



Australian Government

Department of Education, Employment and Workplace Relations

FDFCD2001A Conduct winery and or site tours

Release 3

FDFCD2001A Conduct winery and or site tours

Modification History

This unit supersedes and is equivalent to FDFCDSWSTB Conduct winery and/or site tours.

September 2012: clarified pre-requisite information.

April 2012: Minor typographical corrections.

Unit Descriptor

Unit descriptor	This specialist unit has been developed for the cellar door sales stream of the wine sector. It covers the skills and knowledge required to conduct winery and/or site tours for a variety of domestic and overseas visitors.
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Application of the Unit

Application of the unit	This unit applies to cellar door staff of winemaking enterprises that conduct tours of their operations. The unit can apply to wineries of different sizes, locations and product ranges as well as to distilleries. The unit covers the preparation, conduct and evaluation of tours including presentations and monitoring of tour members for occupational health and safety (OHS) and compliance with regulations and procedures to minimise the distribution of pests and diseases.
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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	FDFCD2002A	Promote wine tourism information* <i>SIRXCCS202 Interact with customers</i>
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Employability Skills Information

Employability skills	This unit contains employability skills.
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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for tour	1.1 Size, composition and specialised requirements for touring party are established 1.2 Background research is carried out to ensure the tour presentation includes up-to-date and appropriate information 1.3 Tour and materials are planned and prepared to meet customer and enterprise objectives
2. Conduct tour	2.1 Tour group is welcomed and briefed according to workplace procedures 2.2 Members of tour are informed of, and comply with, enterprise OHS regulations and precautions before and during tour 2.3 Presentations given to tour members contain the level of specialised and technical information appropriate to the group's requirements 2.4 Special facilities, services and hospitality arrangements are provided as required 2.5 Presentations are given in a place where tour members can hear easily (where practical) 2.6 Tour members are invited to ask questions and seek further explanation 2.7 The welfare and comfort of tour members is maintained at all times according to workplace procedures
3. Evaluate and assess performance	3.1 Tour members and/or accompanying staff are asked to participate in a review procedure, as required by the enterprise 3.2 Self-assessment of performance is carried out in accordance with workplace procedures 3.3 Positive and negative aspects of the way the tour was conducted are recognised and addressed 3.4 Feedback from tour members is dealt with according to workplace policy

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills include:

Note: The following required skills should be applied as appropriate to the equipment and processes that are used in the particular winery or workplace.

Ability to:

- access workplace information to identify tour requirements
- liaise with other work areas. These may include tasting area, public relations, winemaker, cellar, vineyard manager and hospitality coordinator
- apply a high standard of personal presentation. This may include personal hygiene, dress or uniform
- identify requirements of touring party. These may include:
 - date
 - times of arrival and departure
 - other activities either side of the tour
 - members
 - objectives of tour
 - special needs and requests (e.g. wheelchair access)
- conduct effective background research, including up-to-date and accurate information relevant to customer and enterprise objectives
- plan and prepare tour and supporting materials. This may include:
 - mapping out route based on OHS requirements, site activities, weather, customer and enterprise tour objectives
 - checking availability of OHS equipment, such as hard hats, first aid kits and mobile phones
 - confirming availability and operation of microphones and other presentation equipment
 - liaising with site staff and confirming availability of relevant expertise
 - organising and briefing support staff as required
 - preparing handouts and overhead projector slides
 - preparing presentation content, location and timing
 - preparing for special requests
 - coordinating handovers of group to tasting or hospitality areas
- welcome and brief tour group. This may include:
 - identifying group leader and confirming procedures and activities
 - explaining itinerary, route and timing
 - pointing out toilets
 - indicating drink facilities
- inform tour members of enterprise OHS requirements and precautions before the tour. These may involve:

