

Competency Standard

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| UNIT TITLE: MANAGE AND FACILITATE AN EXTENDED TOUR EXPERIENCE | | NOMINAL HOURS: 80 |
| UNIT NUMBER: D2.TTG.CL3.13 | | |
| UNIT DESCRIPTOR: This unit deals with skills and knowledge required to prepare for, co-ordinate the requirements of, and conduct an extended tour | | |
| ELEMENTS AND PERFORMANCE CRITERIA | UNIT VARIABLE AND ASSESSMENT GUIDE | |
| <p>Element 1: Prepare for an extended tour</p> <p>1.1 <i>Identify itinerary for the tour</i></p> <p>1.2 <i>Identify group numbers on the tour</i></p> <p>1.3 <i>Identify supplies that can be obtained on tour</i></p> <p>1.4 <i>Identify special needs for the tour</i></p> <p>1.5 <i>Identify budget for equipment and supplies for the tour</i></p> <p>1.6 <i>Determine final requirements for the tour</i></p> <p>1.7 <i>Confirm operational arrangements for the tour</i></p> <p>Element 2: Commence the tour</p> <p>2.1 <i>Undertake pre-departure checks</i></p> <p>2.2 <i>Stow identified equipment and supplies</i></p> <p>2.3 <i>Complete and pack tour-related documents and documentation for tour members</i></p> <p>2.4 <i>Brief tour customers</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 staff who prepare for, coordinate the requirements of and conduct an extended tour, within the labour divisions of the hotel and travel industries and may include:</p> <p>1. Tour Operation</p> <p><i>An extended tour</i> is a tour that exceeds one day duration and contains an extended touring program that may include:</p> <ul style="list-style-type: none"> • General sightseeing tours • Eco-tours • Adventure and recreational tours • Cultural, educational and historic tours • Cruise programs • Four-wheel drive tours. | |

