Conduct pre-departure checks

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

Trainee Manual

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

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Trainee Manual

Specialist centre for foods, tourism & hospitality

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

The ASEAN Secretariat is based in Jakarta, Indonesia.

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

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Introduction to trainee manual

To the Trainee

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

The 'toolbox' consists of three elements:

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

The first thing you 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 pre-departure checks

This unit deals with the skills and knowledge required to Conduct pre-departure checks in a range of settings within the travel industries workplace context.

Unit Code:

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

Nominal Hours:

50

Element 1: Identify tour requirements

Performance Criteria

1.1 Identify itinerary for the tour

1.2 Identify group numbers on the tour

1.3 Identify supplies that can be obtained on tour

1.4 Identify special needs for the tour

1.5 Identify budget for equipment and supplies for the tour

1.6 Determine final requirements for the tour

Element 2: Prepare identified tour requirements

Performance Criteria

2.1 Obtain identified equipment and supplies

2.2 Check condition of equipment and supplies

2.3 Confirm quantity of equipment and supplies

2.4 Ensure compliance with host enterprise protocols for equipment and supplies

2.5 Acquire additional equipment and supplies, where needed

2.6 Verify identified equipment and supplies with tour staff

2.7 Develop checklist of all equipment and supplies for use when loading and while on tour

Element 3: Load identified tour requirements

Performance Criteria

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

3.2 Stow equipment and supplies

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

3.4 Conduct final check of all vehicles, equipment and supplies

Element 4: Complete documentation

Performance Criteria

4.1 Finalise checklists and supply sheets

4.2 Provide tour-related documents to guides and tour leaders

4.3 Forward documentation to external suppliers

4.4 Finalise documentation for tour members

4.5 Update internal inventory and stock control records

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: Identify tour requirements				
1.1	Identify itinerary for the tour	1.1	1, 2, 3	1
1.2	Identify group numbers on the tour	1.1	4, 5	2
1.3	Identify supplies that can be obtained on tour	1.1	6, 7	3
1.4	Identify special needs for the tour	1.1	8, 9	4
1.5	Identify budget for equipment and supplies for the tour	1.1	10, 11, 12	5
1.6	Determine final requirements for the tour	1.1	13	6
Element 2: Prepare identified tour requirements				
2.1	Obtain identified equipment and supplies	2.1	14, 15, 16	7
2.2	Check condition of equipment and supplies	2.1	17	8
2.3	Confirm quantity of equipment and supplies	2.1	18, 19	9
2.4	Ensure compliance with host enterprise protocols for equipment and supplies	2.1	20	10
2.5	Acquire additional equipment and supplies, where needed	2.1	21, 22	11
2.6	Verify identified equipment and supplies with tour staff	2.1	23, 24	12
2.7	Develop checklist of all equipment and supplies for use when loading and while on tour	2.1	25	13

		Work Projects	Written Questions	Oral Questions
Element 3: Load identified tour requirements				
3.1	Prepare loading sheet for each vehicle or form of transport to be used	3.1	26, 27	14
3.2	Stow equipment and supplies	3.1	28, 29	15
3.3	Use checklist/s to ensure all equipment and supplies are loaded	3.1	30	16
3.4	Conduct final check of all vehicles, equipment and supplies	3.1	31	17
Element 4: Complete documentation				
4.1	Finalise checklists and supply sheets	4.1	32	18
4.2	Provide tour-related documents to guides and tour leaders	4.1	33	19
4.3	Forward documentation to external suppliers	4.1	34	20
4.4	Finalise documentation for tour members	4.1	35, 36	21
4.5	Update internal inventory and stock control records	4.1	37, 38	22

Glossary

Term	Explanation
4WD	Four-wheel drive vehicle
Contingency plan	A plan detailing what will occur in the event normal events/plans cannot be implemented
Day trips	Tours which depart and return the same day
Coach	Bus
EPIRB	Emergency Position-Indicating Radio Beacon
En route	Along the way; during the trip/tour
Excursion	Another possible term used to describe a short tour
Extended tours	Tours lasting more than one day
FIFO	First In, First Out stock rotation principle
FIT	Fully Independent Traveller
FOC	Free Of Charge
Honorific	Title a person wants to be known by – such as Mr, Mrs, Ms, Miss, Dr, Father, Professor
Inclusions	Things ‘included’ in a tour – they may be side tours, merchandise, meals and/or refreshments, photographs, activities
Inventory	Stock-on-hand
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
Manifest	List of people on a tour together with other information as required by operator (tour group details, DOB of participants, contact person for each participant [NOK], ID provided)
Muster point	Location where tour group members meet
NOK	Next of Kin

Term	Explanation
PO	Purchase Order
PPE	Personal Protective Equipment (and clothing)
Pax	Industry term for number of people/tour group members
Plan B	Contingency plan
Q&A session	Question and Answer session
SOP	Standard Operating Procedure
Third party providers	External businesses/organisations who provide goods and/or services to trips/tours
UAM	Unaccompanied Minor

Element 1: Identify tour requirements

1.1 Identify itinerary for the tour

Introduction

One of the first steps in identifying requirements for a tour is to find out what the tour itinerary is.

This section defines a tour itinerary and examines a range of issues which may influence the work which needs to be done.

Context of the unit

This unit deals with the skills and knowledge required to conduct pre-departure checks for tours in a range of settings within the travel industries workplace.

Tours may also be referred to as trips.

Durations

Duration of tours/trips may be:

- Short tours – the duration of these will differ between providers and can vary from half-an-hour to half-a-day.

  These are sometimes referred to as 'Excursions'
- Full-day tours – where the tour departs and returns same day and the tour duration is around 8 – 10 hours.

  These are also known as 'Day Trips'
- Overnight tours – where the tour departs one day and returns the nest
- Multi-day tours – where the tour party has more than one night away.

  Common lengths are between 2-days to 14-days.

  These are also known as 'Extended' tours.

Classifications

Tours/trips may be:

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

  Also known as 'Port of Call' tours.

Purpose

The tour/trip purpose/focus may be:

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

See also 'Kinds of tour/types of tourism' at http://www.slideshare.net/lykmrsnmndz/kinds-of-tour.

Transportation

Transportation for these tours/trips can be provided by any one of a multitude of options which can include but is not limited to:

- Water – cruising, sailing, rafting
- Air – aeroplane, ballooning, helicopter
- Vehicle – coaches, 4WDs
- Animals – horses, camels, elephants.

Destination/s

The trip/tour may be:

- Local – staying in the area relatively close to where the tour departs
- In-country – where the tour covers destinations within the country
- International – where the tour/trip visits other countries.

Why are pre-departure checks conducted?

Pre-departure checks are conducted to:

- Ensure the tour runs smoothly
- Meet customer expectations
- Discharge Duty of Care and other legal obligations
- Make sure all necessary items are loaded for the tour
- Support tour guides and other tour staff.

Itinerary – defined

AirAsia.com

Travel Itinerary

Skip the queues! Web Check-In 7 days before

Be on time! Counter closes 45 minutes before

Get the seat you want with Pick A Seat

25% less for Pre-Booked Meals

Supersize your baggage online & save more!

Check & change online via Manage My Booking

Booking Details

Booking Number:
OCR5

Booking Date	: Thu 17 May 2012
Name	: Dennis Sylvester, Hurd
Address	: 1001 420 Carnarvon St., New Westminster, V3L5P1, Canada
Contact	: 16045246197 (tel) 16046006556 (mobile)
Email	: DennisSylvesterHurd@gmail.com

Guest Details

1. MR DENNIS SYLVESTER, HURD	2. MR JAYANTHA WATHAWANA, WITHANAGE

Flight Details

Flight	Departing	Arriving
FD2753 ECONOMY PROMO	Bangkok (BKK) Suvarnabhumi International Airport Sat 26 Jan 2013, 1625 hrs (4:25PM)	Yangon (RGN) Yangon Sat 26 Jan 2013, 1710 hrs (5:10PM)
FD2752 ECONOMY PROMO	Yangon (RGN) Yangon Mon 11 Feb 2013, 0830 hrs (8:30AM)	Bangkok (BKK) Suvarnabhumi International Airport Mon 11 Feb 2013, 1015 hrs (10:15AM)

An itinerary is the plan for a trip or tour.

An itinerary is commonly provided for every tour/trip (and all travel) sold and provided to the client/tour group member.

It may list:

- Name and contact details of the organisation which has organised/sold the trip, tour or travel
- Name of client
- Dates and times – of travel (arrivals and departures) as well as trip time
- Destinations, areas/regions, towns and venues/attractions to be visited
- Activities and inclusions
- Modes of travel
- Transportation details – such as type of vehicle used, name of vessel, flight number
- Accommodation arrangements – name of facility (hotel room or camping), dates
- Terms and conditions – for carriers, accommodation and other service providers
- Specific requirements relating to the travel/destinations – such as:
  - Visa requirements
  - Health issues
  - Time to arrive prior to departure
  - Customs and immigration requirements.

Internet examples of itineraries

See:

- http://bodymindspiritjourneys.com/thailand-tour-sample-itinerary.html
- http://www.audleytravel.com/destinations/southeast-asia/cambodia/itinerary-ideas.aspx
- http://www.gobaguio.com/itinerary.html#.VAO39aOaKho
- https://www.nrao.edu/greenbank/motorCoachMailer.pdf

Obtaining the itinerary

Ways to obtain the itinerary are:

- Speak to management – who will advise what is happening/required
- Refer to standard trip details – where the trip is a normal tour
- Look at the client file – where the tour is customised or is a private trip
- Talk to other staff – this involves speaking with employees who have worked on/with previous similar trips/tours.

