - Designated elders
  - Nominated spokespeople or representatives
  - Vehicles operated by third party carriers in these communities
- Tour operator employees who are also part of the tour group – such as:
  - Tour managers
  - Drivers of coaches and other vehicles owner and operated by the Tour Operator
  - Employees responsible for loading vehicles and conducting pre-departure checks
  - Security and/or safety staff
  - Aides and assistants
  - Cooks
- Third party providers, joint venture partner and agencies – in terms of:
  - Drivers they use/provide
  - People provided to 'meet and greet' tour group members and to provide other services at and within activities
  - Caterers
  - Animal handlers
- Local and independent guides – who may be have a role to play in:
  - Leading part of the tour
  - Conducting an activity
- Designated/arranged persons ('Contacts') at destinations, suppliers and venues – including:
  - Hotels and restaurants
  - Attractions and sites
  - Retail shops

- Land owners and land managers – for areas which:
    - May be protected by legislation or regulation
    - May be subject to special listing and access requirements
    - Require payment of access/user fees on arrival
- Representatives of statutory authorities – who may need to be advised of:
    - Plans and intentions – for tours and activities
    - Projected usage of areas/sites
    - Numbers of visitors
    - Other detail as applicable to the individual agency/authority.

Nature of 'engagement'

Liaising with colleagues centres round a number of activities which require 'engagement' with people.

These activities are sometimes regular and predictable and (at other times) subject to the individual whims and vagaries of different customers and different activity types.

Generally these activities include:

- Responding to requests from people/colleagues for assistance – these can come from destinations, carriers and suppliers in cases where (for example):
    - They notify they are unable to provide normal services as previously arranged/expected
    - They advise scheduled activities cannot be delivered at planned times
    - The expected/organised meals and/or some other service cannot be supplied as arranged
- Asking them for assistance – as dictated by a wide number of potential reasons such as:
    - Seeking to accommodate special needs customers who have been identified as the activity begins/progresses
    - Requesting changes to normal arrangements – to accommodate issues arising as the activity proceeds
    - Responding to specific requests made by tour group members while participating in the activity
- Liaising with individuals and properties – in order to:
    - Make operational decisions
    - Alter planned arrangements
    - Advise of changes and issues impacting the activity, the tour and the itinerary
    - Keep people appraised of tour progress and where the tour 'currently' is and its expected arrival at other locations and activities

- Providing support for the work of others – such as:
  - Supplying information and facts as required by others in relation to the tour and operational details of individual activities
  - Passing on feedback received from tour group members about the activity and the tour
  - Assisting others complete their work as it relates to the activity
  - Integrating other/new requested work-related activities into standard interpretive activity protocols

- Anticipating requests from colleagues – and:
  - Responding positively
  - Responding proactively
  - Striving to achieve a mutually beneficial outcome

- Communicating with venues, sites, destinations and providers – and:
  - Confirming forward bookings
  - Advising sites and operators of expected arrival time, group numbers, special requests and timing constraints that may apply
  - Making arrangements
  - Negotiating changes to standard arrangements

- Making payment for services and products rendered according to previously agreed arrangements, or as required – to:
  - Suppliers/providers
  - Communities
  - Carriers.

3.10 Deal with unexpected events

Introduction

On some tours it may be necessary to deal with unexpected events and emergencies as part of an interpretive activity.

This section discusses the nature of 'unexpected events and emergencies' and looks at planning and action to take in response to these situations.

Unexpected events and emergencies

The nature of unexpected events and emergencies can vary with different tours and various activity types but may include:

- Systems failure – including significant technical and equipment failure

- Incidents relating to tour vehicle – such as:
  - Vehicle breakdown
  - Vehicle accidents

- Situations involving tour group members – which may result in:
  - Injury
  - Accident
  - Death

- Inappropriate customer behaviour – which is:
  - Impacting the enjoyment of the tour by other tour group members
  - Contravening expected codes of conduct

- Adverse weather conditions – including:
  - Unsafe or inappropriate local conditions
  - The impact locally (potentially and/or actually) of adverse weather conditions in a near-by or associated area – such as localised flooding caused by heavy rain in a near-by catchment area

- Unpredictable animal behaviour – such as:
  - Presence of wild animals
  - Creatures which are normally placid but are proving to be uncontrollable

- Problems with sites, venues and/or destinations – such as:
  - Impassable roads
  - Unexpected closures of sites
  - Unannounced restricted access to traditional areas
  - Permits and permissions for areas which were previously granted being revoked

- Unanticipated composition of tour group – that is, the tour group:

    - Is too large or small

    - Comprises people with unexpected demographic characteristics.