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| <p>Element 3: Manage the tour</p> <p>3.1 <i>Conduct the tour</i> in accordance with the itinerary</p> <p>3.2 <i>Adjust touring arrangements</i> in response to issues arising on the tour</p> <p>3.3 <i>Implement arrangements regarding catering, accommodation and transport</i> in accordance with advertised criteria</p> <p>3.4 Liaise and negotiate with third party providers to maximise operational efficiency and service levels to tour group members</p> <p>3.5 Cope with the long hours and <i>variety of tasks</i> associated with extended tours</p> <p>Element 4: Optimise tour member experiences on the tour</p> <p>4.1 <i>Demonstrate principles of tour guiding</i></p> <p>4.2 Introduce tour group members to each other, where appropriate</p> <p>4.3 Explain the objectives and opportunities provided by participating in the tour</p> <p>4.4 Use <i>techniques to build and maintain group cohesion</i> on tour</p> <p>4.5 Share and explain <i>general rules</i> that apply to group members while on tour</p> <p>4.6 <i>Balance the needs of the group with individual needs</i></p> <p>3.6 Resolve <i>person-to-person conflict</i></p> | <p><i>Identify itinerary for the tour</i> may include:</p> <ul style="list-style-type: none"> • Specifying locations to be visited, including sites, areas/regions, towns and venues/attractions • Establishing nature and purpose of the tour • Identifying duration, including departure and arrival dates, days and nights away and specific timing considerations • Listing potential support services and suppliers involved, including those who will share in providing equipment and supplies for the tour and/or nominated aspects of it. <p><i>Identifying group numbers</i> may include:</p> <ul style="list-style-type: none"> • Listing the number of tour members/participants, including identification of those who will depart and/or join the tour along the way • Differentiating between and quantifying individual classifications of tour members, including men and women; infants, children and adults; different age groups • Assessing potential usage of participants for each activity, at each location and for every service and/or product advertised. <p><i>Supplies that can be obtained on tour</i> may be related to:</p> <ul style="list-style-type: none"> • Undertaking a cost-benefit analysis regarding the decision to take supplies or buy them <i>en route</i> • Verifying availability of supplies identified for purchase <i>en route</i> • Ensuring cash, credit or pre-paid arrangements have been made with identified suppliers • Verifying availability of suppliers <i>en route</i> in cases of an emergency. <p><i>Identifying special needs</i> may include:</p> <ul style="list-style-type: none"> • Factoring in variations to standard equipment and supplies traditionally packed for similar tours • Purchasing additional or new equipment and supplies |
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| <p>Element 5: Resolve service-related problems that arise on tour</p> <p><i>5.1 Monitor operational issues and service provision</i></p> <p>5.2 Identify sub-standard operational and customer service issues</p> <p><i>5.3 Respond to sub-standard operational and customer service issues</i></p> <p><i>5.4 Analyse service-related problems</i></p> <p>Element 6: Deal with safety issues</p> <p>6.1 Deal with <i>unexpected events</i></p> <p>6.2 Deal with <i>emergencies</i></p> <p>6.3 Provide <i>basic first aid procedures</i></p> | <ul style="list-style-type: none"> • Accommodating the needs of special needs customers, including people with disabilities, elderly, children and infants • Meeting promises in regard to service delivery on tour. <p><i>Identify budget</i> could relate to:</p> <ul style="list-style-type: none"> • Ensuring equipment and supplies remain within given budget parameters for the tour • Clarifying the situation regarding special purchases that need to be made, including passing on costs to tour members, claiming back all legitimate expenditure from the tour group and understanding the terms and conditions of the tour. <p><i>Equipment and supplies</i> may include:</p> <ul style="list-style-type: none"> • Camping and catering equipment • Maintenance, recreational, educational and communication equipment • Materials to support interpretive activities • Fuel • Water • Food and beverages • Luggage • Medical and first aid items • Commercial cargo, where applicable • Cash, vouchers and various authorities to act and/or make purchases on behalf of the host enterprise. <p><i>Determine final requirements</i> will include:</p> <ul style="list-style-type: none"> • Combining information known about the tour, including itinerary, type of tour, duration, activities, type of participants, numbers to calculate equipment and supplies by name and quantity |
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| | <ul style="list-style-type: none">• Confirming estimate with tour personnel• Double-checking calculations and determinations• Comparing identified requirements with documentation from previous similar tours, where applicable• Including a safety factor margin, by quantity/amount, for nominated important items of equipment and supplies. <p><i>Operational arrangements</i> may include:</p> <ul style="list-style-type: none">• Luggage coordination, including pick-up, movement, transfers and loading• Documentation preparation, including travel documents and tour related forms, permissions and authorities• Currency requirements, including traveller's cheques, cash, foreign currency and access to credit for emergency situations• Seat rotation arrangements for customers• Tour responsibilities for staff• Check-in and check-out procedures for accommodation and other venues, sites and locations, including the procedure for counting tour group numbers to verify 'all present'• Immigration and customs procedures, including preparation and distribution of such information to customers prior to initial departure and when crossing borders• Local touring liaison, including the establishment of contacts with relevant local authorities, private bodies, service groups and support agencies/services• Payment of fees, charges, levies, taxes and other expenses, as required• Confirmation in writing of identified requirements, where appropriate, including transport, accommodation, attractions, tours and activities. |
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Undertake pre-departure checks may include:

- Checking and confirming quantity and condition of identified equipment and supplies
- Confirming equipment and supplies with tour staff.

Stow equipment and supplies refers to the physical loading of equipment and supplies into or onto each vehicle or method of transport to be used and must include:

- Complying with safe manual handling techniques
- Complying with weight restrictions, including vehicles and animals
- Taking into account the terrain to be covered and the potential for items to shift during transit
- Enabling ready access to equipment and items that will be required first and/or required in the event of an emergency
- Following legislated and/or host enterprise procedures for the stowing of hazardous items which may include:
 - Sharp tools or equipment
 - Heavy items
 - Items made of or containing glass
 - Gas containers
 - Heat-sensitive aerosols
 - Medication
 - Petrol, fuel and other flammable materials
 - Securing equipment and supplies to prevent movement, as far as practicable.

Tour-related documents will vary depending on the type of tour and may include:

- Loading sheets
- Manufacturer's instructions for equipment

- Repair manuals
- Warranties and guarantees relating to new items purchased for the tour
- Copies of standard operating procedures and contingency plans
- Itineraries, including tour itinerary and operational itinerary
- Maps
- Passenger lists
- Rooming lists
- Passenger profiles
- Details of special requests
- Handout material for distribution at nominated locations, sites and interpretive activities
- Tour brief
- Catering information, including meal schedules and recipes
- Checklists
- Insurance documentation
- Voluntary assumption of risk forms, where applicable
- Supply sheets.