Reasons to obtain the itinerary

In terms of obtaining the itinerary it is standard practice to obtain a **hard copy** of the itinerary to serve as a basis for:

- Identifying the itinerary – that is, being able to identify the details of the trip/tour (as identified above) which gives a **general feel** for and understanding of what will be necessary for the trip/tour
- Establishing **specific nature** and purpose of the tour – these will/can vary between tours depending on:
  - Client/tour group party and their individual or special requests/needs
  - Title/name of the trip/tour
- Identifying duration of the trip/tour – this is a key and relates to:
  - Departure and arrival dates – these are the dates the tour leaves the office/agency, and arrives either at destinations or back at the office/agency
  - Days and nights away – nights away is always one less than days away
  - Any specific timing considerations – such as the non-negotiable need for the tour group to be at a location at a specified time.

    These considerations are important to ensure the tour integrates with other activities or events, such as the need for the tour party to:
    - Be at a sporting pavilion in time for the game to start
    - Be present at feeding time for the animals
    - Be seated for meals at a hotel/external provider
    - Arrive at an accommodation venue.

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

1.2 Identify group numbers on the tour

Introduction

When the itinerary for a trip/tour has been obtained the next step is to identify the tour group numbers.

This section identifies relevant industry terms, suggests how group numbers might be determined, explains why it needs to be done and discusses related issues.

Identifying industry terms

People on tours may be referred to by a range of names.

Individual operators have their own preferences.

Options include:

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

Identifying tour group numbers

How to do it

Identifying tour group numbers can be done by:

- Counting tickets/places sold – this is the most common method for all tours.

  This is commonly done by:
  - Counting ticket stubs
  - Counting duplicate tickets
  - Referring to a database
  - Talking to sales staff
- Checking the client file – for private and custom tours
- Speaking with management – to get input they may have received from clients and/or joint venture operators
- Talking to tour and counter staff – who may provide information to assist in relation to:
  - Numbers normally experienced on similar tours
  - Personal knowledge regarding the individual up-coming trip based on feedback from participants and/or comments which they have overheard.

Why do it?

When identifying tour group members this must be done to determine:

- The number of tour members/participants – in total
- Those who will depart and/or join the tour along the way – in terms of:
  - Their names
  - Destinations/locations where they will join or leave the tour.

  The above two factors have obvious implications for **the quantities of resources** which need to be provided/arranged
- Classification and quantification of nominated group on the trip – such as:
  - Men and women
  - Adults, children and babies/infants
  - Age groups.

  Requirements in this regard will depend on the individual trip/tour trip – sometimes these details are necessary and important; sometimes they are not
- Potential usage of participants – this needs to be assessed for each activity, at each location and for every service and/or product advertised.

  Information gained from previous tours coupled with personal experience and common sense form the basis for this.

  The above two factors have obvious implications for **the nature of resources** which need to be provided/arranged.

In combination, then, identifying group tour numbers and profiles is the basis for determining the resources and requirements which need to be loaded and/or otherwise arranged for the tour/trip.

Point to note

Some operators, for some tours, will require a standard loading of resources for a tour **regardless of numbers booked**.

This is called 'par stock' for the tour.

Other relevant tour/trip documentation

Depending on the tour type there can also be a need to obtain additional documentation relating to the tour.

Documentation may be required to:

- Give to tourist guides/tour staff – for their use on the tour
- Load onto the tour vehicle
- Forward to third party providers
- Form the basis of internal protocols (for administration and financial performance purposes) associated with preparing, checking and loading vehicles prior to a tour.

This documentation (names of individual documents can/will vary slightly between different operators) can include:

- Passenger lists – this can be:
  - List of numbers on the tour with no further details
  - That is, the list does not distinguish by age, gender or any other characteristic
- Manifests – these are detailed versions of 'Passenger List' containing information such as:
  - Names
  - Age
  - Date of Birth
  - Passport number/details
- Seating lists – identifying seating arrangements (especially priority or preferential seats [window seats; front of bus; aisle] which have been requested/paid for) by name
- Rooming lists – this is a list of tour group members by name showing the room number they are staying/roomed in at accommodations venues used by the tour.

  Rooms may be shared or single
- Passenger profile sheets – these are not common/regular documents but can be prepared where individual groups or tour group members have special needs or have made special requests
- Technical or operations itinerary – this is an itinerary released only to and used only by tour staff.

  It reflects and enables the itinerary provided to tour group members but lists details necessary for staff to keep the tour on-time and conduct activities when scheduled
- Catering information – this may be used where the tour requires any form of catering to be provided.

  It can apply to:
  - Tour-provided catering – where the tour supplies (for example):
    - Refreshments – such as tea, coffee, water and biscuits
    - Basic food – such as pre-packed meals or on-site cooking
  - Third party provisions – in terms of:
    - Snacks
    - Meals
    - Drinks
    - Take-away food
- Itemised lists of required supplies and equipment – known as 'Supply Lists' these can form the basis of Loading sheets and help standardise provision of items for tours and guarantee all required items are provided.

  These sheets will vary between tours: more information on these will be provided in section 1.5

- Checklists – which are used by some operators to:
  - Guide inspections and checks to be undertaken at various stages and for nominated topics before a trip/tour departs
  - Provide proof required protocols have been followed to ensure pre-departure checks and activities have been completed as required
- Basic fault reports – these are warnings/advice relating to identified items notifying there are certain faults with equipment which operators/tour staff need to be aware of but which do not mean the items are unsafe or cannot be used
- Weather reports – depending on the duration for the tour (or the season of the year).there may be a need to include a current weather forecast/report
- Road report – in some cases it is standard practice to access a nominated website which lists local road closures and/or road issues which tour leaders/drivers need to be aware of.

1.3 Identify supplies that can be obtained on tour

Introduction

Many tours will augment the items allocated/provided to tours with provisions from other suppliers while on tour.

This section presents a range of reasons for using third party providers, suggests ways to identify them and looks at various pre-tour arrangements which need to be undertaken in order to organise required third party provision.

Reasons to use third party providers

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

They are often used by tour companies because:

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

  This is often the case when it relates to perishable food items
- They give 'local flavour' to the tour and add an extra dimension for tour group participants – for example, when they dine and sleep in local establishments they get to experience the local conditions, culture and hospitality on a first-hand basis
- Use of third party providers can add an element of luxury and indulgence to a tour – to give a break from what may be otherwise Spartan and difficult conditions
- These providers are the only local options for the provision of items such as:
  - Food and beverages
  - Activities and rides
  - Local transportation
  - Local guides
  - Local knowledge and advice
- There may be a trade-off required by local operators or communities – for example, it may be a condition of entry to a community or area that:
  - Money is spent locally to help promote the economy
  - Local people are used to provide certain tour-related work to help create jobs and sustainable employment for the local population.

Cost-benefit analysis

Operators may undertake a cost-benefit analysis.

This analysis:

- Identifies items (products and services) available at different points along the tour
- Assesses their price and quality
- Evaluates suitability and integration of items into the tour
- Determines the decision to take supplies, or buy them *en route.*

While a cost-benefit analysis may be sound business practice in order to identify where items should be purchased this is not always possible as other factors (see above) often have to be factored in.

Ways to identify third party providers

A combination of approaches is usually the best way to identify the availability of third party providers/suppliers.

Traditional techniques are to:

- Speak to tour staff – who have experience in the relevant areas to be visited to see what they know about what is available and who may be able to supply
- Read the details of any arrangements entered into with local communities – which necessitate purchasing certain items/services from them as part of the deal in relation to accessing their area/land
- Conduct internet searches – using appropriate key words to refine the searches
- Use region-specific telephone books – to identify relevant businesses in the areas
- Talk to competitors who conduct trips/tours in the areas – to identify who they use and to learn from what they do
- Go to the regions/areas – and:
  - Visit potential providers and get to know them and what they provide and what they may be able to do for the trips/tours
  - View their facilities
  - Taste or test their products and services – to get a first-hand idea of their quality and relevant other factors.

Pre-tour arrangements

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

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

1.4 Identify special needs for the tour

Introduction

Standard practice is to identify if there is a need to provide resources for 'special needs' people on the tour.

This section defines/describes special needs customers and presents benchmark practices to address their tour/trip needs.

'Special needs' guests

Special needs can include those who:

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

Websites

It is useful to take a look at the following websites:

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

Operational limitations

All operators will strive to meet the needs of all their special needs travellers and tourists.

Indeed, legislation may require they do this.

However, there will always be limitations on what can be done in terms of:

- Staff who can be supplied
- Resources which can be provided.

Many operators will identify what they are able to do and what they cannot supply on their web page and/or as part of their standard Terms and Conditions.

Standard Operating Procedures

SOPs to address the requirements which may arise in relation to those with special needs:

- Check the 'Special request' forms for the tour – most operators have these forms which are available for customers and/or sales staff to complete.

  These forms identify the special needs of the person/group and their names so they can be identified and their needs catered for
- Read the contracts which have been prepared for customised and private tours – as these may be focussed on groups where some or all of the party have identified special needs.

  Custom tours are increasingly being organised for elderly, disabled and other special needs groups
- Adjust the standard provisioning for the trip/tour by supplying/loading necessary items as identified by the pre-tour notifications – this can require:

  - Providing handouts and other printed materials:
    - In languages appropriate for the identified special needs traveller
    - In large print for those with vision impairment
  - Making wheelchairs available
  - Supplying baby requirements – strollers/perambulators, basinets, baby capsules/seats/restraints
  - Arranging for special food needs to cater for religious, cultural and diet-related or medical conditions
  - Loading special headsets for those with identified hearting problems – in situations where the tour has a scripted commentary as part of the deal
  - Factoring in variations to standard equipment and supplies traditionally packed for similar tours – to ensure special needs are accommodated as required
  - Purchasing additional or new equipment and supplies – to ensure promises made and customer expectations are met: always make sure these purchases occur within budget limitations/allowances
  - Notifying destinations, attractions, joint venture partners, carriers and others of the special needs customers – so they too can prepare for their arrival and also meet their needs
- Complete necessary internal documentation to reflect action taken to address special needs – these may include:
  - Loading sheets
  - Requisitions
  - Purchase Orders
  - Internal advice sheets
- Pass on the identified special needs information to tour staff – such as the Tour Guides and/or Driver at the pre-tour briefing including advice regarding action taken to meet the identified need.

