

# Qualmark – Preparing for your assessment.

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This information will help you prepare for and get the most out of your Qualmark® assessment. The following explains the documentation that the assessor needs to sight, although no information needs to be kept by the assessor. The assessor will also gather further information by asking questions and observing your operation. Having the documentation listed here on hand at the time of the assessment will ensure the assessment process runs smoothly and will help make the best use of your time.

## **Must Haves:**

This information is required to pass your Qualmark assessment. The documentation pertains to either minimum requirements or criteria in the left hand column – which needs to be achieved in order to meet the 60% pass rate.

## **Additional Information:**

Showing this information to the assessor will ensure that you are given credit, where appropriate, for the systems your business has in place. Please do not be concerned if you do not have all of the documents itemised in the following information – they may not be relevant to your business.

If you have any queries about the following information or why certain documentation is required, please contact your Qualmark® Account Manager. They are more than happy to discuss any of the criteria requirements with you.

## **Section 1.1 Product Sale and Purchase (5%)**

### **Must Haves:**

- A copy of any promotional material e.g. brochure, rack card etc.
- A copy of any correspondence/documentation showing the cancellation policy and booking conditions e.g. confirmation letter/email, ticket, website, signage etc.

### **Additional Information:**

- Booking form(s)/system(s) clearly showing what information is captured eg. Diary, telephone booking sheet, computer system, booking information from wholesalers etc.

## **Section 1.2 Customer Satisfaction and Feedback (20%)**

This section is not about how satisfied your customers are, but about the systems your operation has in place to help ensure customer satisfaction and how well you know whether they are satisfied or not. This section looks at the systems in place, the variety of ways feedback is invited and solicited and how this information is captured, analysed and used to make ongoing improvements.

### **Additional Information:**

- Examples of recent visitor feedback e.g. visitors book, feedback cards, website feedback etc.
- Unsolicited praise e.g. letters, emails etc.
- Feedback analysis e.g. any graphs, trends, spreadsheets that have been produced from visitor feedback

## **Section 2.1 Facilities, Equipment and Surrounds (20%)**

The information required for this section will vary for each business. "Facilities" means buildings in the case of operations such as restaurants, shops and attractions; or vessels in the case of jet boat and charter boat operators; or coaches in the case of tour operators, etc. These are facilities and services that may be provided on or off-site and either free of charge or as optional extras.

### **Must Haves:**

- Where applicable, your Building Warrant of Fitness
- Where applicable, your Passenger Service Licence and a copy of staff licences' showing the P endorsement. If you are carrying/transporting passengers you may be required to have a passenger service licence. If you don't already have one for your vehicle and staff members, we suggest you contact the LTSA and find out if one is required. We have a checklist to help you prepare for obtaining one.
- Where applicable, Vehicle Warrant of Fitness or Certificate of Fitness

### **Additional Information:**

- Inspection and maintenance documentation for equipment and/or vehicles
- Replacement schedules - documentation showing plans for any ongoing facility and equipment upgrades and/or replacements
- Drivers logs - copies of each driver's relevant licensing information

## **Section 3.1 People Management, Development and Well Being (15%)**

### **Must Haves:**

- Staff contracts (sensitive information can be covered/removed)

### **Additional Information:**

- Certificates or other documentation showing training completed by staff
- Staff position or job descriptions
- Training documentation e.g. induction plans, job-specific training checklists etc.

## **Section 4.1 Environmental Responsibility (8%)**

### **Must Haves:**

- Any and all statutory licences and permits eg. DOC concession, liquor licences, council consents etc.

### **Additional Information:**

- Environmental impact reports
- Environmental management plans
- Documentation showing participation in an environmental programme eg. Green Globe membership information, regional sustainable tourism initiatives etc
- Environmental interpretation plan - this is relevant to businesses offering nature tourism experiences

## **Section 4.2 Heritage and Cultural Considerations (7%)**

### **Must Haves:**

- Where applicable, interpretation plan or relevant qualifications for core staff
- Where applicable, safety briefing cards appropriate for non-English speaking visitors

### **Additional Information:**

- Multilingual interpretation material offering information to visitors in languages other than English

## **Section 5.1 Health and Safety (10%)**

### **Must Haves:**

- Health and safety plan. Many requirements in the area of Health and Safety are based on your Health and Safety plan. You will need to make sure that this is up to date, a working document and meeting statutory requirements. We have a basic OSH Health and Safety template that we can provide you with if you need assistance.
- Copies of first aid certificates held by staff. Please check that these are up to date prior to the assessment. As a guide there should always be at least one staff member with a first aid certificate on site. Operations that offer activities with an element of risk will have different requirements.
- Formal employee acknowledgement showing that all employees have read and understood your Health & Safety plan. This may be a signed page incorporated in the plan.

### **Additional Information:**

- Minutes of health and safety meetings
- Operations manual outlining your daily operations procedures. This needs to cover your policies and procedures for customers (eg. minimum age, height), pre-activity (eg. staff briefing), during activity (eg. customer monitoring) and post-activity (eg. equipment and maintenance checks)
- Copy of liability waiver/disclaimer. If you operate an adventure tourism business, and use a liability waiver, there is a requirement that it does not dishonour any legal obligations. We have a liability waiver template and explanatory notes to help you write one or update your current one.
- Log showing dates of completed emergency scenario drills
- Full crisis plan

## **Section 6.1 Business Management and Overall Performance (15%)**

### **Must Haves:**

- Public Liability Insurance certificate showing cover of at least \$1million including punitive and exemplary damages. Please check this on your insurance statement. You may need to talk to your insurance broker to have this extension added if you don't already have it.

### **Additional Information:**

- Certificates or awards gained by the business eg. Tourism awards, business awards etc.
- Proof of membership of relevant industry associations eg. TIANZ certificate, ITOC membership etc.
- Service level agreements with suppliers. A Service Level Agreement Template is available from Qualmark® and may be of assistance if you are using other operators as part of your experience
- Minutes of meetings with suppliers
- Financial and performance reports (sensitive figures can be removed/covered)
- Business/marketing plan