- Delays caused by tour group members – such as:

    - Delays in terms of tour group members returning to a muster point

    - Delays caused by participants re-boarding the tour vehicle.

Planning

Unexpected events and emergencies should be planned for, as far as practicable, so that contingency plans or emergency plans can be put into effect when required.

It is SOP for tours to have three types/levels of plans created for them:

- Operational plans – these are the standard plans to be implemented/followed if everything goes according to plan

- Emergency plans – to be followed if there is an accident or another prescribed emergency impacts the tour/activity

- Contingency plans – see below.

For plans to be effective several pre-requisites exist:

- They need to be properly and adequately resourced

- They need to trialled and tested

- The trials/tests needs to be reviewed and the plans revised, as/if necessary

- They need to be communicated to staff

- Demonstrations, practice and/or drills must underpin actual implementation

- They need to be reviewed and updated as tours and requirements/relevant issues alter.

Operations Package/Folder

All plans are prepared in advance/before the tour/excursion departs and provided for tour staff in an Operations Package/Folder that contains copies of all relevant plans for individual tours/excursions.

All plans are usually also available in soft copy form via various electronic options such as Iphones, pads or tablets.

Contingency plans defined

Contingency plans are plans prepared for tour staff to follow in case certain predictable, foreseeable or likely events actually materialise.

They are Plan B.

They detail what will be done when Plan A (what should *normally* occur as planned/as usual according to standard 'operational' plans) cannot happen/take place.

These events are not 'emergencies' (that is, they do not put life or property in danger) but they have the potential to cause:

- Disruption to the tour and/or delivery of an activity

- Disappointment to tour group members.

Need for contingency plans

Contingency plans are developed so plans are prepared to:

- Ensure tours/activities operate smoothly even when there are difficulties/problems

- Control costs, timing and activities where there is a need to deviate from standard operational plans

- Optimise potential of tours/activities to meet customer expectations even where unexpected situations occur

- Give direction to Tour staff when things go wrong or do not go as planned/expected

- Comply with legislation and legal obligations regarding delivering a tour that complies with advertisements.

Generic contents of contingency plans

Individual Tour Operators will determine the specific contents of their own contingency plans but generically speaking they will contain:

- Name/title of the activity – so there is clarity about the focus of the plan/the particular interpretive activity to which the plan applies

- Name of the Tour to which the plan applies – this is the name of any/every tour that includes the activity

- Relevant dates – including:

  - Dates plan was developed and approved for use

  - Review date for plan

- Trigger points for implementation – these points will vary between activities but each listed trigger point will:

  - Describe *general context* for activation of the plan

  - Illustrate with reference to specific examples of scenarios, situations and circumstances

  - Indicate when and why:

    – Alternate activities should be substituted

    – Planned/scheduled activities need to be abandoned and no replacement activity provided in its place.

    The Terms and Conditions which tour participants agree to when they buy a tour/ticket usually contains a statement allowing Tour Operators to substitute activities, cancel activities or in other ways amend/alter the advertised itinerary.

- Action to be taken – which will cover:
  - Alterations to announcements, demonstrations/briefings and advice to participants to be made in the event identified situations/circumstances occur
  - Changes which may be required to the activity itself – in terms of (say) adjusting with reference to specific causal factors:
    – Scope

    – Duration

    – Engagement/participation

    – Resource allocations

    – Monitoring and supervision of the activity

    – Location of activity
  - Presentation of detailed operational plans (in effect, the actual 'contingency plans') for alternate/substitute interpretive activities – which have been approved by management following necessary:
  - Risk management protocols
  - Costing
  - Other practical imperatives
- Required notifications – these may relate to:
  - Notifying management/Head Office
  - Advising other tours/Tour Guides
  - Communicating with local communities
  - Liaising with third party providers
- Prompts/lists of other factors which may potentially need to be considered as a consequence – these may include:
  - Adjustments to other interpretive activities
  - Variations to the itinerary
  - Acquisition of extra supplies/resources
- Need to complete specified internal report – at the end of the tour or activity to explain/address the issue.