1.5 Determine final requirements for the tour

Introduction

All trips and tours are restricted by the budget set for them.

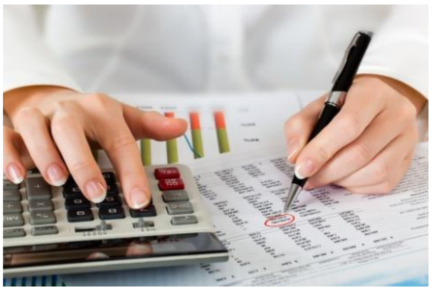
This section explains factors relating to budget, indicates how the budget for an individual trip/tour may be identified and presents examples of equipment and supplies which may need to be checked and loaded.

The budget and related factors

There is a general requirement all trips/tours are operated within a budget set by management.

The budget is set based on a combination of factors such as:

- Previous experience with similar trips/tours and general industry experience
- Prices charged – to the tour group members/customers
- Promises made about what will be provided – in advertisements and contracts/agreements
- Need to meet legally-imposed obligations – in relation to health, safety, security and other applicable issues
- Need to provide value-for-money to participants – so the trip/tour gains a good reputation which will enhance the potential for repeat and referral business
- Need to meet what the opposition is doing – so the trip/tour becomes a remains a viable option for customers
- Need for the organisation to generate a profit – to sustain the business and maintain and grow jobs.



Identifying the budget

Custom and private tours/trips

For custom and private tours the budget can be identified by:

- Reading the client file for the individual tour
- Talking to management
- Speaking with the sales staff/consultants that negotiated the deal for the trip/tour.

These tours/trips are all 'one-off' in nature so the resources and budget will likewise be unique for each individual trip/tour.

Other trips/tours

For other trips/tours (these are the normal/standard trips/tours conducted on a regular and ongoing basis) the budget is commonly pre-set and automatically factored into the resource sheets for each individual type of tour.

These sheets are known variously as:

- Loading sheets
- Stocking sheets
- Tour sheets.

Commonly:

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

  SOP is:

  - To contact them to request the Loading sheet for the trip/tour being serviced
  - For them to distribute the sheets at a start-of-shift staff briefing
- Administration/management monitor use of listed resources to determine:
  - If additional supplies/resources are needed
  - When allocation of resources needs to change based on feedback from tour participants and tour staff
  - If the amount of resources can be reduced
- Resources are **dictated** by these Loading/Stocking sheets – this means the sheets specify exactly what must be provided in terms of all resources.

  There is no room to adjust what is listed on these sheets.

  The sheets will either:

  - Allocate/identify the same items (by type and quantity) to every one of the same trips/tours: 'par stock'

    or

  - Calculate the resources to be provided (by type and quantity) based on ticket sales and known special requests/need to accommodate special needs.

Requesting extra resources

Where there is a need to obtain extra resources these must be requested from administration/management and there is always a need to get permission before supplying more resources than officially allocated.

There may be a need to:

- Identify and quantify what is required
- Explain/justify why it is required and which trip/tour the items are required for
- Complete a relevant internal document – such as a Request for Resources/Resource Request form.

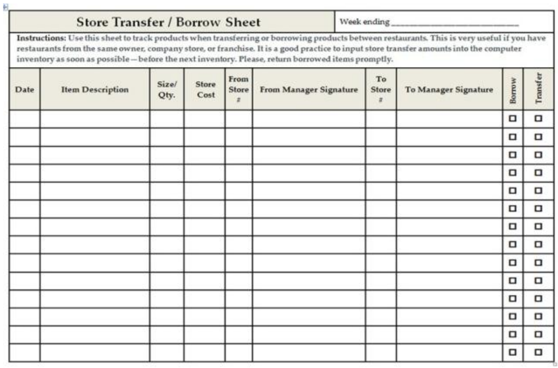
Common sense

There is always an expectation common sense is used when resourcing a trip/tour.

For example, if an item is listed for loading but is unavailable at the time then it is expected a substitute/alternate item is provided.

When this is done:

- This must be recorded – on the Stocking Sheet or on an Internal Stock Transfer (or similar) sheet
- Administration/management must be advised the item is out-of-stock – and a request for additional goods (via use of a requisition form or similar) made
- Staff on the trip/tour must be advised of the shortage/change made.



Store Transfer / Borrow Sheet

Week ending ______________________

Instructions: Use this sheet to track products when transferring or borrowing products between restaurants. This is very useful if you have restaurants from the same owner, company store, or franchise. It is a good practice to input store transfer amounts into the computer inventory as soon as possible – before the next inventory. Please, return borrowed items promptly.

Date	Item Description	Size/ Qty.	Store Cost	From Store #	From Manager Signature	To Store #	To Manager Signature	Borrow	Transfer
								☐	☐
								☐	☐
								☐	☐
								☐	☐
								☐	☐
								☐	☐
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								☐	☐
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								☐	☐
								☐	☐

Important point

Never fail to provide items listed for a trip/tour without advising tour staff.

It is vital they are advised so they:

- Know what the situation is – and are not caught unaware in an emergency situation, or when they go to use the item
- Can determine if action needs to be taken to address the situation
- Can work out an alternative plan of action which might accommodate this absence of expected resources.

Making special purchases

Where special purchases need to be made for trip/tour all internal protocols must be adhered to.

These protocols generally address issues such as:

- Need to obtain authorisation to make purchases – this may be verbal or in writing
- Need to follow standard organisational practices – which may include:
  - Obtaining quotations
  - Raising a Purchase Order
  - Buying from ‘preferred suppliers’
- Need to notify administration/management of extra costs/costs incurred – so these can be:
  - Allocated to the correct trips/tours
  - Factored into calculations relating to financial performance of the trips/tours
  - Passed on to tour group members so all legitimate expenses can be claimed back
  - Integrated into future resource allocations for upcoming tours/trips.

Equipment and supplies

There can never be a comprehensive list of all the equipment and supplies required for trips/tours.

The list below is simply a representative example of what may be required:

- Camping gear – including tents and bedding
- Catering gear – including cooking and food service equipment
- Maintenance equipment – such as tools, spare parts repair kits
- Recreational gear – to allow participants to relax, play games, have fun
- Educational items – such as props, sample items, handouts, models, equipment to enable demonstrations and identified practical sessions, and materials to support interpretive activities

- Communication equipment – for the vehicle being used, for tour staff and (where appropriate) for tour group members
- PPE – needed where the trip/tour includes activities requiring protective clothing and equipment
- Fuel – petrol, diesel, gas, batteries
- Water

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

1.6 Determine final requirements for the tour

Introduction

The final aspect of identifying trip/tour requirements is the need to determine final requirements for each event.

This section looks at what is involved in this critical aspect of the preparation.

Determining final requirements

Context

Determining final requirements for a trip/tour necessitates combining a series of activities which essentially revolve around:

- Double-checking what has already been done – essentially a verification process
- Communicating preparation activities to relevant others
- Actively searching/asking about last-minute changes and/or special requests
- Obtaining approval for planned resourcing and preparation actions to be implemented.

Examples of required activities

The activities required are:

- Confirming numbers – which **demands** checking to see if there are:
  - Additional tour party members – these may be referred to as:
    - Late Arrivals
    - Walk Ins
    - FITs
  - Last-minute withdrawals or cancellations
  - Variations in regard to where people are joining/departing the trip/tour
  - Significant variations in customer profiles – that is, sufficient to warrant altering the resourcing schedule/lists already prepared on the basis of (say) age, gender or other characteristics
- Checking what has already been done – to verify requirements have:
  - Been fully identified
  - Factored in the required safety factor margin by quantity/amount for nominated important items of equipment and supplies
  - Been properly calculated and are accurate and correct
  - Been suitably and professionally prepared for loading

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

Addressing issues

Where problems or short-falls in the provision of resources are identified, suitable action to address the situation must occur.

The decision about what to do in these situations may be made by management or the tour staff rather than the person who has responsibility for conducting the pre-departure checks.

Action to address the issue may require:

- Amendments to the itinerary
- Substitution of resources
- Allocation of extra resources
- Emergency purchase of items
- Arrangements for acquiring resources *en route*
- Organisation to enable required items to be taken to the tour group while they are actually on tour.

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 forms the basis for following Work Projects

1.1 You are working in an actual or simulated travel/tour organisation with responsibility for conducting pre-departure checks.

Describe or name the organisation and then identify and describe one trip/tour the organisation operates including date, time and other details as required.

For this trip/tour explain what you would/could do to achieve the following providing evidence of actual and/or possible/simulated practical application/implementation:

- Identify the itinerary for the trip/tour
- Identify the numbers who are going to be on tour
- Identify the supplies this trip/tour can obtain en route
- Identify special needs or requests for individuals in the group or the group as a whole
- Identify the budget for the tour
- Identify how final requirements for the tour will/could be finalised

Summary

Identify tour requirements

When identifying tour requirements:

- Read and analyse tour itineraries
- Determine organisational SOPs in relation to the process
- Obtain existing examples of previous actions for similar trips/tours
- Identify tour group numbers and profiles
- Name supplies which exist in the inventory and those to be obtained on tour
- Recognise special requests and special needs for every trip/tour
- Make sure of the budget for each trip/tour has been identified
- Treat every tour on its merits and needs
- Address rather than ignore issues
- Record action taken
- Understand the need to meet customer expectations
- Realise the importance of proper resourcing of trips/tours to the ongoing viability of the operator

Element 2:
Prepare identified tour requirements

2.1 Obtain identified equipment and supplies

Introduction

When requirements have been identified they will need to be obtained ready for loading or otherwise providing for trips and tours.

