

Competency Standard

UNIT TITLE: CO-ORDINATE AND OPERATE A DAY-TOUR (OR SHORT EXCURSIONS)		NOMINAL HOURS: 60
UNIT NUMBER: D2.TTG.CL3.05		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to conduct a one-day tour or short excursion involving multiple products and services to multiple sites.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Prepare for the tour</p> <p>1.1 Identify the <i>type of tour</i> to be conducted</p> <p>1.2 Interpret <i>briefing information from the tour operator</i></p> <p>1.3 Describe the <i>specific issues to be considered</i> to ensure customer needs are met</p> <p>1.4 <i>Liaise with colleagues</i></p> <p>1.5 Identify <i>potential risks</i> for the tour</p> <p>1.6 <i>Identify and obtain specific resources</i> for individual tours</p> <p>1.7 Develop <i>plans for the tour</i></p> <p>1.8 <i>Stow equipment and supplies</i> for the tour</p> <p>Element 2: Conduct the tour</p> <p>2.1 <i>Brief customers</i> about tour</p> <p>2.2 <i>Commence tour</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment.</p> <p>This unit applies to a tour guide conducting a one-day tour or short excursion involving multiple products and services to multiple sites, within the labour divisions of the hotel and travel industries and may include:</p> <p>1. Tour Operation</p> <p><i>Type of tour</i> may be related to:</p> <ul style="list-style-type: none"> • Half and full day tours • City or rural tours • Cultural tours or eco-tours • Adventure tours • Special interest tours. <p><i>Briefing information</i> from the tour operator may include:</p> <ul style="list-style-type: none"> • Customer information 	

<p>2.3 <i>Follow itinerary</i> for the tour</p> <p>2.4 Provide <i>additional information and assistance</i></p> <p>2.5 <i>Engage with industry colleagues</i> during the tour</p> <p>2.6 <i>Respond to issues arising</i> while on tour</p> <p>2.7 <i>Deal with unexpected events and emergencies</i></p> <p>2.8 <i>Conclude tour</i> as planned</p> <p>Element : Complete post-tour activities</p> <p>3.1 Complete <i>tour report and documentation</i></p> <p>3.2 <i>Process cash, vouchers and other charges</i></p> <p>3.3 De-brief with other tour staff</p> <p>3.4 Pass on feedback received from customers to management</p>	<ul style="list-style-type: none"> • Itinerary information • Supplier information • Special request notes • Tickets/vouchers or other travel documentation for guide and/or group • Supplier contact details • Optional tour information • Financial documents • Promotional materials • Warnings and advisories • Permissions and authorities that have been approved/obtained. <p><i>Specific issues to be considered</i> may be related to:</p> <ul style="list-style-type: none"> • Types of customers • Customer special needs • Size of tour group • Length of tour • Specific itinerary requirements • Special requests • Style of commentary and/or activities required • Location of tour • Climate and environmental conditions • Equipment and resources required • Environmental and cultural considerations • Language considerations.
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Liaise with colleagues should relate to:

- Obtaining information and help from colleagues on the basis of their experience
- Obtaining assistance with planning activities
- Asking colleagues to check decisions that have been made for the tour
- Planning involvement of colleagues in the tour.

Potential risks may relate to:

- Customers, especially their personal health and capacity to participate in the tour
- Tour routes including terrain
- Climate/weather
- Activities to be undertaken
- Potential service delivery difficulties
- Timing constraints.

Identify and obtain specific resources should relate to listing and acquiring types and forms of physical resources required including:

- Vehicles and vessels
- Aircraft and other types of transport which may include live transport, bikes and motorbikes
- Camping and catering equipment including food, beverage and refreshments
- Safety equipment including first aid kits and communication equipment
- Recreational and activity equipment
- Maintenance equipment
- Educational equipment
- Cash

	<ul style="list-style-type: none">• Vouchers• Naming and allocating staff to the roster required to conduct the tour including identification of roles and responsibilities based on experience, qualifications, training and integration of skill sets pertaining to human resources that may include:<ul style="list-style-type: none">▪ Drivers▪ Tourist guides▪ Driver-guides▪ Hosts and hostesses▪ Campsite cooks▪ Interpreters▪ Camp and tour assistants• Quantifying physical resources, by number, amounts, values and volumes• Quantifying human resources, by number and hours. <p><i>Plans for the tour</i> may include:</p> <ul style="list-style-type: none">• Standard operating plans including their alignment with stated itinerary• Contingency plans• Emergency plans. <p><i>Stow equipment and supplies</i> refers to the physical loading of equipment and supplies into or onto each vehicle, or method of transport to be used and must include:</p> <ul style="list-style-type: none">• Complying with safe manual handling techniques• Complying with weight restrictions including vehicles and animals• Taking into account the terrain to be covered and the potential for items to shift during transit
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- Enabling ready access to equipment and items that will be required first and/or required in the event of an emergency
- Following legislated and/or host enterprise procedures for the stowing of hazardous items which may include:
 - Sharp tools or equipment
 - Heavy items
 - Items made of or containing glass
 - Gas containers
 - Heat-sensitive aerosols
 - Medication
 - Petrol, fuel and other flammable materials
- Securing equipment and supplies to prevent movement, as far as practicable.