Dealing with events and emergencies

In practice the *detail* of handling events and emergencies will be contained in the plans, but generically the requirements may include:

- Implementing contingency and/or emergency plans – as developed for each individual tour or activity
- Notifying authorities and/or emergency services – by phone or radio to obtain assistance
- The Operations Package/Folder for the tour will contain these plans and/or they may be available electronically

- Maintaining communication with tour group members – to:
  - Advise them of action they need to take to remain safe
  - Reassure them and keep them calm
  - Notify them of action to be taken by the tour in response to the unexpected event
- Prioritising action to be taken – this ALWAYS means optimising the safety of customers and placing the safety of people above the protection/security of property and assets
- Taking charge of the situation – by:
  - Assuming authority
  - Taking charge
  - Issuing directives to those on-tour/in the tour group
- Being proactive – in terms of:
  - Responding in an appropriate and timely manner
  - Taking action to minimise the adverse impact of the unexpected event on the conduct, and customer enjoyment of, the tour
- Apologising for the event – this is standard practice even where the cause of the situation is not the fault of:
  - The tour
  - The Tour Guide
  - The Tour Operator
- Adhering to host enterprise policies and procedures – with regard to:
  - Never admitting liability on behalf of the Tour Operator in relation to any event or incident
  - Not promising any form of recompense to those who have bought tickets/are on the tour
  - Referring customers to management, head office or to duty supervisor – on arrival of the tour back at the departure point, where applicable
  - Re-stating relevant statements in the Terms and Conditions of the tour – in relation to issues such as:
    – 'The Tour Operator reserves the right to substitute destinations, attractions, activities and inclusions as required'
    – 'Where there is a need to alter the advertised itinerary the Tour Operator will make every effort to replace the amended inclusion with an event/activity of similar type and value-for-money'.

3.11 Complete the activity

Introduction

An effective and efficient conclusion to an activity is an essential for all interpretive activities.

This section explains the need for a proper end to an activity and gives advice to optimise successful completion.

Need for a proper end

There is a need for a proper end to an activity because:

- The end of the activity is as important as the start of the activity
- The end of the activity is often the last thing the participant remembers – especially if it is not a positive conclusion
- Participants pay for the entire experience – not just the beginning and the 'middle'
- It shows professionalism and demonstrates planning and organisation
- It allows people to 'finish up' – whatever that might mean for them
- The activity needs to finish 'on time' – so that:
  - The itinerary can be maintained
  - Other activities booked for the same site/venue can take place.

Ways to optimise successful completions

Overview

Generic practice to deliver an effective and successful completion of an activity will focus on:

- Need to plan the closure/completion
- Need to prepare for the end of the activity
- Need to communicate – with:
  - Staff who are assisting
  - Stakeholders
  - Tour group members/participants.

SOPs

Standard protocols for ending an activity include:

- Remaining positive and 'up beat' – and not allowing personal energy/enthusiasm drop off towards the end of the activity
- Communicating with other tour staff and those working as part of the activity – in relation to:
  - Advising the activity will conclude in X minutes
  - Seeking confirmation from them it is appropriate to complete/finish up the activity
  - They should commence 'close down' actions as relevant to the individual activity

- Forewarning customers in relation to the closure/end of the activity – which may be accomplished through:
  - Making a public announcement – using as appropriate:
  - PA system
  - Megaphone
  - Loud voice
  - Speaking to tour group members – quietly and individually or in small groups
  - Ringing a bell or some other visual or audible warning
- Providing a staged-completion – that is, for example:
  - Stage 1: Advise of completion in 15 minutes
  - Stage 2: Advise of completion in 10 minutes
  - Stage 3: Advise of completion in 5 minutes
  - Stage 4: Advise activity is complete
- Initiating closing activities – which will depend on the nature of the activity but may include:
  - Dimming lights
  - Turning down sound/volume
  - Turning off equipment
  - Collecting items
  - Closing entry points
- Sharing feelings of the group/individuals – such as:
  - Amazement time has already passed and it is time to finish
  - Disappointment at having to leave
  - Enjoyment of the experience they have gained.