This section presents the standard actions required to achieve this objective.

Obtaining items

Objectives

The two key aims of this stage of the process are to:

- Physically acquire required resources
- Determine if additional items need to be ordered/purchased.

Actions

To achieve the objectives above there is generally a need to:

- Retrieve items from storage – as identified on relevant paperwork in terms of type and quantities which could/should include:
  - Counting of items – see section 2.3
  - Inspecting items/products – see next section
  - Stowing items in patrol boxes, tour wallets and other storage containers
  - Refrigerating and freezing foodstuffs
- Rotate stock – in accordance with standard stock control principles which traditionally require:
  - 'First In, First Out' rotation of stock, especially food and beverages
  - Checking inspection/testing or other compliance-related dates relating to internal and/or legislated need for safety checks for other items such as safety equipment, pressure vessels and medical supplies
- Record movement of stock – on nominated internal forms so:
  - Stock control activities can be implemented
  - Financial performance relating to use of resources can be calculated
  - Stock outages can be avoided
  - Inventory size can be managed/controlled

- Move items between tour groups – which can require:
  - Unloading stock from returning tours/vehicles
  - Completing paperwork to reflect returned stock/items
  - Transferring returned stock/items to out-going trip/tour
  - Updating records for out-going trip/tour to show items issued
- Transport items – to the trip/tour loading area:
  - Using trolleys and carts
  - Following safe manual handling protocols
- Order and purchase new items – see section 2.5 for details.

2.2 Check condition of equipment and supplies

Introduction

An important and constant element when obtaining required equipment and supplies for trips and tours is the need to check the condition of every item.

This section discusses activities necessary to achieve this.

Inspecting items

Checking the condition of equipment and supplies means **inspecting** each item.

These checks can therefore entail:

- Visually checking each item – to ensure it looks as it should and is clean, acceptable and appears 'fit for purpose'
- Spot cleaning of items – as required, such as:
  - Dusting
  - Wiping
  - Washing

- Providing basic repairs – as required by the condition of items and within individual scope of ability and authority.

  Many items will have to be:
  - Sent away for repairs/service
  - Forwarded to an internal department for maintenance
  - Repaired by technicians who need to be called in

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

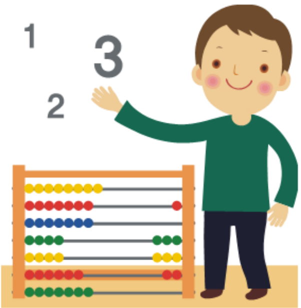
2.3 Confirm quantity of equipment and supplies

Introduction

It is always necessary to confirm required quantities of resources for trips/tours.

This section describes actions needed to ensure this essential aspect is covered and looks at documentation involved.

Practical actions



To help ensure the required amount/number of resources is provided to match identified requirements there can be a need to:

- Count each item – this can mean:
  - Identifying the quantity required from the Loading sheet
  - Finding the item in the store
  - Physically counting out each and every item – one-by-one
- Weigh or otherwise measure items – which may be required for:
  - Foodstuffs – to match the catering requirements for the trip
  - Fuel – for vehicles
- Match items to group numbers – using the accepted ratio for each item: see next section.
- Open **closed** boxes/cartons to confirm content/numbers inside – as opposed to simply *accepting* what is written on the box/container.

  This means there is a need to open and check/count inside:
  - Sealed cartons of goods – to ensure products match the description and there are no damaged/defective products
  - First aid kits – to make sure sufficient quantities of all required medical supplies are present and have not been used previously
  - Camping gear packs – to verify tent poles, guy ropes, tent pegs and other necessities by type and number
- Physically segregate items which have been obtained and counted – so they are not used by anyone else/not loaded for another trip/tour.

  This can involve:
  - Pre-loading onto a trolley/cart
  - Placing items into a designated staging area
  - Maintaining security of items to ensure nothing is taken or stolen.

Documentation and records

A range of records may need to be completed when physical resources are obtained or issued from stores.

These can include:

- Internal requisitions sheets – to order/support the taking of items from the store to trips/tours so administration can track their use for calculating financial performance of each trip/tour
- Internal transfer sheets – to reflect movement of stock/items from one tour/vehicle to another tour/vehicle.

  That is, the items has already been taken out of the store and allocated to a tour/vehicle but are being re-allocated to another tour/vehicle because they were not used for the initial trip/tour
- Bin cards – showing:
  - Where items removed from stock have been allocated
  - When they were taken
  - How many were allocated
  - Who authorised their removal and who took them
  - Amount of remaining stock-on-hand
- Database files and fields – showing the actual movement of stock items matched against planned movement as contained in the 'stock management' function of the database for the particular tour type/name in question
- Checklists – see next section
- Receipts – see next section.

2.4 Ensure compliance with host enterprise protocols for equipment and supplies

Introduction

There is a need to comply with all organisational practices and procedures when preparing identified trip/tour requirements.

This section explains why this is necessary and gives practical examples of what may be required.

Mandatory nature of this requirement

It is important to understand:

- All internal SOPs, policies and protocols relating to the identifying, issuing and obtaining of equipment and supplies for trips/tours must be complied with – this is a **non-negotiable requirement** for all staff every time they prepare a trip/tour.

  This means compliance is NOT optional

- Any problems or inability in complying with these requirements must be reported.

  Reports must be made:

  - To supervisor/management
  - Immediately – so a decision can be made straight away about remedial action to be taken
  - Verbally – explaining details of the issue/problem
  - With suggestions (if possible) about what can be done to effectively address the problem.

Need to comply with host enterprise requirements

The need to comply with host enterprise protocols for equipment and supplies is necessary in order to ensure:

- Every trip/tour is provisioned with all the resources required – the Loading Lists and similar have emerged over time as being the items vital to enable/support the tour as advertised
- Each trip/tour operates an a profitable basis – as the resourcing for each trip/tour has been determined and costed by management to optimise the financial performance of the business
- Trips/tours comply with legislated obligations – relating to the health, safety and welfare of tour group members and staff
- The products and services supplied satisfy customers – in terms of meeting their expectations, matching what has been delivered on previous trips/tours and honouring promises made in advertisements/promotions about the trip/tour.

Practical action

Host enterprise protocols for equipment and supplies may include:

Using pre-determined ratios

There is a commonly throughout the industry a need to apply pre-determined ratios to the resourcing of trips/tours.

This ratio will stipulate the amount of equipment and/or supplies for every tour group member while on tour.

The ratio provided by management:

- Has emerged over time as being what is necessary to provide the required level and standard of service and safety
- Is used to calculate costs and the financial performance of each trip/tour
- Is a **compulsory** figure which MUST be used when providing supplies/resources for a trip/tour – it is not open to interpretation or change
- Determines the final quantities of certain items to be supplied for some trips/tours.

  For example:

  - The ratio may be 1:1 for some items – that is, one item needs to be provided for every person
  - For other items the ratio may be 5:1 – that is, five items/per trip for every person.

Using checklists

Most operators use dedicated Checklists to assist with providing and checking resources for trips/tours.

See more in section 2.7.

Using receipts

It is SOP for receipts to be issued to verify/prove cash, vouchers and similar (company credit cards, travellers' cheques, company authorisations) were given to Tour Guides/Leaders.

A standard 'Receipt Book' is commonly used which will detail:

- Date
- Reference number
- Details of item/s
- Value
- Reason cash/item is provided
- Name of trip/tour
- Name and signatures of:
  - Person providing item/cash
  - Person accepting/confirming they have received the cash/item(s).

Providing mandatory equipment and supplies

For all/many trips and tours there can be certain non-negotiable requirements that must ***always be provided*** regardless of all other provisions and/or considerations.

This means despite other similar equipment supplied, the mandatory items must still be loaded for the tour.

Generally these items relate to equipment and supplies related to:

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

2.5 Acquire additional equipment and supplies, where needed

Introduction

Additional equipment and supplies may need to be acquired for some trips/tours.

This section looks at actions involved in, and options for, acquiring them.

Short-term responses

In the immediate short-term where extra resources are required it may be possible to:

- Move required resources from one place to another – this can mean:
  - Moving items from one tour vehicle to another
  - Shifting items from the prepared ‘tour stock’ (or staging area) of one tour to a tour about to depart or an activity about to commence
  - Taking resources out of the supplies/stock (store room) of the operator and re-locating to a tour, tour vehicle or tour group
- Source required resources by:
  - Contacting another tour operator (even a business which is in direct competition) and asking to borrow required items from them – in many cases there is an effective ‘working relationship’ for mutual benefit even between many fierce competitors
  - Telephoning suppliers and organising ‘emergency’ provision of required items – which might include:
    - The tour bus/vehicle picking up requirements en route
    - Paying a courier to make a special delivery of the required items from the supplier to the tour business
- Contact destinations and attractions – and making enquiries in relation to:
  - Whether they have their own resources as required which can be used by the trip/tour
  - If they are willing/able to loan or hire them to the tour operator
  - Determining quantities and condition/safety of their resources
  - Negotiating a mutually acceptable rental price.

Long-terms solutions

The business may elect to look at one or more of the following in terms of long-term plans to address issues raised by the need for additional resources:

- Acquire extra resources as identified –which may involve:
  - Purchasing more items
  - Leasing items
- Service damaged items – which means organising and providing repairs and maintenance in order to return unsafe/unusable items back to a required standard of serviceability so there is a bigger pool of items available to use
- Amend current standard tours – by:
  - Changing the itineraries and inclusions as necessary on the basis of the resource issue/s applying
  - Changing all internal and external advertising and promotional materials used to market the tour/s
- Develop new tours – on the basis of:
  - Removing inclusions, activities, destinations etc. which can no longer be included because of the resource issue – and not replacing these with anything else
  - Substituting alternative inclusions, activities, destinations for those which have been removed
  - Changing the name/focus of the tour
  - Altering the price of tickets for the tour.

