



NATIONAL CERTIFICATES (VOCATIONAL)

ASSESSMENT GUIDELINES

TOURISM OPERATIONS NQF Level 4

September 2007

TOURISM OPERATIONS – LEVEL 4

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SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

This document provides the lecturer with guidelines to develop and implement a coherent, integrated assessment system for Tourism Operations in the National Certificates (Vocational). It must be read with the *National Policy Regarding Further Education and Training Programmes: Approval of the Documents, Policy for the National Certificates (Vocational) Qualifications at Levels 2 to 4 on the National Qualifications Framework (NQF)*. This assessment guideline will be used for National Qualifications Framework Levels 2-4.

This document explains the requirements for the internal and external subject assessment. The lecturer must use this document with the *Subject Guidelines: Tourism Operations* to prepare for and deliver Tourism Operations. Lecturers should use a variety of resources and apply a range of assessment skills in the setting, marking and recording of assessment tasks.

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

1 ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

Assessment in the National Certificates (Vocational) is underpinned by the objectives of the National Qualifications Framework (NQF). These objectives are to:

- Create an integrated national framework for learning achievements.
- Facilitate access to and progression within education, training and career paths.
- Enhance the quality of education and training.
- Redress unfair discrimination and past imbalances and thereby accelerate employment opportunities.
- Contribute to the holistic development of the student by addressing:
 - social adjustment and responsibility;
 - moral accountability and ethical work orientation;
 - economic participation; and
 - nation-building.

The principles that drive these objectives are:

- **Integration**

To adopt a unified approach to education and training that will strengthen the human resources development capacity of the nation.

- **Relevance**

To be dynamic and responsive to national development needs.

- **Credibility**

To demonstrate national and international value and recognition of qualification and acquired competencies and skills.

- **Coherence**

To work within a consistent framework of principles and certification.

- **Flexibility**

To allow for creativity and resourcefulness when achieving Learning Outcomes, to cater for different learning styles and use a range of assessment methods, instruments and techniques.

- **Participation**

To enable stakeholders to participate in setting standards and co-ordinating the achievement of the qualification.

- **Access**

To address barriers to learning at each level to facilitate students' progress.

- **Progression**

To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

- **Portability**

To enable students to transfer credits of qualifications from one learning institution and/or employer to another institution or employer.

- **Articulation**

To allow for vertical and horizontal mobility in the education system when accredited pre-requisites have been successfully completed.

- **Recognition of Prior Learning**

To grant credits for a unit of learning following an assessment or if a student possesses the capabilities specified in the outcomes statement.

- **Validity of assessments**

To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:

- clearly stating the outcome to be assessed;
- selecting the appropriate or suitable evidence;
- matching the evidence with a compatible or appropriate method of assessment; and
- selecting and constructing an instrument(s) of assessment.

- **Reliability**

To assure assessment practices are consistent so that the same result or judgment is arrived at if the assessment is replicated in the same context. This demands consistency in the interpretation of evidence; therefore, careful monitoring of assessment is vital.

- **Fairness and transparency**

To verify that no assessment process or method(s) hinders or unfairly advantages any student. The following could constitute unfairness in assessment:

- Inequality of opportunities, resources or teaching and learning approaches
- Bias based on ethnicity, race, gender, age, disability or social class
- Lack of clarity regarding Learning Outcome being assessed
- Comparison of students' work with other students, based on learning styles and language

- **Practicability and cost-effectiveness**

To integrate assessment practices within an outcomes-based education and training system and strive for cost and time-effective assessment.

2 ASSESSMENT FRAMEWORK FOR VOCATIONAL QUALIFICATIONS

The assessment structure for the National Certificates (Vocational) qualification is as follows:

2.1 Internal continuous assessment (ICASS)

Knowledge, skills values, and attitudes (SKVAs) are assessed throughout the year using assessment instruments such as projects, tests, assignments, investigations, role-play and case studies. The internal continuous assessment (ICASS) practical component is undertaken in a real workplace, a workshop or a "Structured Environment". This component is moderated internally and quality assured externally by Umalusi. All internal continuous assessment (ICASS) evidence is kept in a Portfolio of Evidence (PoE) and must be readily available for monitoring, moderation and verification purposes.

2.2 External summative assessment (ESASS)

The external summative assessment is either a single or a set of written papers set to the requirements of the Subject Learning Outcomes. The Department of Education administers the theoretical component according to relevant assessment policies.

A compulsory component of external summative assessment (ESASS) is the **integrated summative assessment task (ISAT)**. This assessment task draws on the students' cumulative learning throughout the year. The task requires **integrated application of competence** and is executed under strict assessment conditions. The task should take place in a simulated or "Structured Environment". The integrated summative assessment task (ISAT) is the most significant test of students' ability to apply their acquired knowledge.

The integrated assessment approach allows students to be assessed in more than one subject with the same integrated summative assessment task (ISAT).