Post-completion activities

After activities have been completed there can be a need to:

- Count participant numbers/tour group members – to make sure no-one is missing/lost
- Retrieve equipment and items that were distributed to customers – at the start of the activity and/or throughout it
- Prepare equipment and items ready for the next activity/group – which may include:
  - Inspection
  - Maintenance
  - Cleaning
- Remove damaged or malfunctioning equipment from service – and:
  - Tag as 'Out of Service'
  - Arrange for replacements

- Complete necessary paperwork – which may relate to:
  - Timing/direction of activity
  - Group/participant numbers
  - Staffing
  - Resources used
- De-brief the group – to:
  - Share experiences
  - Identify lessons learned by the customers as a result of their engagement with the activity
  - Gather feedback about the activity
- Advise group of future arrangements – which may address:
  - Timing, location and nature of next interpretive activity
  - Return travel
  - Changes to the itinerary
  - Meals.

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.

Note: this Work Project follows on from the previous Work Project and forms the basis for the following Work Projects for this unit.

3.1   For the interpretive activity identified as the basis for Work Project 1.1 and 2.1 you are required to conduct the interpretive activity providing proof you have:

- Assemble tour group as required

- Provided commentary and interpretive presentation techniques

- Applied appropriate interpersonal skills

- Used prepared aids and materials and equipment to support presentation

- Encouraged audience participation, where appropriate

- Responded to questions

- Respected environmental, cultural and social sensitivities

- Adjusted presentation to suit emerging requirements

- Liaised with colleagues throughout the activity

- Dealt with unexpected events

- Completed the activity.

Summary

Conduct the interpretive activity

When conducting the interpretive activity:

- Assemble the group
- Check readiness and safety issues
- Recap basic requirements
- Encourage questions
- Provide scripted and unscripted commentary
- Follow the plan for the activity
- Interact with customers using appropriate interpersonal and communication skills
- Use a range of materials, resources and props to assist with presentation
- Involve and engage the customers
- Responding positively to questions
- Be sensitive to environmental, cultural and social needs of people
- Respect the local communities
- Modify the delivery/presentation as required to optimise satisfaction levels and maintain schedule
- Liaise with colleagues as required throughout the activity
- Use common sense and relevant plans to deal with unexpected events and issues arising
- Bring the activity to an organised conclusion.

Element 4:
Review the interpretive activity

4.1 De-brief with colleagues

Introduction

Standard Operating Practice is to review interpretive activities on a scheduled and regular basis.

This section defines reviews and gives reasons they are conducted, explores the role of a de-briefing when undertaking a review, identifies colleagues who may be involved in the process and describes a range of activities commonly used when de-briefing.

Reviews – defined

'Reviews' are evaluations of what has taken place.

They rely on research and evidence gathered as a result of the research.

Current thinking/management 'Best Practice' in this regard is to seek '360° feedback' – which means seeking feedback from everywhere/all stakeholders (all points of the compass), as opposed to only gathering information from a single source or a limited set of sources.

Rationale/s for reviews

Interpretive activities need to be reviewed to:

- Determine if the activities are effective – that is, if they are achieving their desired outcomes
- Assess whether or not the activities remain relevant – to the tour, to other stakeholders and tour objectives
- Identify satisfaction levels of tour group members – who have experienced/engaged with the activities
- Work out the extent to which the activities 'as delivered' in reality match:
    - Advertisements and claims made about the activities
    - Expectations tour group members have about the activities
- Calculate the cost of conducting the activities – to compare this against projections for cost
- Meet quality assurance obligations – as imposed under various QA schemes the Tour Operator might subscribe to/use
- Provide current and actual data to management – to help with decision-making regarding the operation of tours and inclusion of activities
- Confirm all management protocols remain valid and effective – in terms of (for example) controls, supervision, staffing, safety, ethical operations.