2.6 Verify identified equipment and supplies with tour staff

Introduction

When equipment and supplies have been obtained the next step is to verify the resources with tour staff.

This section identifies and discusses the activities involved in this stage of the process.

Standard industry practices

Every organisation has developed its own protocols in this regard.

While all operators will follow *generally* applicable practices and procedures there will be workplace-specific variations to what appears below and these **must** be adhered to as they apply to each business.

Holding final planning session

For larger trips/tours there is usually a final planning session held two to three days before departure to identify last-minute requirements.

This is:

- A meeting with all tour staff
- A **detailed review** of the itinerary – matching all projected activities against 'resources required' (by type and quantity) for each activity on an activity-by-activity basis.

The objectives of the meeting are to:

- Confirm resources *provided* will actually meet resources *required*
- Identify deficiencies and need for extra/different resources.

Private and Custom tours

Where custom and/or private tours are being prepared it is common to:

- Invite host/tour group representative/s to attend, or
- Contact tour group representative/s by telephone to:
  - Get their final input
  - Identify last-minute requests
  - Confirm arrangements already made.

Undertaking final paper-based check

One SOP is the undertaking of a final paper-based consideration of the Loading list/manifest for equipment and supplies.

This involves:

- Sitting down with tour staff
- Giving each member of the tour staff a copy of tour details – that is:
  - Tour group numbers
  - Group profiles
  - Itinerary
  - Copies of contracts/agreements for private or custom tours
- Distributing copy of Loading sheet/manifest to each tour staff member
- Evaluating the contents of the Loading sheet/manifest – which requires:
  - Identification of materials provided
  - Analysis of projected use
  - Confirmation of resources provided
  - Identification of situations where *more* resources are required
  - Identification of situations where *different* resources are required
- Reviewing Operations Package/Manual – and checking, reviewing and/or confirming:
  - Emergency Plans
  - Permissions and permits – authorisations necessary to enter certain places/areas
  - Codes of Conduct – to guide behaviour in nominated areas in order to respect communities and cultures and/or enable responsible environmental actions
  - Contact lists – list of local offices, local personnel, phone numbers
- Determining course of action where extra/different resources are required – for example:
  - Supply of what is required – if budget/scope of authority allows
  - Request (with appropriate justification) to management for permission for extra resources
- Signing-off by tour staff on the Loading sheets as being appropriate for the trip/tour to be conducted.

Conducting physical check

The physical check of the resources may occur:

- At the same time as the paper-based check (described above) is undertaken
- After the paper-based check has confirmed the 'in principle' provision of supplies.

Conducting a physical check means:

- Going to the staging area for the trip/tour – where all the resources have been assembled
- Counting items – and confirming numbers on Loading sheets
- Inspecting equipment and supplies that have been assembled for the tour – to ensure they are as expected and in good condition
- Deciding on action to take – to address situations where the check reveals sub-standard, inappropriate or otherwise unsuitable items
- Signing off on the resources provided – on the loading sheet or a duplicate Checklist.

Becoming familiar with operation of resources

Where new/different resources are provided it is standard procedure for tour staff to become familiar with items before the tour departs.

It is not recommended for tour staff to have their first experience with new equipment and supplies on tour where their actions can be seen by tour group members.

Becoming familiar can involve:

- Distribution and reading of User Manuals/Operator Instructions or similar
- Demonstration of how to use items by manufacturers
- Opportunities for practice/drill with the items.

Inspecting tour vehicle

Another common practice is to physically inspect the tour vehicle(s) and trailer(s) as well as any support transport which will be used to re-stock/replenish the tour.

Inspections will:

- Check service to vehicle/s and trailers has been conducted as required
- Test operations of certain aspects of the vehicle – a Checklist is commonly used
- Verify registration and roadworthiness of vehicle/s
- Make sure vehicle is clean and properly stocked
- Feature a test drive of the vehicle.

Confirming contingency plans

Contingency plans are plans prepared for tour staff to follow in case certain predictable events materialise.

They are Plan B – they detail what will be done when Plan A (what should *normally* occur) cannot happen/take place.

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

Events which may trigger the need to activate a contingency plan include:

- Bad weather preventing implementation of a planned activity
- Unexpected closure of an advertised attraction
- Unavailability of a reserved accommodation venue
- Road closure preventing or delaying access to a destination
- Permits and permissions which were granted have been revoked.

Contingency plans are prepared in advance/before the tour departs and provided for tour staff, often in the same Operations Package that contains the Emergency Plans for the group/trip.

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

Confirming contingency plans for a trip/tour generally requires:

- Reviewing existing plans
- Modifying/adapting existing plans as applicable to reflect updated circumstances and/or known factors – such as:
  - Weather
  - Road conditions
  - Seasonal factors
  - Recent experience
  - Input from other tours/guides/operators
- Re-writing/revising plans – or creating new ones – and incorporating them into the Operations Package/Folder.

2.7 Develop checklist of all equipment and supplies for use when loading and while on tour

Introduction

Checklists are commonly used across the industry in relation to trips and tours

This section identifies uses for Checklists and practices involved in completing them.

Uses for Checklists

Checklists are prepared by individual tour operators.

They are developed on a tour-by-tour basis and differ for each trip/tour to reflect the individual needs of each trip/tour.

Items on these lists may vary between seasons.

Checklists can be used to:

- Make sure all required items are supplied
- Resources are provided (only) in the required quantity
- Prove the listed items were delivered/supplied as listed
- Verify the condition of the items – the checklists provide a method by which sub-standard or deficient items can be recorded (‘Missing’ or ‘Not Supplied’)
- Provide a basis for checking off items when the tour returns
- Enable calculation of ‘stock used’ by each trip/tour for the purposes of determining the financial performance of each trip/tour.

Other uses of Checklists

Checklists can also be developed to guide *actions required* in certain circumstances.

For example, operators may generate:

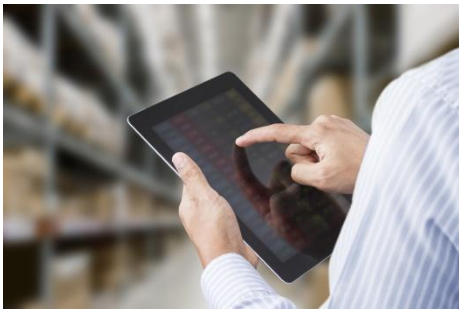
- A Vehicle Inspection Checklist which lists all the things to be tested and inspected on the vehicle to which the checklist applies
- A separate checklist for food and beverages – listing food handling protocols which need to be followed to optimise food safety, such as:
  - Date checking
  - Taking of temperatures for hot, refrigerated and frozen food
  - Completion of food safety records
- A pre-departure checklist identifying, in sequential order, the tasks to be undertaken before a trip/tour leaves.

Checklists within checklists

There can be situations where one checklist requires the user to use *another* checklist.

For example, the checklist for loading supplies for a trip/tour may indicate the need to load ‘First aid kit – 1’ and there can be an asterisk (*) indicating there is a checklist inside the First Aid kit which lists the supplies which must be provided by name and quantity.

Workplace practice



Checklists for equipment and supplies are used:

- By the person *issuing* the items for the trip/tour – who:
  - Identifies the items by type and quantity as listed on the checklist
  - Picks/obtains the items from the store – and:
    - Ticks off the items as being picked/selected

      or
    - Writes in the actual number provided if this figure is less than what is identified on the list
  - Adds unlisted items to the list – if extra items are approved for loading
- By the person *taking delivery* of the equipment and supplies – who:
  - Uses the checklist completed by the person provided the resources to count/check/verify all the listed items have been provided in the quantities stated
  - Writes on the form any discrepancies identified.

Signing the checklists

Signatures from both persons on the Checklist confirm the resources listed were supplied and received.

The signed and completed form is then:

- Forwarded to management/administration – for them to process
- Copied and filed for future use – such as:
  - To assist with queries
  - To serve as a reference point for supplying future trips/tours
  - To use for recording unused items returned when the trip/tour returns.

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 from Work Project 1.1

2.1 For the trip/tour identified in Work Project 1.1:

- Explain how identified equipment, services and supplies will be provided for the trip/tour
- Describe the procedures to be used to inspect and check the condition of supplies and equipment to be provided
- Identify how quantities of supplies and equipment provided actually meet identified need for the trip/tour
- Describe the internal protocols which need to be followed to ensure proper preparation of resources for the trip/tour
- Identify supplies, equipment and services which need to be obtained on tour identifying the name of possible suppliers
- Highlight how proposed supply of equipment and supplies will be communicated to tour staff and how they will verify intended provisions
- Provide detailed checklist/loading sheet(s) for the identified equipment and supplies

Summary

Prepare identified tour requirements

When preparing identified tour requirements:

- Match resources to identified requirements
- Adhere to budget limitations
- Comply with legally-imposed obligations
- Follow internal operational protocols
- Use nominated documents to record action taken and goods/services supplied
- Rotate stock
- Check condition of equipment and supplies provided for trips/tours
- Verify quantities supplied
- Acquire additional equipment and supplies as required by each trip/tour and within prescribed parameters
- Involve tour staff with decisions
- Use checklists and loading sheets as the basis for action

Element 3: Load identified tour requirements

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

Introduction

Loading sheets are used across the industry to guide and govern the loading of equipment and supplies for tours.

This section discusses preparation of these sheets for each tour.