Brief customers may include:

- Welcoming customers
- Introduction of tour guide and crew to customers including identifying their roles and responsibilities
- Presenting tour overview including description of itineraries, destination information, timing details, activities, meals/refreshments, and tour options
- Distributing items including name badges, vouchers, handouts and brochures, safety equipment and/or clothing
- Explaining tour requirements including required behaviours, applicable codes of conduct, safety and security issues, need for respect of local communities, cultures, people and the environment, level and nature of physical exertion required
- Introducing and/or back grounding the tour including historical data, relevant details, contextual information, points of interest.

Commence tour may include:

- Loading customers/passengers onto transport including checking seat allocation
- Checking customers have paid
- Directing customers to the first destination/activity
- Engaging with group participants
- Encouraging participation
- Generating confidence
- Building credibility.

Follow itinerary must include:

- Ensuring all advertised destinations, activities including interpretive activities, products and services are delivered as promoted
- Providing tour commentary
- Optimising the tour experience for all customers
- Monitoring, directing, controlling and, where necessary, modifying group and/or individual behaviour
- Demonstrating principles of tour guiding:
 - Safety and security including people and property and the development of standard and contingency plans
 - Care and respect including for the tour group, locals and the environment
 - Skills, knowledge and ability to conduct/lead the tour
 - Relevant knowledge in relation to the tour including sites, destinations, environment and activities
 - Providing an interesting and engaging experience
 - Ethical conduct
 - Catering for the needs of those with special needs and individual differences.

Additional information and assistance may relate to:

- Local events and activities
- Options for free time activities
- General directions
- Anecdotes recounting personal experiences
- Local facilities.

Engage may include:

- Responding to requests for assistance
- Asking for assistance
- Liaising in order to make decisions
- Providing support for the work of industry colleagues
- Anticipating requests and responding proactively
- Confirming forward bookings with venues, sites, destinations and providers including advising operators of expected arrival time, group numbers, special requests and timing constraints that may apply
- Making payment to suppliers, providers and carriers for services and products rendered according to previously agreed arrangements, or as required.

Industry colleagues will vary depending on the type of tour and may include:

- Host communities including community leaders, elders and other designated spokespeople
- Coach and other vehicle drivers
- Tour managers
- Local and independent guides

- Carriers
- Tour operators including office staff
- Product suppliers and venues including hotels and restaurants, attractions and sites, and retail shops
- Land owners and land managers
- Representatives of statutory authorities.

Respond to issues arising may include:

- Deciding tour alternatives, where applicable, based on group preferences
- Modifying and re-planning itinerary based on changed conditions, circumstances and/or customer requests and/or preferences
- Adjusting timing to meet deadlines and pre-arranged arrival and departure times
- Notifying customers of, and explaining, changes to initial itinerary
- Notifying venues, sites, destinations and providers of revised itinerary, as necessary.

Deal with unexpected events and emergencies may include:

- Implementing contingency and/or emergency plans
- Notifying authorities and/or emergency services to obtain assistance
- Maintaining communication with customers to notify them of action to be taken in response to the unexpected event
- Optimising the safety of customers including placing the safety of people above the protection of assets
- Assuming authority, taking charge and issuing directives to customers
- Taking action to minimise the adverse impact of the unexpected event on the conduct, and customer enjoyment of, the tour
- Apologising for the event

- Adhering to host enterprise policies and procedures with regard to not admitting liability and not promising recompense including referring customers to management, head office or to duty supervisor on arrival back at the departure point, where applicable.

Unexpected events and emergencies should be planned for, as far as practicable, so that contingency plans can be put into effect when required. The nature of unexpected events and emergencies can vary with tour types and the specifics of individual tours and groups, but may include:

- Systems failure including technical and equipment failure
- Vehicle breakdown
- Vehicle accidents
- Injury, accident or death
- Adverse weather conditions including the impact of adverse weather conditions in a near-by or associated area
- Inappropriate customer behaviour
- Unpredictable animal behaviour
- Road closures
- Closures of sites and unannounced restricted access to traditional areas.