De-briefing

A de-briefing is a meeting with people/colleagues after an event (a tour or activity) has taken place.

It is undertaken to obtain feedback on:

- What happened

- What could be improved

- Problems occurring with the activity or tour.

De-briefings may occur:

- After every tour or activity – as a standard operating procedure to be completed before the tour/activity has been completely finalised

- After every X tours/activities – such as 'after every 10 tours/activities'

- At designated times – such as 'at the end of every week' or 'every 3 months' or on pre-determined dates

- One-on-one – where a Supervisor talks individually with staff members

- In a group environment – where all Tour Guides meet together:

    - Specifically for the purpose of providing feedback on tours/activities

    - For another reason (training, departmental meeting).

De-briefings may be supported by:

- Paper-based or electronic 'End-of-Tour/Activity reports' – that staff are required to complete as a mandatory element of their role

- Formal meetings with management – when employees believe an issue warrants such a meeting

- Comments from 'relevant others' – such as feedback from customers (see next section), input from third parties and/or contributions from stakeholders.

Colleagues

The colleagues who may be involved in the de-briefing might include:

- Tour Guides who present the tours and/or activities

- Drivers who assist with the tours/activities

- Internal sales staff – who sell tickets/tours/activities

- Agents and partners who assist in selling the tours/activities

- Presenters, performers and others used in the interpretive activities.

Activities involved

De-briefing activities may include:

- Soliciting verbal feedback – through:
    - Talking to colleagues when they return after a tour/activity
    - Raising de-briefing/feedback as a standing item at staff meetings

- Obtaining written feedback from colleagues – by:
    - Making it mandatory for staff to complete and forward designated forms/reports within given timeframes (after a tour/activity has been conducted)
    - Providing an electronic lodgement/reporting option
    - Providing a variety of *pro forma* reports/forms for certain circumstances where staff simply have to supply details/answers to listed questions/prompts

- Analysing written reports – in order to:
    - Identify issues
    - Determine causal factors
    - Decide action to take in response, if necessary
    - Resolve issues, if required

- Evaluating staff perceptions – about nominated topics such as:
    - Levels of customer satisfaction
    - Input by third parties
    - Suitability of resourcing
    - Feelings regarding the need for change

- Considering complaints received, or overheard, from customers – with a view to:
    - Determining legitimacy of issues
    - Taking appropriate action in response – which may include:
    - Letter or phone call of apology
    - Refunding ticket price
    - Providing complimentary ticket/merchandise or discounted offer.
    - Learning lessons to improve delivery and prevent recurrence

- Advising staff of upcoming activities and tours – regarding:
    - Special requests
    - Changes to schedules
    - Staffing arrangements
    - New Private/Custom tours which have been booked

- Thanking staff – for their input and on-tour efforts/work.

4.2 Seek feedback from customers

Introduction

In the same way Tour Operators seek input from their staff they also seek feedback from their customers.

This section identifies when and how this may occur.

Methods and timing

Customer feedback can be obtained in several ways, including:

- Making personal observations of customers by tour staff – in terms of:
  - Noting the body language of people – and watching their reactions:
    - At various locations and activities
    - When they arrive at certain destinations to being activities/tours
    - When/as they engage with nominated interpretive activities
    - Listening to what tour group members say:
    - As they take part in an activity
    - When they get back on board the tour vehicle after an activity
    - When they return after the tour has finished

- Soliciting written feedback provided by tour group members – in terms of:
  - Written Comments cards/feedback forms – as they leave the tour/Tour Operator's business at the end of a tour
  - Online feedback received – which is available any time for people to use
  - Letters of complaints and/or compliments received

- Using other market research techniques – such as:
  - Surveys and/or Response Sheets – such as Customer Satisfaction surveys conducted at the end of tours/activities
  - Targeted questionnaires – about activities and tours usually undertaken on a less frequent basis (say every 6 – 12 months)
  - Focus groups – undertaken an a scheduled/regular basis with a cohort of participants whose characteristics mirror those of target markets/tour and activity users

- Analysing comments made by and input received from third party providers, co-chair operators and/or joint-venture partners – on the basis of:
  - Formal feedback made to them by customers
  - Feedback initiatives they have implemented
  - Overheard comments.