Documentation for tour members may include:

- Permits
- Vouchers
- Name tags
- Informational material
- Itinerary

- Terms and conditions of tour
- Advice regarding the destinations, dangers and details of the tour
- Expectations in regard to behaviour while on tour
- Advice regarding the authority of the tour guide and the tour leaders while on tour.

Brief tour customers should relate to:

- Providing hard copy safety information
- Advising customers of the need to be responsible for their own actions
- Identifying and explaining the matters that have been identified as presenting a safety risk
- Urging customers to be cautious
- Urging customers to monitor the activities of other customers
- Explaining the emergency plans that exist
- Notifying customers of the role of staff when an emergency or incident arises.

Conduct the tour may 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
- Staying within budget.

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| | <p><i>Adjust touring arrangements</i> may include:</p> <ul style="list-style-type: none"> • Deciding tour alternatives, where applicable, based on group preferences and needs arising, including deciding alternative routes, re-booking of single or multiple services, organisation of new documentation and cost re-negotiation • Ensuring adjustments to the itinerary/touring arrangements maintain the context of the tour • 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 • Staying within budget. <p><i>Implement arrangements regarding catering, accommodation and transport</i> may include:</p> <ul style="list-style-type: none"> • Coordinating campsite requirements, including sleeping arrangements, food and hygiene needs • Facilitating personal and luggage transfers to venues • Making bookings and payments, including moving tour group members through check-in/registration, where applicable • Assisting with practical tasks to support the primary efforts of other staff, as required. <p><i>Variety of tasks</i> may include:</p> <ul style="list-style-type: none"> • Interacting with other staff, including drivers, tour managers, guides, cooks, interpreters and employees from third party providers • Completing administrative work, including record-keeping, bookkeeping, money handling, arranging changes with providers and suppliers |
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- Involvement with tour group members in a way not found on shorter tours, including the need to socialise with tour group members during designated free time whilst on the tour
- All aspects of the tour, including arrivals and departures, meals, accommodation, transfers, sightseeing, meeting special needs, providing first aid and various responses to a range of individual tour group member needs.

Demonstrate principles of tour guiding must include:

- Safety and security, including people and property and the development of standard and contingency plans which must place the safety of persons above the safety of property
- 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.

Techniques to build and maintain group cohesion may include:

- Encouraging interaction between group members
- Initiating group activities or games
- Inviting individuals to address the group
- Utilising the skills of individual tour group members within the tour
- Focusing the group on shared experiences
- Using seat rotations systems

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| | <ul style="list-style-type: none">• Creating opportunities for individual interaction• Accommodating individual preferences, where possible• Keeping group informed about the itinerary and planned changes• Facilitating attempts at group cohesion• Creating and supporting attempts to optimise goodwill and group morale. <p><i>General rules may include:</i></p> <ul style="list-style-type: none">• Acceptable and unacceptable behaviour in relation to other tour group members, local/host communities and in relation to scheduled activities and sites• Respect for others and the environment• Need for sharing• Need to observe time constraints• Basic requirements to ensure safety and security of tour group members and their possessions• Action to take in the event of an accident or emergency. <p><i>Balance the needs of the group with individual needs may include:</i></p> <ul style="list-style-type: none">• Introducing supplementary activities to cater for an identified need• Ensuring inclusiveness to the greatest extent possible• Explaining unique individual needs to the group and asking their permission for special treatment of the special needs person. <p><i>Person-to-person conflict may include:</i></p> <ul style="list-style-type: none">• Conflict between tour group members, including intra-family conflict• Conflict between tour group members and non-tour group members, including members of the public and staff related to third-party carriers or providers |
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| | <ul style="list-style-type: none"> • Conflict between tour group members and host enterprise tour staff/guides • Conflict involving authorities • Conflict involving local communities • Dominant, domineering and/or disruptive group members, including those affected by alcohol and/or drugs • Sub-groups/cliques within the wider tour group • Perceptions of favouritism by tour leader to certain tour group members. <p><i>Monitor operational issues and service provision may include:</i></p> <ul style="list-style-type: none"> • Observing activities and service provided • Speaking with tour group members to obtain their immediate feedback • Liaising with tour staff. <p><i>Respond to sub-standard operational and customer service issues may include:</i></p> <ul style="list-style-type: none"> • Taking responsibility for finding a solution • Negotiating with third party suppliers and providers to rectify situations • Initiating immediate action to address individual issues • Negotiating possible solutions with those affected • Apologising • Acting to minimise the negative impact of the sub-standard service provision. <p><i>Analyse service related problems may include:</i></p> <ul style="list-style-type: none"> • Determining the cause of the problem • Assessing the impact of the problem, including the long-term impact on business and the effect on the image of the agency • Identifying ways and taking on tour action to prevent the recurrence of sub-standard service provision • Communicating with head office for advice and to convey details of problems. |
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Unexpected events should be planned for as far as practicable so that contingency plans can be put into effect when required. The nature of unexpected events will depend on the tour types and the specifics of individual routes and activities but may include:

- Systems failure, including technical and equipment failure
- Injury, accident or death
- Adverse weather conditions, including the impact of adverse weather conditions in a near-by or associated area
- Failure of tour group member to be at designated meeting point on time
- Inappropriate customer behaviour
- Unpredictable animal behaviour
- Closures of sites and unannounced restricted access to traditional areas.

Deal with 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 emergency
- 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 emergency on the conduct and customer enjoyment of the tour
- Apologising for the event
- Adhering to host enterprise policies and procedures in 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.

Basic first aid procedures may include treatment for:

- Heat exhaustion and heat stroke
- Hypothermia
- Simple fractures
- Burns and scalds
- Cuts and abrasions
- Bites and stings
- Heart attack.

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 extended tours
- 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
- Knowledge of specific information regarding the tour being conducted
- Knowledge of legal liability issues
- Hazard identification and risk management
- Co-ordination, 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
- Establish and maintain safe touring conditions
- Lead tour groups in a responsible manner
- Plan, develop and evaluate interpretive activities
- Plan, trial and implement minimal impact operations
- Prepare and present tour commentaries
- Provide arrival and departure assistance
- Develop and update tourism industry knowledge
- Provide basic first aid procedures
- Manage operational risk
- Maintain tourism vehicles in safe and clean operational condition
- Operate and maintain a 4-WD vehicle in safe working condition
- Operate tours in remote areas
- Co-ordinate and operate a day tour or short excursion.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures regarding the operation of extended tours
- Demonstrated ability to identify the equipment and supplies, by type/name and quantity, required to support the conduct of a nominated extended tour for a given itinerary in accordance with supplied details of the tour group including numbers, composition and special requests

- Demonstrated ability to identify the pre-departure checks that should be made to every item of equipment and all supplies listed as being necessary to support the safe and effective conduct of a nominated extended tour
- Demonstrated ability to pack, load and effectively secure a nominated range and quantity of tour-related equipment and supplies onto/into designated vehicles/means of transport in preparation for a nominated actual extended tour departure
- Manage a nominated actual extended tour, such that the tour operates in accordance with the designated/advertised itinerary to the best extent possible, making necessary adjustments as required to accommodate needs arising and real or simulated special needs and all necessary/nominated tour-related roles and responsibilities are discharged to optimise the experiences of tour group members
- Demonstrated ability to effectively, promptly and successfully resolve a nominated, simulated set of service and/or provider-related problems on a designated actual extended tour and to identify action(s) that may be taken to prevent a recurrence of that problem
- Demonstrated ability to effectively deal with nominated, simulated unexpected events and emergencies while conducting an actual extended tour, ensuring that customer safety is preserved, communication with customers is maintained and adverse impacts on the tour and customer experience is minimised.

Context of Assessment

Assessment must ensure:

- Actual or simulated office environment for the planning phase and an actual extended tour activity for the demonstration of practical management and facilitation skills.

Resource Implications

Training and assessment must include a real or simulated itinerary, real or simulated tour group profiles/details, an actual extended tour activity and access to a range of actual tour-related equipment, supplies and vehicles. Note: 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 on tour activities
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work
- Simulations.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

| Key Competencies | Level | Examples |
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| Collecting, organising and analysing information | 2 | Preparing contingency and emergency plans for the tour |
| Communicating ideas and information | 3 | Explaining tour-related details to customers prior to and during the tour |
| Planning and organising activities | 3 | Re-planning the itinerary during a tour due to unexpected delays |
| Working with others and in teams | 3 | Liaising with tour crew prior to, during and post- tour |

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| | Using mathematical ideas and techniques | 1 | Calculating times, distances, numbers and tour-related statistics |
| | Solving problems | 3 | Resolving interpersonal disputes between customers while on tour |
| | Using technology | 1 | Using tour equipment including items for travel, activities, safety and communication |