The loading sheet

The following information gives a useful overview of the role of loading sheets – they:

- Are prepared internally by each operator – a template document usually exists on a computer and it is:
  - Printed off as required
  - Filled in (often by-hand) for each trip tour
- Are lists of equipment and supplies to be loaded onto individual vehicles/animals on a tour-by-tour basis – identifying items by:
  - Type
  - Quantity
- Are used to guide/govern actual loading of items into/onto vehicles or animals
- Are usually multipage documents – that is, each loading sheet for each vehicle for each trip/tour often comprises two-plus sheets which are stapled together
- Provide a record of items loaded for each trip/tour:
  - For record-keeping purposes
  - For calculating financial performance
  - For reference by tour staff
- Form the basis for ensuring all trips/tours depart with all necessary materials and can fulfil all applicable promises and obligations and meet all tour party expectations.

Loading sheets may look like this:

<table>
<tr><td colspan="6">Daniel Chee International Tours

LOADING SHEET
Vehicle – Name/Number:</td></tr>
<tr><td colspan="2">Prepared By:</td><td colspan="4">Reference No: A102 447</td></tr>
<tr><td colspan="2">Tour Name:</td><td colspan="4">Date: Depart Time:
Return Time:</td></tr>
<tr><td colspan="2">Pax: Adults
Children

Special Needs:</td><td colspan="4">Contract/Requests:</td></tr>
<tr><td>Item</td><td>Number Required</td><td>Number Loaded</td><td></td><td>Location</td><td>Comments</td></tr>
<tr><td>10 kg LPG gas cylinders</td><td>3</td><td>4</td><td></td><td>Roof rack</td><td>Extra approved - JB</td></tr>
<tr><td>25 x 25 ground sheet</td><td>4</td><td>4</td><td></td><td>Roof rack</td><td></td></tr>
<tr><td>EPIRB</td><td>1</td><td>1</td><td></td><td>Boot</td><td></td></tr>
<tr><td>!0-person tent</td><td>2</td><td>2</td><td></td><td>Cargo bay 1</td><td></td></tr>
<tr><td>Portable Medical kit*</td><td>1</td><td>1</td><td></td><td>Glove box</td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td colspan="2">Goods loaded: Signature/date</td><td colspan="4">Goods checked and accepted: Signature/date</td></tr>
</table>

Forms of transport

Loading sheets may need to be prepared for:

- Vehicles belonging to the tour organisation – most businesses will retain/use:
  - A bus/coach
  - A lorry
  - A van
  - A catering van/mobile kitchen
  - A variety of purpose-built trailers

- Vehicles belonging to/hired from a third party carrier
- Animals used for the trip tour
- Other tour vehicles required to carry supplies.

  While many tours using animals and push-bikes and/or motor bikes are supplied by 'support vehicles' (and/or purchase/acquisitions *en route*) there can be a need to carry certain/identified 'basic needs' on them.

Preparing loading sheets

Previous notes have identified activities necessary to determine the actual equipment/supplies required.

The basic activities in preparing loading sheets are:

- Printing off blank copies of the *pro forma* list/s – and writing in the items for each trip as identified.

  In some cases, the 'Number required' (the numbers identified as being needed) has been pre-entered by the system
- Writing in goods allocated for loading – under the 'Number Loaded' column.

  Part of this task must involve/include identifying equipment and supplies normally/commonly stowed on or in each vehicle (such as, for example, fire extinguishers, first aid kits, tools and spare parts), or method of transport to be used – these are still traditionally listed on the loading sheets as:
  - There needs to be evidence they have been checked/provided
  - Tour staff know they have actually been supplied and checked
  - Checking them every time a tour is prepared provides an opportunity to:
    - Verify their presence/existence – to make sure they have not been lost, stolen or used
    - Inspect them for suitability, completeness, appearance and similar

- Identifying where within each vehicle, or method of transport to be used, equipment and supplies are located – this will assist:
  - Inspection, checking and verification of items
  - Tour staff when they need to access items – an effort is always made to stow/load the same things into the same locations for each trip/tour and on all vehicles, where possible

- Undertaking calculations and deliberations to:
  - Distribute weight appropriately between and within vehicles – this is needed to:
    - Adhere to maximum loading restrictions
    - Optimise ride quality, safety, fuel consumption and passenger space
  - Share equipment and supplies between vehicles – to:
    - Minimise loss in the event of an accident
    - Speed up unpacking and re-packing when on tour

This needs to be done at this stage because, of course, loading sheets are 'vehicle specific' so it is necessary to determine which vehicle the different items will be loaded into.

If any last-minute changes are made when *actually* loading the vehicles these changes must be reflected on the loading sheets by changing them as necessary.

3.2 Stow equipment and supplies

Introduction

When loading sheets have been prepared the items listed on them need to be loaded onto each vehicle.

This section discusses considerations in relation to this critical stage of the process.

Points to note

'Stowing' is another word/term for loading – both words/terms refer to the physical loading of equipment and supplies into or onto each vehicle or method of transport to be used for trips/tours.

Important considerations when stowing equipment and supplies include:

- Prepared loading sheets must form the basis for actual loading – the planning and calculations which went into their development/creation must give the central direction for:
  - Which vehicle items are loaded onto
  - Where in each vehicle the items are located.

  Any changes made must be reflected on the loading sheet – that is, the loading sheet MUST be amended to show *actual* loading.
- Complying with approved manual handling techniques – in terms of:
  - Safe lifting and carrying
  - Use of team lifts and/or mechanical devices to help move/carry items
- Complying with weight restrictions – in terms of:
  - Weight limits for animals as advised by Codes of Practice or reference authorities
  - Legislated and/or manufacturer specifications for vehicles
- Taking into account tour-specific requirements – these commonly refer to:
  - The terrain to be covered – which can impact/influence:
    - The capacity of the vehicle (or animal) to handle the load
    - The potential for items to shift during transit
  - The itinerary – which will indicate:
    - When certain items will need to be accessed
    - The sequence in which some items will need to be accessed
  - Special needs and/or special requests which apply to the tour group
  - Items available from other providers (attractions, venues, destinations) during the trip/tour

- Enabling ready access to certain equipment and items – for example:
  - Items that will be required first are often loaded last
  - Items needed for emergencies are always stowed in a discreet and dedicated area enabling easy access in the event of an emergency
- Following legislated and/or host enterprise procedures for the stowing of hazardous items – this requirement will apply to items such as:
  - Sharp tools or equipment
  - Heavy items
  - Items made of or containing glass
  - Gas containers
  - Heat-sensitive aerosols
  - Medication
  - Petrol, fuel and other flammable materials

- Securing equipment and supplies – in order to:
  - Prevent movement, as far as practicable
  - Stop unauthorised access including theft by others and unauthorised use by tour group members.

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

Introduction

Documentation is always used to confirm all equipment and supplies have been loaded for trips and tours.

This section describes their use.

Using the checklist

Commonly, the Loading sheets are the checklists used to confirm all equipment and supplies have been loaded for trips and tours.

The checking process comprises the following:

- Meeting with tour staff to conduct the check – points to note are:
  - This meeting/activity has to be organised – it is important and needs to be scheduled and not just left to chance, or overlooked
  - Sufficient time must be allocated – it is a time-consuming process
  - Not all tour staff need to be present at this meeting but there must be at least one tour staff member in attendance to see where things are, to be informed of necessary information and to make input to any operational decisions and choices which need to be made. It is not sufficient to conduct this check with another staff member who is not going to be on the trip/tour
- Photocopying the loading sheets which were completed as part of the loading process – so the tour staff member has their own copy
- Handling any last-minute requirements – and ensuring these are authorised and documented as appropriate
- Verifying/inspecting items as necessary/appropriate to the nature of each item – for example:
  - Gas cylinders are within their legislated testing dates required for pressure vessels
  - EPIRBs are registered correctly and are still in date
  - Vehicle registration is current
  - Foods are within required Use By dates
  - There is no obvious/unacceptable damage or defects to goods
- Adjusting the loading sheets – as/if required in accordance with actual loading and/or decisions made.

  This involves:
  - Amending/entering figures in the Number Loaded column
  - Adding written comment in the Comments column

- Signing-off and dating the loading sheets – the loading sheet needs to be signed:
  - By the person/s who loaded the vehicle
  - By the tour staff member who participated in the checking process – their signature indicates:
    - All items were provided as indicated in good condition
    - They are taking responsibility for the items listed.

Note

In some cases loading and stowing of the equipment and supplies takes place **at the same time** as the checks are made to ensure all items have been packed.

In these cases:

- Tour staff help load and stow the items
- Tour staff decide where they want supplies and equipment to be located
- Loading sheets are signed-off when the process of packing/loading has been completed.

3.4 Conduct final check of all vehicles, equipment and supplies

Introduction

It is standard industry practice for there to be a final check of all vehicles, equipment and supplies after items have been loaded.

This section presents activities involved as part of this final pre-departure check.

Timing of the final check

The final check usually precedes trip/tour departure by 'some time'.

Exactly what is 'some time' varies between trips.

Trips/tours which are longer duration, custom or private and involving greater numbers, more complexity and higher vehicle numbers are traditionally conducted 'earlier' – such as a day or more in advance.

Final checks for these trips/tours take place at this time to give a realistic time frame to make any adjustments (re-packing/re-loading) or repairs which may be needed.

Regular, shorter trips/tours tend to have final checks undertaken 'on the day' or within 24 hours of departure.

A shorter lead time for these checks is used because:

- The vehicles usually need to be kept in service/available for use
- Issues arising are usually less problematic and more readily addressed
- There is less equipment to be checked – or re-loaded to another vehicle if necessary.