- forklift and other vehicle movements
- hard hats, safety glasses and ear plugs
- operating machinery
- wet floors
- uneven surfaces, steps, pipes and hoses
- liquid, solid and gaseous chemical hazards
- footwear (e.g. flat, practical shoes)
- fire and other emergency procedures
- precautions against sunstroke
- signing in and staying in a group
- children
- monitor tour group activities with regard to:
 - enterprise OHS requirements and precautions
- observe any phylloxera quarantine requirements and processes. These may include:
 - keeping tour groups off vineyards
 - keeping to concrete surfaces, roads and paths
 - providing overshoes
 - providing disinfectant kits
 - drawing tour groups attention to signs
- identify non-compliance and rectify and/or report corrective action as required. This may include:
 - liaising with tour group leader
 - firmly and politely correcting visitor non-compliance
 - refusing to include one or more individuals in a tour, where appropriate
 - arranging alternative activity for individuals left behind
- deliver presentations to tour group. This may include:
 - including technical and specialised information appropriate to group
 - using terminology and examples appropriate to the group
 - storytelling techniques
 - stopping to talk in safe, quiet, shaded locations
 - inviting questions and clarification
 - answering questions accurately and seeking relevant expertise as required
 - utilising visual aids and production equipment
 - including production expertise as required
 - conveying positive body language
 - projecting voice effectively
 - including all of the group by means of eye contact and body language
 - effective use of timing
 - relating information to surroundings
 - effective microphone techniques

- recognise key equipment on site and explain its features and purpose in the production process. Key equipment may include:
 - receival hoppers
 - crushers
 - presses
 - fermenters
 - filters
 - centrifuge
 - casks
 - bottling and softpack filling equipment
 - labeller
 - distillers
 - provide special facilities as requested. These may include:
 - meeting the winemaker
 - seeing specific machinery in operation
 - conducting a tasting of product during the production process
 - accessing private parts of the winery
 - monitor and maintain the welfare and comfort of tour members at all times. This may include monitoring for signs of:
 - heat stress
 - tiredness
 - boredom
 - sickness or injury
- and may include:
- providing water
 - making more or less frequent stops
 - stopping where seats are available
 - changing the route and tour content
 - providing non-emergency first aid (e.g. bandaids)
 - deliver effective customer service
 - deliver tour according to designated time scales
 - maintain the safety and welfare of the group in an emergency situation. This may include:
 - following evacuation procedures
 - using emergency equipment (e.g. fire extinguishers)
 - contacting first aiders and emergency services
 - calling for backup
 - splitting and managing the group
 - remaining calm and controlled
 - using problem-solving techniques
 - identifying contingency plans

- evaluate the success of the tour and personal performance. This may include:
 - actively seeking feedback from tour group and staff
 - receiving negative and positive feedback
 - handling criticism positively and professionally
 - self-evaluation and review
 - identifying areas for improvement and potential solutions
- record workplace information
- maintain work area to meet housekeeping standards
- work cooperatively within a culturally diverse workforce

Required knowledge

Note: The following required knowledge should be applied as appropriate to the equipment and processes that are used in the particular winery or workplace.

Knowledge of:

- purpose and principles of conducting winery and/or site tours
- link to related work areas and activities
- workplace policies and procedures with regard to:
 - OHS of site visitors
 - emergency procedures
 - customer service
 - public relations and information transfer
 - personal presentation
 - winery and/or site tours
 - customer complaints
- workplace policies and procedures with regard to phylloxera, including:
 - the aphid and its effect on the vine
 - the threat to Australian vineyards and wine industry
 - resistant root stock
 - quarantine areas
 - method of infection (e.g. vine cuttings, soil, machinery, grape products and people)
 - procedures to reduce the risk of spread
 - keeping visitors off vineyard and soil
 - cleaning vehicles
 - overshoes or disinfection of footwear
 - signs and fencing
- principles and techniques in:
 - problem solving
 - planning and organising
 - researching, collating and summarising information
 - verbal presentation of information, including visual aids and microphones as required