Conclude tour may include

- Thanking tour group
- Promoting other tours available through the same operator
- Providing a tour summary, where appropriate
- Collecting returnable items that were distributed to customers
- Addressing complaints
- Seeking verbal and written feedback
- Escorting customers off/from vehicles.

Tour report and documentation may include:

- Vehicle usage books including distance travelled, locations visited, and fuel used/purchased
- Maintenance reports and requests
- Finalising details of tour that may include:
 - Departure and return times
 - Group numbers
 - Names of tour staff including hours worked
 - Destinations and sites visited
 - Details of deviations from scheduled itinerary including reasons for same
 - Details of complaints received
 - Details of action that had to be taken to address customer behavioural problems
 - Details of accidents and injuries
 - Details of any event where emergency services or authorities were contacted or involved
 - Suggestions for changes to future tours including rationale for same.

Process cash, vouchers and other charges may include:

- Reconciling money and vouchers
- Completing paperwork to support invoicing of charges to individual customers, as appropriate
- Forwarding documentation, as required, to the appropriate person/location for further processing or finalisation.

Assessment Guide

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

- Enterprise policies and procedures in regard to the co-ordination and operation of day-tours or short excursions
- Knowledge of the local tourism industry where tour occurs, and general tour industry knowledge
- Principles of guiding
- Ability to use first aid and emergency situation techniques
- Specific information regarding the tour being conducted
- Legal liability issues
- Hazard identification and risk management
- Communication, leadership, negotiation, conflict resolution and problem-solving skills.

Linkages To Other Units

- Work as a tour guide
- Conduct pre-departure checks
- Conduct interpretive activities in the field
- Develop and co-ordinate appropriate cultural tourism activity
- Establish and maintain safe touring conditions
- Lead tour groups in a responsible manner
- Manage and facilitate an extended tour experience
- Plan, develop and evaluate interpretive activities
- Plan, trial and implement minimal impact operations
- Prepare and present tour commentaries

- Provide arrival and departure assistance
- Research and share information on indigenous cultures
- Develop and update tourism industry knowledge.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures regarding the operation of day-tours and short excursions
- Demonstrated ability to undertake practical preparation activities and planning requirements necessary to prepare for the conduct of nominated tour type for a given itinerary to a designated group of customers
- Demonstrated ability to conduct a day-tour or short excursion of a nominated type for a designated group of people demonstrating the full range of roles, responsibilities and functions of a tour guide and ensuring the advertised activities and destinations are achieved
- Demonstrated ability to effectively deal with nominated unexpected events while conducting a tour ensuring that customer safety is preserved, communications with customers are maintained and adverse impacts on the tour and customer experience is minimised
- Demonstrated ability to conduct nominated post-tour activities which must include soliciting feedback from customers and colleagues; and completing designated documentation for the tour.

Context of Assessment

Assessment must ensure:

- Actual or simulated office environment for pre-tour and post-tour phases; and an actual (short) tour activity for the demonstration of practical tour guiding skills.

Resource Implications

Training and assessment must include a real or simulated itinerary, real or simulated tour group profiles/details and access to a range of actual tour-related equipment, supplies and vehicles; and access to workplace standards, procedures, policies, guidelines, tools and equipment. Note that a representative, but not exhaustive range of equipment and supplies must be available to support demonstration of competency; but emergency and/or unexpected delays may be simulated.

Assessment Methods

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

- Observation of practical candidate performance
- Portfolio of documentation that may support planning and post-tour tour guiding activities
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

	Key Competencies in this Unit		
	<i>Level 1 = competence to undertake tasks effectively</i>		
	<i>Level 2 = competence to manage tasks</i>		
	<i>Level 3 = competence to use concepts for evaluating</i>		
	Key Competencies	Level	Examples
	Collecting, organising and analysing information	2	Prepare contingency and emergency plans for the tour
	Communicating ideas and information	3	Explain tour-related details to customers prior to and during the tour
	Planning and organising activities	3	Re-plan the itinerary during a tour due to unexpected delays/exigencies
	Working with others and in teams	3	Liaise with tour crew prior to, during and post tour
	Using mathematical ideas and techniques	1	Calculate times, distances, numbers and tour-related statistics
	Solving problems	3	Resolve interpersonal disputes between customers while on tour
	Using technology	1	Use tour equipment including items for travel, activities, safety and communication