Final checking procedures

Practices used to complete final checking can include:

- Providing all tour staff with their own copy of the loading sheets – for their personal reference
- Familiarising tour staff with location of equipment and supplies within individual vehicles – by:
  - Conducting a 'walk-around' of the vehicle
  - Opening compartments and physically showing/indicating where individual items have been stowed (with reference to their location on the loading sheets)
- Notifying staff in relation to special precautions that have been taken – which may include:
  - Advising of storage of traditional items which have been stowed in other than usual locations
  - Explaining use of (and reasons) special packaging and storing materials and/or techniques which may have been applied

  - Demonstrating packaging and storing techniques so staff can duplicate them *en route*
- Taking vehicle for a shake-down run – this is often done to:
  - Settle items in position – so:
    - They do not rattle when customers first board
    - They can be further secured prior to tour departure
  - Verify:
    - Impact of load (in terms of weight and balance) on behaviour, handling and performance
    - Overall vehicle operational status
  - Trigger indications there are problems – with load or vehicle: see immediately below

- Visually inspecting the load and the vehicles for problem signs – such as:
  - Leakages from supplies as a result of the shake-down run, or due to faulty containers or packaging
  - Leakages from the vehicle – such as water, fuel, other fluids
  - Protrusions outside the acceptable dimensions of the vehicle
- Double-checking Loading sheets have been completed as required – and all required equipment and supplies have been loaded
- Ensuring comfort and safety for those who may be travelling in vehicles that have been packed with equipment and supplies.

Note

In some cases, the final check:

- May include a representative of a private tour party – where this has been requested or negotiated
- May feature loading of certain foodstuffs – such as:
  - Pre-prepared hot food and/or beverages (including hot water for tea and coffees) – which is to be maintained ‘hot’ so it can be served hot
  - Refrigerated and frozen foods – which have been held in commercial fridges and freezers and will be loaded into portable refrigeration and/or freezer units.

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 from the previous Work Project.

3.1 In relation to the trip/tour identified in the previous Work Project provide visual evidence you have undertaken the following **OR** describe action you would/could take to enable the following to occur:

- Prepare a loading sheets(s) for the trip/tour
- Stow provisions in tour vehicle/s
- Verified supplies against a loading sheet
- Conducted a final check of loading, provisions and vehicle/s.

Summary

Load identified tour requirements

When loading identified tour requirements:

- Talk to other employees to learn from them
- Follow organisational SOPs
- Prepare and use loading sheets – one per vehicle
- Adhere to vehicle limitations
- Observe relevant safety and security requirements
- Record locations in which items have been stowed
- Be prepared to re-pack/re-load if required
- Factor in requirements of the itinerary
- Involve input from tour staff
- Conduct vehicle shake-downs
- Verify safety and compliance of vehicle
- Inspect vehicle after testing and/or loading

Element 4:
Complete documentation

4.1 Finalise checklists and supply sheets

Introduction

Finalisation of checklists and supply sheets is the most important step in terms of internal administration.

This section details the activities which may need to be handled in order to complete these documents.

Identifying the documentation

Hard copies

The checklists/supply lists and other documents which may need finalising include:

- Loading sheets – these are the primary documents
- Requisition sheets
- Internal stock transfer sheets
- Passenger sheets/manifests
- Supply lists
- Inspection checklists
- Internal advice sheets
- Catering advice sheets
- One-off notifications from management:
  - Authorising extra allocation of physical resources
  - Allowing more funding to be granted
  - Noting agreed changes to SOPs.

Soft copies

There can also be a need to:

- Update databases
- Complete relevant/required fields
- Perform nominated data entry procedures.

Finalising the internal documents

Context

It is important to understand every operator will have their own unique protocols for completing internal paperwork and checklists.

This means:

- In some cases for certain businesses (or trips/tours) some of the steps identified below will have been undertaken as part of other activities – as already described in earlier notes
- In other cases for other businesses (or trips/tours) some of the steps listed below will take place as a separate activity after all other tasks have been finished – often because:
  - There was insufficient time available to do so at the time
  - There was insufficient information to make the correct decision about how completion of the document should occur.

Activities commonly required

Tasks which may need to be undertaken can include:

- Obtaining signatures from tour guides and tour leaders – to acknowledge receipt of the equipment and supplies
- Photocopying loading sheets – so one copy per staff member can be distributed at the pre-tour briefing to tour guides, leaders, drivers
- Dating and adding specific tour group information to the sheets – as specific to each trip/tour
- Adding missing facts and figures – not previously provided/identified
- Entering cost prices of items – from a nominated source, catalogue, internal database or invoice
- Performing basic arithmetic calculations – such as:
  - Extensions – by multiplying numbers provided by cost prices
  - Totalling various items/columns
- Forwarding completed documents – for further internal processing
- Filing – for future reference.

4.2 Provide tour-related documents to guides and tour leaders

Introduction

Depending on the type and duration of the trip/tour there can be an extensive suite of tour-related documents which need to be provided to tour staff.

This section identifies many of these documents and explains when and how they are provided.

Examples of documents

Documents which may need to be provided will need to reflect the needs and nature of the individual trip/tour and may involve:

- Loading sheets – see previous notes
- Manufacturer's instructions – as appropriate for equipment loaded
- Repair manuals – for vehicles and equipment
- Warranties and guarantees – relating to new items purchased and provided for the tour so staff can use/rely on these if there is breakdown/problem
- Copies of standard operating procedures – for reference purposes to guide on-tour actions and responses to certain situations by staff
- Standard (and/or modified as required for the individual trip/tour) response plans – for reference as/if needed:
  - Contingency plans
  - Emergency Management Plans
- Itineraries – including:
  - Tour itinerary as provided to tour group – so staff are fully aware of what participants have been told about the trip/tour and know what they expect
  - Operational itinerary – as described previously
- Maps – for the regions, areas and countries to be visited
- Passenger lists – detailing names and details of tour group party: this is not applicable to all tours
- Rooming lists – where overnight accommodation has been arranged/booked
- Passenger profiles – to give tour staff a better context for the trip/tour and indicate what they might expect from participants
- Details of special requests – in term of:
  - Contracted requests – which **must** be met
  - Refused requests – which were asked for but customers have been told these requests **cannot** be met
  - Communicating any known information about special requests which have been raised by members of the tour group

- Handout material – this can include:
  - Leaflets/information for distribution at nominated locations, sites and interpretive activities
  - General safety information
  - Tour information kits
  - Tour maps
  - Merchandise

- Tour brief – which may comprise sub-sets of a variety of information as appropriate to the nature and destinations for the trip/tour such as:
  - Safety updates
  - Terrorist alerts
  - Weather conditions
  - Road conditions
  - Updates/alerts received from carriers and/or third party providers
  - Advice about known and/or possible impediments to the planned or standard conduct/operation of the trip/tour
- Catering information – which can include:
  - Meal schedules
  - Standard recipes
  - Food safety protocols.

Provision of documentation

Practices for distributing documentation will vary between operators depending on nature of the trip/tour.

Practical implementation can involve:

- Posting of relevant details on staff notice board
- Electronic communication of relevant details to tour staff – in terms of using:
  - Emails
  - Text messages
- Face-to-face meetings – known as ‘pre-departure briefings’ these:
  - Can vary significantly in length from a couple of minutes for short trips/tours to *several hours* for longer direction events
  - May incorporate other activities – such as last-minute training, vehicle inspection and familiarisation, checking and verification of the loading sheets
  - Always include a Q&A session where tour staff are encouraged to raise any issues of concern to them regarding the upcoming trip/tour

- Incorporate hand-over of (and where necessary, signing for) items – such as:
  - Vehicle keys
  - Money and non-cash payment documentation
  - Merchandise
  - Cell phones
  - Portable radios

- Distribution of hard copy materials – and there may also be reference to where/how these can also be sourced electronically if needed while on tour.

4.3 Forward documentation to external suppliers

Introduction

Where a decision has been made to use third party suppliers or external providers for various trip/tour-related products or services, supporting documentation has to be provided to them.

This section discusses standard procedures in this regard and should be read in conjunction with section 1.3.

Important perspective

In relation to this aspect of the job it is important to understand:

- There is a non-negotiable need to honour any previously agreed arrangements – which may have been organised as part of the initial contact and subsequent negotiation process
- There is often a need to make *'immediate'* contact to make arrangements and place orders verbally – prior to the forwarding of supporting documentation (which may take an unacceptable amount of time to organise).

Activities involved

In order to ensure the required products and services are made available by external suppliers, authorities and/or communities there can be a need to:

- Confirm contractual and arrangements and similar agreements which have been agreed to – which may require forwarding of a copy of these to the suppliers
- Ensure correct Purchase Orders are raised – and appropriately signed to authorise purchases
- Ensure properly prepared Purchased Orders are sent to the appropriate suppliers – they may be forwarded:
  - In hard copy form
  - Electronically – via email using an 'Attachment' for the PO
- Complete an online PO as provided on the website of the provider:
  - Using pre-approved Passwords/User Codes if/as necessary to buy on credit
  - Paying online at the time of purchase using a debit/credit card
  - Confirming payment will be made when goods/services are received by the trip/tour group
- Provide additional information relevant to the actual purchase – as/if required, for example:
  - Sending final details and confirmation regarding numbers and names of tour group members
  - Providing room share arrangements to accommodation venues
  - Advising catering suppliers of special food/diet needs based on health, religion or custom/culture needs or lifestyle preferences

- Ensure required authorisations and permits have been finalised – which will often require:
  - Lodgement of a formal application on an official form
  - Provision of nominated details/information
  - Payment of a fee
- Submit touring plans – where required to authorities and/or local communities in order to:
  - Advise them of upcoming movement/events
  - Seek permission/s
  - Show respect
  - Meet agreed Codes of Practice/Conduct.

4.4 Finalise documentation for tour members

Introduction

Most trips/tours involve preparation of items which need to be distributed to tour group members.

This section identifies items which may need to be organised and explains practical distribution options for them when they have been finalised.