- communication and body language
- group facilitation
- time management
- conflict resolution
- monitoring
- evaluation and review
- signs of customer discomfort and corrective action required
- brand and enterprise objectives
- product range and services provided by the enterprise
- information about enterprise operations including:
 - brief history of Australian wine making
 - history of enterprise
 - unique or memorable information specific to the enterprise or site
- wine (and non-wine if applicable) production methods and processes of the enterprise, including:
 - key vineyard techniques and purposes (e.g. night harvesting)
 - soil and climate characteristics (e.g. terra rossa)
 - the features and purpose of key processing equipment, such as press, fillers and fermenters
 - key vinification techniques and purposes (e.g. barrel fermentation, cool fermentation and oak treatment)
 - key facts and figures (e.g. litres per tank and number of bottles per year)
- procedures and responsibility for reporting problems
- recording requirements and procedures
- housekeeping requirements and procedures.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Assessment must be carried out in a manner that recognises the cultural and literacy requirements of the assessee and is appropriate to the work performed. Competence in this unit must be achieved in accordance with food safety standards and regulations.

Critical aspects for assessment and evidence required to demonstrate

Evidence of ability to:

EVIDENCE GUIDE

competency in this unit

- establish composition and requirements of tour group prior to the tour
- plan tour in advance, including liaising with staff in areas to be visited, preparation of handouts, and ensuring availability of any required protective equipment for tour members
- conduct welcome and pre-tour briefing, including giving information on OHS and any other special procedures
- conduct tour according to planned route and timing, including answering questions and making presentations
- monitor tour members during tour for OHS and security compliance
- demonstrate knowledge and skill in emergency procedures, including fire, evacuation and situations requiring first aid. This includes knowledge of and contact procedures for appropriate emergency resource personnel in the enterprise
- seek feedback from tour members at the end of the tour and evaluate tour.

EVIDENCE GUIDE

Context of and specific resources for assessment	Assessment must occur in a real or simulated workplace where the assessee has access to: • personal protective clothing and equipment as required • work procedures, including advice on company practices, safe work practices, food safety, quality and environmental requirements • instructions, information, specifications and schedules as required • equipment, services and corresponding information as required • products and materials as required • internal and external customers and suppliers as required • cleaning procedures, materials and equipment as required • documentation and recording requirements and procedures.
Method of assessment	This unit should be assessed together with other units of competency relevant to the function or work role.
Guidance information for assessment	To ensure consistency in one's performance, competency should be demonstrated on more than one occasion over a period of time in order to cover a variety of circumstances, cases and responsibilities, and where possible, over a number of assessment activities.

Range Statement**RANGE STATEMENT**

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Policies and procedures

Work is carried out in accordance with workplace procedures, licensing requirements and legislative requirements

RANGE STATEMENT	
Workplace information	Workplace information can include: • Standard Operating Procedures (SOPs) • workplace policy and procedures in regard to conducting winery and/or site tours • specifications • work notes • instructions or verbal direction from manager, supervisor or senior staff
Tour site	The tour site may be all or part of a winery or distillery and may include: • vineyards • cellar operations • warehouse • laboratory. The size, type and location of winery or production site may vary.
Tour clientele	Tour clientele may include: • people from a range of social, cultural or ethnic backgrounds, age and physical and mental abilities. English may not be their first language • VIPs • wine industry personnel • consumers
Products	Products may include: • wines and spirits • associated merchandise (e.g. corkscrews and glasses) • enterprise promotional merchandise (e.g. clothing and souvenirs)
Team members	Team members may include: • people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
Staff	Staff may: • be full-time, part-time or casual • work in other areas of the enterprise
Working conditions	Working conditions may be: • routine, busy or quiet

RANGE STATEMENT	
Information systems	Information systems may be: • print or screen based
Equipment	Equipment may vary, but should include that which is required to conduct winery and/or site tours according to workplace policies and procedures, and may include: • hard hats • microphone • visual aids • specific technical equipment required to illustrate a point • mobile phone • water bottle
Presentations	Presentations may include: • history of the enterprise • history of production in Australia • grape varieties • viticultural year • production methods • production equipment • bottling and packaging methods
Special arrangements	Special arrangements may include: • a specialised product tasting • provision of food • presentation of detailed information from the winemaker • arranging special privileges
Emergency situations	Emergency situations may include: • accidents or sickness • evacuations due to fire, gas leaks, chemical spill and bomb threats

Unit Sector(s)

Unit sector	Wine operations
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