Keys in the process

Important factors in relation to feedback from customers are:

- It must be asked for – there is a need to be proactive and (for example):
    - Ask customers to complete Customer Comment/Feedback cards
    - Move around customers asking for their completed cards/forms'
    - Clearly indicate on handout materials (including tickets, receipts, generic advertising information) the online and telephone options available
    - Inform partners and relevant stakeholders their contributions in this respect are expected
- The feedback process must be formalised – in terms of:
    - Being entrenched as part of SOP for the business
    - Having appropriate resources allocated to it
    - Conducting underpinning staff training
    - Being conducted on a regular/scheduled or ongoing basis
- Contributions received must be:
    - Acknowledged – so people know their input is valued and has been received
    - Recorded – for later evaluation
    - Investigated – where necessary
    - Analysed – to identify trends rather than one-off comments (unless such one-off comments are significant/important)
- Obvious requests/suggestions for change must not be ignored – the information provided via customer feedback is highly valuable customer data and no Tour Operator can afford to dismiss it lightly
- Changes made to interpretive activities and tours on the basis of feedback received from customers must be communicated to them – so they:
    - See demonstrated evidence of the customer-focussed nature of the organisation
    - Can see how their comments have impacted operations.

4.3 Evaluate actual performance against target performance criteria for the activity

Introduction

A standard element of many evaluations is to consider the extent to which each interpretive activity achieved its projected performance objectives.

This section discusses the concept of performance criteria and examines how *actual* performance can be judged against *expected* performance.

Performance criteria

In relation to interpretive activities, 'performance criteria' refer to the range of indicators selected by Tour Operators to help them determine the extent to which individual interpretive activities which were conducted achieved the objective/s set for them during the planning phase.

They are:

- Standards (criteria) against which performance is judged

- Sub-sets of individual objectives.

They can also be known as KPIs or 'evaluation criteria'.

There is no limit to what performance criteria can be used in an evaluation but they should have been clearly identified/described during the planning stage so staff/stakeholders know *in advance* how activities will be evaluated.

The one performance criteria can be used to help evaluate multiple objectives and interpretive activities.

Performance criteria will always differ between interpretive activities and may relate to (for example):

- Describing the physical, cost-related and physical/geographic parameters within which interpretive activities are required to occur/take place

- Expressing the required/anticipated level of satisfaction tour group members will experience from the activity

- Describing and quantifying the impact of activities on the environment, sustainability, local communities or other identified factors – such as infrastructure, business activity within local businesses

- Matching conduct/presentation of interpretive activities against advertisements and claims made – about what the activities will deliver

- Alignment between obligations the Tour Operator is under – in relation to requirements imposed by:

  - Legislation

  - Codes

  - Agreements and compacts

- Involving local communities and nominated groups or individuals – in the planning and implementation of activities

- Protecting nominated aspects of host communities – in terms of:

  ▪ Observing restricted areas

  ▪ Honouring agreements to keep identified information secret

  ▪ Ensuring safety and security of the population

  ▪ Providing required notifications and advice to visitors.

Evaluating actual presentation

The keys are:

- The stated performance criteria as stated in the plans are the standards which must be used – it is always possible/permissible to add extra performance criteria but at a minimum those developed during the planning phase need to be implemented

- Actual evidence, proof or data must be used in the evaluation – as opposed to relying on hunches or 'beliefs'

  In practice/reality:

  ▪ The information used for evaluation purposes may not always be objective data, but it should nonetheless be data as distinct from pure guesswork or a total lack of data

  ▪ There is often a need to undertake special activities/work to generate the required data for this purpose as (for example) standard Customer Comments/feedback do not always/usually address these criteria

- Statistical analysis is at the heart of the process – this means:

  ▪ Evidence needs to be quantified or presented in statistical form

  ▪ Analysis will need to be presented in some arithmetic format – such as in the form of percentage/s or ratio/s

- The evaluation itself is a simple process of comparing the projected/required/expected figure for each performance criteria as stated in the relevant plan with the findings of the actual data

- The process should result in the generation of findings – which may be/lead to:

  ▪ Expressed in terms of outcomes

  ▪ Written Recommendations or Suggestions

- The performance criteria used for the evaluation need to be reviewed and revised where necessary at every evaluation – to:

  ▪ Ensure they remain relevant to changing conditions, activities, contexts, objectives and target markets/audiences

  ▪ Fine-tune them so they can be better used to analyse and evaluate performance.

4.4 Revise operations on the basis of the review data

Introduction

The review process should guide and drive changes to tours, interpretive activities and general operations.

This section identifies possible actions which might flow from the evaluation process and suggests notifications for same.

Possible revisions

It is important changes to be made to tours/activities are based on evidence/proof as revealed by the evaluation.

In some cases there can be a need to discuss proposed changes with host communities to obtain their approval prior to making implementing the revisions.

There can be a need for the following once evaluation of interpretive activities and tours has been finalised:

- Undertaking new or additional risk management protocols – to ensure all proposed changes have has their risks identified and effectively controlled
- Altering plans – in terms of:
  - Operational plans – to enable achievement of new/revised operational imperatives, requirements, objectives and performance criteria
  - Contingency plans – generated to provide alternative activities/options
  - Emergency plans – where the new/revised activity has introduced an issue which needs to be addressed
- Acquiring extra or different resources – to enable the activities to:
  - Be conducted as intended
  - Cater for revised numbers participating in each activity
  - Provide items/equipment demanded by previous customers
  - Feature more modern/upgraded or 'better' resources
- Acquiring extra information – to:
  - Meet requirements new/revised inclusions
  - Cater for new/re-defined audiences or groups
  - Address deficiencies identified by customer feedback
- Preparing revised or new activities – to:
  - Accommodate newly identified requests/demands
  - Respond to valid criticism of previous offerings
  - Match the needs, wants and preferences of new/emerging markets

- Generating revised or new commentaries – to:
  - Provide information appropriate to new/revised inclusions, routes, content, objectives, activities
  - Reflect changes to the itinerary, travel routes and times
  - Incorporate specifics of new/revised activities
- Changing the promotional activities for the tour – in terms of:
  - Printed materials and signage/posters
  - Online content
  - Media campaigns
- Amending staffing for the tour – which may require:
  - More or less staff
  - More or less hours for existing staff
  - Different staff with different experience, expertise and skills sets
- Changing parameters relating to tour customers – which could mean:
  - Increasing or decreasing group size/numbers
  - Imposing or easing restrictions or limitations on participants – regarding (for example) age, fitness, mobility, disability
- Changing the itinerary for the tour – which may require:
  - Including new activities or removing previous activities
  - Altering the sequencing and/or location of activities in the tour
  - Modifying duration of activities.

Notifying the changes

All changes need to be communicated to:

- Internal trainers
- Host communities
- Tour staff
- Third party providers
- Any other stakeholder potentially impacted by the changes made
- Sales staff within the business
- Agents and partners
- The media.

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.

Note: this Work Project follows on from the previous Work Projects.

4.1 For the interpretive activity which formed the focus of the previous Work Projects you are required to (in a real or simulated setting) review the interpretive activity and provide evidence you have:

- De-briefed with colleagues

- Sought feedback from customers

- Evaluated actual performance against target performance criteria for the activity

- Revised operations on the basis of the review data.

Summary

Review the interpretive activity

When reviewing the interpretive activity:

- Understand the need/s to evaluate
- Establish a scheduled system of evaluations
- Develop detailed plans for evaluations
- Communicate evaluation arrangements and support with necessary training
- Implement the evaluation plan
- Involve staff and other relevant stakeholders
- Ensure customer feedback is a prime source of information on which evaluations are based
- Obtain feedback through a variety of options/methods
- Actively seek out feedback
- Make acquisition of customer feedback a regular/ongoing practice
- Record all feedback generated/received
- Evaluate activities against pre-determined objectives and criteria
- Use actual data/evidence as the basis for evaluations
- Never ignore customer feedback
- Thank customers and acknowledge their feedback
- Revise activities and tours on the basis of the findings of evaluations
- Communicate revisions made
- Provide resources and support for changes made.