External summative assessments will be conducted annually between October and December, with provision made for supplementary sittings.

3 MODERATION OF ASSESSMENT

3.1 Internal moderation

Assessment must be moderated according to the internal moderation policy of the Further Education and Training (FET) college. Internal college moderation is a continuous process. The moderator's involvement starts with the planning of assessment methods and instruments and follows with continuous collaboration with and support to the assessors. Internal moderation creates common understanding of Assessment Standards and maintains these across vocational programmes.

3.2 External moderation

External moderation is conducted by the Department of Education, Umalusi and, where relevant, an Education and Training Quality Assurance (ETQA) body according to South African Qualifications Authority (SAQA) and Umalusi standards and requirements.

The external moderator:

- monitors and evaluates the standard of all summative assessments;
- maintains standards by exercising appropriate influence and control over assessors;
- ensures proper procedures are followed;
- ensures summative integrated assessments are correctly administered;
- observes a minimum sample of ten (10) to twenty-five (25) percent of summative assessments;
- gives written feedback to the relevant quality assessor; and
- moderates in case of a dispute between an assessor and a student.

Policy on inclusive education requires that assessment procedures be customised for students who experience barriers to learning and supported to enable these students to achieve their maximum potential.

4 PERIOD OF VALIDITY OF INTERNAL CONTINUOUS ASSESSMENT (ICASS)

The period of validity of the internal continuous assessment mark is determined by the *National Policy on the Conduct, Administration and Management of the Assessment of the National Certificates (Vocational)*.

The internal continuous assessment (ICASS) must be re-submitted with each examination enrolment for which it constitutes a component.

5 ASSESSOR REQUIREMENTS

Assessors must be subject specialists and should ideally be declared competent against the standards set by the ETDP SETA. If the lecturer conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process in order to ensure the quality and integrity of assessments.

6 TYPES OF ASSESSMENT

Assessment benefits the student and the lecturer. It informs students about their progress and helps lecturers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.

6.1 Baseline assessment

At the beginning of a level or learning experience, baseline assessment establishes the knowledge, skills, values and attitudes (SKVAs) that students bring to the classroom. This knowledge assists lecturers to plan learning programmes and learning activities.

6.2 Diagnostic assessment

This assessment diagnoses the nature and causes of learning barriers experienced by specific students. It is followed by guidance, appropriate support and intervention strategies. This type of assessment is useful to make referrals for students requiring specialist help.

6.3 Formative assessment

This assessment monitors and supports teaching and learning. It is used to determine student strengths and weaknesses and provides feedback on progress. It determines if a student is ready for summative assessment.

6.4 Summative assessment

This type of assessment gives an overall picture of student progress at a given time. It determines whether the student is sufficiently competent to progress to the next level.

7 PLANNING ASSESSMENT

An assessment plan should cover three main processes:

7.1 Collecting evidence

The assessment plan indicates which Subject Outcomes and Assessment Standards will be assessed, what assessment method or activity will be used and when this assessment will be conducted.

7.2 Recording

Recording refers to the assessment instruments or tools with which the assessment will be captured or recorded. Therefore, appropriate assessment instruments must be developed or adapted.

7.3 Reporting

All the evidence is put together in a report to deliver a decision for the subject.

8 METHODS OF ASSESSMENT

Methods of assessment refer to who carries out the assessment and includes lecturer assessment, self-assessment, peer assessment and group assessment.

LECTURER ASSESSMENT	The lecturer assesses students' performance against given criteria in different contexts, such as individual work, group work, etc.
SELF-ASSESSMENT	Students assess their own performance against given criteria in different contexts, such as individual work, group work, etc.
PEER ASSESSMENT	Students assess another student's or group of students' performance against given criteria in different contexts, such as individual work, group work, etc.
GROUP ASSESSMENT	Students assess the individual performance of other students within a group or the overall performance of a group of students against given criteria.

9 INSTRUMENTS AND TOOLS FOR COLLECTING EVIDENCE

All evidence collected for assessment purposes is kept or recorded in the student's PoE.

The following table summarises a variety of methods and instruments for collecting evidence. A method and instrument is chosen to give students ample opportunity to demonstrate that the Subject Outcome has been attained. This will only be possible if the chosen methods and instruments are appropriate for the target group and the Specific Outcome being assessed.

	METHODS FOR COLLECTING EVIDENCE		
	Observation-based (Less structured)	Task-based (Structured)	Test-based (More structured)
Assessment instruments	• Observation • Class questions • Lecturer, student, parent discussions	• Assignments or tasks • Projects • Investigations or research • Case studies • Practical exercises • Demonstrations • Role-play • Interviews	• Examinations • Class tests • Practical examinations • Oral tests • Open-book tests
Assessment tools	• Observation sheets • Lecturer's notes • Comments	• Checklists • Rating scales • