

Learning Assessment Guide

Unit Standard 21864 – Version 1

Manage travel arrangements for domestic business travel

Level 4 – 5 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

The tasks in this assessment are designed to show your assessor that you can:

- Establish domestic business travel needs.
- Develop domestic business travel plans and confirm business itinerary arrangements.
- Provide for domestic business travel funding and payment.
- Provide administrative support before and during domestic business travel.
- Evaluate feedback received for domestic business travel arrangements.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Manager or Team Leader Verification form, and Traveller Verification form.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

1. Relevant legislation includes
 - Health and Safety in Employment Act 1992
 - Privacy Act 1993
 - and any other applicable legislation.
2. The itineraries used must be complex in nature.
3. Your actual work situation with real itineraries will usually be used for this assessment. Alternatively you may use simulated work situations designed to draw upon similar performance to that required in work. You must show a consistency of performance throughout the assessment.
4. A minimum of two domestic business travel arrangements must be used, they must include overnight stays.
5. Definitions
 - Business itinerary* – this must detail meetings and other activities and commitments as well as the actual travel arrangements.
 - Complex* – this refers to a journey that includes at least two separate meetings, a conference or similar multi-function business event.

Domestic travel – This means travel within New Zealand only.

Assessment Task One – Elements 1 and 2

Introduction

The purpose of this task is to assess your ability to:

- Establish domestic business travel needs.
- Develop domestic business travel plans and confirm business itinerary arrangements.

Instructions

- a) Consider the administrative framework that exists between your organisation and travel agents and travel suppliers such as airlines and hotels.
- b) Then consider at least two occasions where you have made/are going to make arrangements for business travel within New Zealand that involve complex itineraries and overnight stays. Remember, *complex* means a journey that includes at least two separate meetings, a conference or similar multi-function business event.

You may use arrangements where the trip has already happened, as long as it was within the last 12 months and the person you made the arrangements for is able to offer feedback.

Gather the following information and compile it into a portfolio. Your assessor will then peruse it. They may wish to ask you further questions to check your understanding.

- Organisational policy and procedures for the authorisation, organisation, co-ordination, documentation and payment for domestic business travel.
 - include arrangements with bonded travel agents and suppliers

For the two instances of domestic travel you have or are going to organise:

- The travel objectives as established with the travellers. These include:
 - period of travel
 - mode of travel
 - accommodation requirements
 - travel authorisation
 - budget requirements

These must all be confirmed in accordance with the policies of the organisation.

- Any supplementary travel services required e.g.:
 - transfers
 - car hire
 - valet services
 - baggage handling
 - travel insurance
- Systems of communication required by the travellers e.g.:

- mobile phone
 - laptop
 - email and internet
 - data projector
 - facsimile
 - teleconference facilities
 - voice mail system
- Quotes for services required.
 - Itinerary options – there may be more than one option the traveller can take. Ensure these options include all required services and costs. You must also provide evidence of having explain the advantages and disadvantages of the options to the travellers. There is a Feedback Form in Task Four that can assist with providing this evidence.
 - Evidence of having confirmed the preferred itinerary with the traveller.
 - Evidence of having confirmed travel bookings, including supplementary services. Systems of communication are also confirmed.

Please ask your manager to complete the Manager's Verification form included in this guide. This is to confirm that you have accessed travel information and completed travel arrangements in accordance with established procedures.

Assessment Task Two – Elements 1 and 2

Introduction

The purpose of this task is to assess your ability to

- Establish domestic business travel needs.
- Develop domestic business travel plans and confirm business itinerary arrangements.

Instructions

You must provide your assessor with two complex itineraries for domestic business travel for the arrangements discussed in Task One.

- The itineraries should show evidence of:
 - sequential listings of destinations
 - departure dates, times and codes for transport
 - accommodation details
 - details of travel and transfer vouchers
 - details of business meetings, conferences and commitments.

Assessment Task Three – Elements 2, 3, 4 and 5

Introduction

The purpose of this task is to assess your ability to:

- Develop domestic business travel plans and confirm business itinerary arrangements.
- Provide for domestic business travel funding and payment.
- Provide administrative support before and during domestic business travel.
- Evaluate feedback received for domestic business travel arrangements.

Instructions

Please answer the following questions. You may answer orally or in writing. If you choose to answer orally your assessor will make a record of your answers. Written answers should be on separate paper with your name on each page. Please use the travel arrangements referred to in Tasks One and Two where possible as your reference when answering these questions.

You may give direct answers and/or documentation pertaining to the question as evidence.