Items to be organised

Depending on the trip/tour there can be a need to finalise:

- Permits – for:
  - Vehicle access
  - Entry to certain areas
  - Using nominated items
  - Legislated compliance purposes
- Vouchers (also known as 'coupons') – for distribution to tour group members and tour staff so they can:
  - Receive priority treatment – such as avoiding standard queues/waiting at attractions and destinations
  - Exchange them for nominated good and services
  - Swap them for 'Goods to the value of X'.
  - There is a need to check/verify:
  - All required activities are covered
  - Sufficient numbers are provided to cater for identified/expected numbers
  - Reference numbers of coupons are recorded against each trip/tour for costing and reconciliation purposes
- Name tags – these may be hand-written of pre-printed.

  Attention needs to be paid to:
  - Ensuring all known tour members have a tag
  - All types/version of tags are provided – some trips/tours issue more than one name tag such as:
    - For wearing on clothes/the person
    - For attachment to luggage – known as 'baggage tags' (or 'bag tags')
  - Correct spelling
  - Inclusion of required/appropriate honorific – such as but not limited to:
    - Mr, Mrs, Ms or Miss
    - Dr

  - Professor
  - Father (for priests)

- Standard tour-related Informational material – which can include:
  - Passenger itinerary
  - Terms and conditions of tour
  - Advice regarding the destinations, dangers and details of the tour
  - Expectations in regard to behaviour while on tour
  - Copies of relevant Codes of Conduct
  - Advice regarding the authority of the tour guide and the tour leaders while on tour
- Organisational merchandise and other tour/trip-related items – which can include:
  - Hats/caps
  - Travel bags
  - Discount coupons for future tours
  - Feedback forms/Customer Comment cards
  - Special items where ‘Children’ are known to be touring – such as colouring books and pencils, reading materials, range of toys
  - Special items where ‘Infants’ are known to be touring – such as bibs and booties or other items (some of which may have been received FOC from third party suppliers of infant formula or clothes).

Distribution of completed items

Several variations are possible in relation to the distribution of documents and items when they have been finalised.

Requirements can vary not only between individual operators but also within organisations depending on tour types.

Actions required can include:

- Loading of items onto the tour vehicle/s
- Placing completed ‘packs’ (usually one per tour group member) in a designated location – for tour staff to collect when needed
- Handing items over in-person to designated tour staff
- Distributing the items to tour members – on arrival/as they board
- Forwarding items to tour members (by mail, electronically, courier or by hand) prior to departure date.

4.5 Update internal inventory and stock control records

Introduction

This section explains why there is a need to update these records, identifies records which may need to be updated and describes general requirements to achieve what is required.

Need to update records

Internal records of the organisation must be updated in order to:

- Manage the size of the inventory – so:
  - Value of stock does not exceed required monetary value prescribed by management
  - Physical size/dimensions of stock do not exceed capacity for storing same
- Ensure the organisation does not run out of stock – and required items are available when necessary
- Facilitate stock management and control – which forms the basis of financial control and the calculation of statistics relating to financial performance of each trip/tour.

  This is essential to ensure the ongoing viability of the business and indicate, for example:
  - Unprofitable trips/tours which need to be removed
  - Need for the price of tickets to rise
  - Areas of the trip/tour which need attention
- Help ensure stock is rotated correctly – generally applying the FIFO approach to stock usage.

Records involved

Records which may need to be updated can include:

- Electronic databases, files and folders
- Hard copy forms and documents.

The records which may need to be updated (or forwarded to administration/management) can include:

- Requisitions – used to order stock from internal stores for each trip/tour
- Stock take sheets – used to record stock counts
- Bin cards – used to control individual stock items at their unique locations in the store room
- Purchase orders – used to authorise purchases from external suppliers
- Receipts – required to demonstrate money has been paid, and/or has been spent on the items listed

- Supplier-related documentation – such as:
  - Delivery dockets and Invoices – documents which accompany deliveries into the organisation from third party providers
  - Statements – which are (generally) monthly documents from individual suppliers providing an overview of transaction with them for the period and listing the amount they are owed
  - Credit notes – detailing money owed to the organisation by suppliers as a result of things such as returning goods, refunds for various reasons, or identified over-charges
- Damaged goods sheets – identifying:
  - Goods which have been removed from inventory by type and quantity
  - What has happened to these items – such as:
    - Returned to supplier for credit
    - Taken out of service for repair
    - Disposed of
  - If any money was received (or expense incurred) as a result of action taken
- Returned goods – detailing:
  - What was returned and to whom
  - Value of goods in terms of expected credit
  - Date and other relevant details.

General duties

It may be necessary to undertake the following in order to meet internal requirements for stock management:

- Conduct stock takes – to:
  - Count stock-on-hand
  - Determine value of stock on hand
  - Identify stock use and/or shortages
- Add final/missing details – to documents/information fields. This may relate to:
  - Dates
  - Names
  - Prices
  - Final/actual figures
- Perform nominated calculations – to assist with statistical manipulation of figures/data
- Follow-up as required – with, as appropriate:
  - Internal/tour staff
  - Suppliers
- Count stock returned – when trip/tour returns to base

- Forward nominated documents to management/administration – so:
  - They documents and data can be further processed
  - Accounts can be paid
  - Information can be incorporated into internal reports
- File documents – for future reference
- Pass on lessons learned from processing the documentation – to tour guides and leaders, management and administration.

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.

4.1 When completing documentation as part of the activities required for conducting pre-departure checks, explain how you would or demonstrate evidence you have:

- Finalise/d checklists/loading sheets
- Provide/d tour-related documents to guides and tour leaders
- Forward/ed documentation (actual or simulated) to external suppliers
- Finalise/d documentation for tour members
- Update/s internal stock management records

Summary

Complete documentation

When completing documentation:

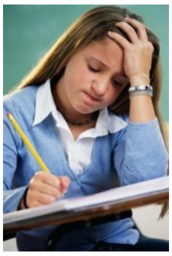
- Finalise checklists and supply sheets
- Give tour-related documents and items to tour staff
- Organise tour documents and merchandise for tour staff
- Ensure accuracy and completeness of information provided
- Count stock on hand and stock returned from trips/tours
- Follow-up stock returned to suppliers for credit
- Forward documents to administration for processing
- Forward documents to management for their information
- Provide missing information on sheets/forms as necessary
- Learn lessons for future reference
- Communicate lessons learned to others within the organisation

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:

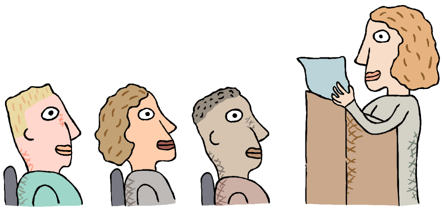
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

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

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

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

Cook, Roy A & Hsu, Cathy H. C & Marqua, Joseph J 2014, *Tourism: the business of hospitality and travel*, Fifth edition, Boston Pearson

Knudson, Douglas M & Cable, Ted T., (author.) & Beck, Larry, 1953-, (author.) 2003, *Interpretation of cultural and natural resources*, Second edition, State College, Pennsylvania Venture Publishing

Kotler, Philip & Bowen, John T & Makens, James C 2014, *Marketing for hospitality and tourism*, Sixth edition, Boston Pearson

Mancini, Marc 2001, *Conducting tours*, 3rd ed, Delmar/Thomson Learning, Albany

Mitchell, G. E 2005, *How to start a tour guiding business: a "how-to" manual for the thousands of people who want to discover the world of travel as a career*, 3rd ed, GEM Group, Charleston, S.C

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

Pond, Kathleen Lingle 1993, *The professional guide: dynamics of tour guiding*, Van Nostrand Reinhold, New York

Collins, Verite Reily 2000, *Becoming a tour guide: Principles of guiding and site interpretation*, Continuum, London

Trainee evaluation sheet

Conduct pre-departure checks

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

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

The best things about this unit were:

____

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____

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The worst things about this unit were:

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____

____

The things you should change in this unit are:

____

____

____

____

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 pre-departure checks

		Yes	No*
Element 1: Identify tour requirements			
1.1	Identify itinerary for the tour	☐	☐
1.2	Identify group numbers on the tour	☐	☐
1.3	Identify supplies that can be obtained on tour	☐	☐
1.4	Identify special needs for the tour	☐	☐
1.5	Identify budget for equipment and supplies for the tour	☐	☐
1.6	Determine final requirements for the tour	☐	☐
Element 2: Prepare identified tour requirements			
2.1	Obtain identified equipment and supplies	☐	☐
2.2	Check condition of equipment and supplies	☐	☐
2.3	Confirm quantity of equipment and supplies	☐	☐
2.4	Ensure compliance with host enterprise protocols for equipment and supplies	☐	☐
2.5	Acquire additional equipment and supplies, where needed	☐	☐
2.6	Verify identified equipment and supplies with tour staff	☐	☐
2.7	Develop checklist of all equipment and supplies for use when loading and while on tour	☐	☐
Element 3: Load identified tour requirements			
3.1	Prepare loading sheet for each vehicle or form of transport to be used	☐	☐
3.2	Stow equipment and supplies	☐	☐
3.3	Use checklist/s to ensure all equipment and supplies are loaded	☐	☐
3.4	Conduct final check of all vehicles, equipment and supplies	☐	☐

		Yes	No*
Element 4: Complete documentation			
4.1	Finalise checklists and supply sheets	☐	☐
4.2	Provide tour-related documents to guides and tour leaders	☐	☐
4.3	Forward documentation to external suppliers	☐	☐
4.4	Finalise documentation for tour members	☐	☐
4.5	Update internal inventory and stock control records	☐	☐

Statement by Trainee:

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

Signed: ________________________________ **Date:** _____________

Note:

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

William Angliss Institute
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