Trainee Manual
Conduct interpretive activities in the field

Presentation of written work

1. 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.

2. Style
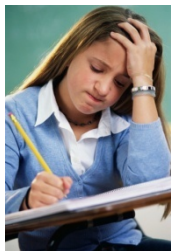
Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence 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.

3. Presenting Written Work

Types of written work

Students may be asked to write:

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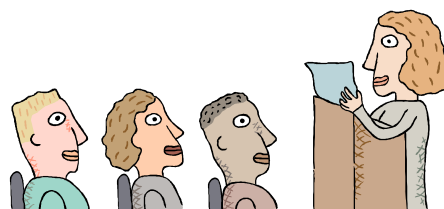
Format

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

Cook, Roy A & Hsu, Cathy H. C & Marqua, Joseph J 2015, *Tourism : the business of hospitality and travel*, Fifth edition, Boston Pearson.

Crabtree, Alice & South West Institute of TAFE (Warrnambool, Vic.). Training Resources and Development Service 2000, *Plan and develop interpretive activities*, South West Institute of TAFE, Warrnambool, Vic.

Field, Gil & Western Australia. Department of Conservation and Land Management 2000, *Developing ecotours and other interpretive activity programs : a guidebook for planning, designing, promoting and conducting ecotourism activity programs*, Dept. of Conservation, Como, W.A.

Pastorelli, John 2003, *Enriching the experience : an interpretive approach to tour guiding*, Pearson Education Australia, Frenchs Forest, N.S.W.

Trainee Manual
Conduct interpretive activities in the field

Trainee evaluation sheet

Conduct interpretive activities in the field

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:

_____

_____

_____

_____

The worst things about this unit were:

_____

_____

_____

_____

The things you should change in this unit are:

_____

_____

_____

_____

Trainee Manual
Conduct interpretive activities in the field

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.

Conduct interpretive activities in the field

		Yes	No*
Element 1: Make on-tour preparations			
1.1	Implement interpretive activity plans	☐	☐
1.2	Schedule the interpretive activity	☐	☐
1.3	Prepare on-tour requirements to support the interpretive activity	☐	☐
1.4	Confirm operational details with colleagues	☐	☐
1.5	Ensure safety issues have been addressed	☐	☐
1.6	Provide for maximum engagement by customers	☐	☐
Element 2: Introduce the interpretive activity			
2.1	Alert people to the up-coming interpretive activity	☐	☐
2.2	Welcome customers to the interpretive activity	☐	☐
2.3	Explain the interpretive activity	☐	☐
2.4	Demonstrate necessary pre-requisites for the activity	☐	☐
2.5	Confirm customer understanding regarding the up-coming activity	☐	☐
Element 3: Conduct the interpretive activity			
3.1	Assemble tour group as required	☐	☐
3.2	Provide commentary and interpretive presentation techniques	☐	☐
3.3	Apply appropriate interpersonal skills	☐	☐
3.4	Use prepared aids and materials and equipment to support presentation	☐	☐
3.5	Encourage audience participation, where appropriate	☐	☐
3.6	Respond to questions	☐	☐
3.7	Respect environmental, cultural and social sensitivities	☐	☐
3.8	Adjust presentation to suit emerging requirements	☐	☐

		Yes	No*
3.9	Liaise with colleagues throughout the activity	☐	☐
3.10	Deal with unexpected events	☐	☐
3.11	Complete the activity		
Element 4: Review the interpretive activity			
4.1	De-brief with colleagues	☐	☐
4.2	Seek feedback from customers	☐	☐
4.3	Evaluate actual performance against target performance criteria for the activity	☐	☐
4.4	Revise operations on the basis of the review data	☐	☐

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, pleaseprovide details of the extra steps or work you need to do to become ready for assessment.