Questions

1. How do you discuss the benefits and constraints involved in an individual travel plan with the person travelling, so as to achieve the best result?
2. What provisions are there for altering travel plans and what penalties will your organisation incur if variation to the travel plans is necessary?
3. Explain the procedure for making payments to the travel agent/service providers, beginning with the authorising of requests for payment through to payment being processed. You should provide evidence of having done this for two complex itineraries.
4. What are the procedures for documenting and reimbursing travel expenses? Ensure these are explained to the travellers.
5. What method(s) will you use to communicate with the travellers while they are away?
6. What arrangements have you made for making any required changes to the itineraries once the travel has been finalised? What insurance arrangements have been made regarding this?

7. What variations to the arrangements have been made? How did you action these changes and record them?

8. What are the reporting requirements for travel in your organisation? Include copies of the reports for the arrangements made in Task One.

9. Give examples of instances where you have communicated with the travellers whilst they were away and have actioned additional requirements.

10. How did you obtain feedback from the travellers with regards to the standard of services provided and how satisfied or dissatisfied they were with those services?

11. Give an evaluation of the feedback you have received. Identify areas that could be improved in the future.

Assessment Task Four – All Elements

Introduction

The purpose of this task is to assess the learner's ability to:

- Establish domestic business travel needs.
- Develop domestic business travel plans and confirm business itinerary arrangements.
- Provide for domestic business travel funding and payment.
- Provide administrative support before and during domestic business travel.
- Evaluate feedback received for domestic business travel arrangements.

Instructions

- a) Please ask the travellers whose itineraries you have used for the previous tasks to complete the attached Verification Form. This is to confirm that you have performed the activities in the previous tasks to the satisfaction of the persons travelling.

Please copy the form and give one to each traveller.

- b) Please ask your Manager or Team Leader to complete the Manager Verification Form included in this guide. This is to provide additional confirmation of your performance of these tasks.

Manager/Team Leader Verification Form

Name of Learner:	
Name of Verifier:	Phone:
Relationship to Learner:	

_____ is currently being assessed toward Unit Standard 21864 Manage travel arrangements for domestic business travel.

Purpose of this form

Learners use this form to gain feedback to support their assessment for this unit standard. This form should be completed by the learner’s team leader or manager, who has observed the learner in a situation where they had the opportunity to demonstrate their competence in the performance criteria for this unit standard.

For domestic travel arrangements with complex itineraries organised by the learner, do you believe the learner has met the requirements of each of the following areas?

Activity	Performed correctly?
Learner follows organisational policy when arranging, authorising and paying for business travel.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner establishes travel objectives with the travellers including supplementary travel requirements.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner accesses current travel information, including reference material, accommodation guides and timetables when developing travel plans.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner establishes the costs of various travel services and develops itinerary options that meet the required needs of the travellers.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner finalises travel arrangements with the suppliers and compiles detailed itineraries.	Yes <input type="checkbox"/> No <input type="checkbox"/>
The learner uses the correct processes to confirm travel bookings and supplementary services.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner identifies provisions and penalties for altering travel plans.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Activity	Performed correctly?
All payment for travel is processed correctly, including reimbursements.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner organises contingencies for altering travel once it has commenced, including insurance. They act upon any variations correctly.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner establishes procedures for contacting the traveller and keeps the communication channels open.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner correctly follows travel reporting requirements.	Yes <input type="checkbox"/> No <input type="checkbox"/>
Learner receives feedback from travellers and evaluates it to identify areas for improvement.	Yes <input type="checkbox"/> No <input type="checkbox"/>

Comments (you can use this section to elaborate on any special features of this activity, and to take notes for your own feedback to the learner. Continue on another sheet if necessary, and attach to this form. Note: The assessor will discuss your comments with the learner, so only record comments you are comfortable sharing.)

Thank you for your assistance.

Signed: _____

Date: _____

Traveller Verification Form

Name of Learner:		
Name of Traveller		Phone:
Date and place of travel:		

_____ is currently being assessed toward Unit Standard
21864 Manage travel arrangements for domestic business travel.

Please answer the following questions as honestly as possible. The assessor may contact you to discuss the learner's performance.

1. Did the learner discuss your travel needs with you in a manner that gave them a clear indication of your requirements including when the travel would take place, your accommodation needs and supplementary travel services?

2. Did the learner discuss the itinerary with you and recommend the best option in accordance with your requirements?

3. Did the finalised business travel itinerary meet your requirements? In what ways did it/did it not meet your needs?

4. How did the learner address any variations to the itinerary that may have occurred before and during your travel?

5. Did the learner keep in contact with you during your trip? What contact methods were used and were these methods appropriate?

6. Were the reimbursement of travel expenses efficiently processed by the learner? How were you reimbursed?

Any other comments?

The assessor may contact you to discuss the learner's performance.

Signed: _____

Date: _____

Thank you for your assistance.

Assessment Guide

This is the assessment guide your assessor will use to assess your competence in unit standard 21864.

Element	Task	Evidence required	Judgement
<p>Element 1</p> <p>Establish domestic business travel needs.</p>	<p>Tasks 1, 2 and 4</p>	<p>Portfolio documentation. This should include.</p> <ul style="list-style-type: none"> • The organisation's travel policy and processes. • Agreements with bonded travel agents and travel suppliers. • Copies of requests for travel. • Copies of travel resources. • Supplementary travel requirements. • Communication systems required by travellers. • All related documentation to the travel. <p>Appropriate sections of Manager's Verification Form and Traveller Feedback Forms completed.</p> <p>Assessor notes.</p>	<p>Learner confirms the organisation's policy for business travel. This must include:</p> <ul style="list-style-type: none"> • Authorisation • Organisation • Coordination • Documentation • Payment • Any agreements with bonded travel agents and travel suppliers. <p>All arrangements made are within organisational policy.</p> <p>Learner establishes the travel objectives with the travellers. This includes</p> <ul style="list-style-type: none"> • destination(s) • period of travel • mode of travel • accommodation • authorisation • budget. <p>Learner establishes supplementary travel services required. This may include:</p> <ul style="list-style-type: none"> • transfers • car hire • valet requirements • baggage handling • insurance. <p>Learner establishes communication systems required e.g.</p> <ul style="list-style-type: none"> • mobile phone • laptop • email and internet access • data projector etc.
<p>Element 2</p> <p>Develop domestic</p>	<p>All Tasks.</p>	<p>Portfolio as required in Task One, containing</p> <ul style="list-style-type: none"> • itinerary options 	<p>Manager confirms learner accesses current travel information including reference</p>

Element	Task	Evidence required	Judgement
business travel plans and confirm business itinerary arrangements.		<ul style="list-style-type: none"> costs of services required. <p>Two complex detailed business itineraries as detailed in Task Two.</p> <p>Answer to Task Three Q 1.</p> <p>Appropriate sections Manager Verification Form and Traveller Verification Forms completed for Task Four.</p>	<p>materials, timetables and accommodation guides to develop travel plans that match the needs of the traveller.</p> <p>Learner establishes the required services and costs with the travel suppliers and develops itinerary options that meet the traveller's requirements and costs.</p> <p>The learner explains the advantages and disadvantages of the itinerary options and confirms that choice of itinerary and additional services with the traveller.</p> <p>Learner finalises the itinerary arrangements and travel bookings with the travel suppliers and produces a detailed itinerary. The itinerary may include:</p> <ul style="list-style-type: none"> sequential listings of destinations departure dates, times and codes for transport accommodation details details of travel and transfer vouchers details of business meetings, conferences and commitments. <p>The learner uses the correct processes and authorisations to confirm the arrangements.</p>
Element 3 Provide for domestic business travel funding and payment.	Tasks 3 and 4	<p>Answers to Task Three Questions 2 – 4.</p> <p>Appropriate sections Manager Verification Form and Traveller Verification Forms completed for Task Four.</p>	<p>Learner identifies how arrangements can be changed and the costs involved.</p> <p>Learner documents and processes payment correctly and establishes reimbursement procedures with the traveller.</p> <p>All payments and authorisations must be within organisational policy and procedure.</p>

Element	Task	Evidence required	Judgement
<p>Element 4 Provide administrative support before and during domestic business travel.</p>	<p>Tasks 3 and 4</p>	<p>Answers to Task Three Questions 5 – 9.</p> <p>Appropriate sections Manager Verification Form and Traveller Verification Forms completed for Task Four.</p>	<p>Learner establishes communication procedures with the traveller and ensures an open line of communication is kept throughout the trip.</p> <p>Learner establishes arrangements for amendments to the travel, including insurance arrangements.</p> <p>Learner records and acts upon variation to the travel in line with procedure.</p> <p>Learner identifies and complies with travel reporting procedure.</p>
<p>Element 5 Evaluate feedback received for domestic business travel arrangements.</p>	<p>Tasks 3 and 4</p>	<p>Answers to Task Three Questions 10 and 11.</p> <p>Appropriate sections Manager Verification Form and Traveller Verification Forms completed for Task Four.</p>	<p>Learner receives and evaluates feedback from the traveller.</p> <p>The learner establishes what was satisfactory and what was not, and identifies areas for future improvement.</p>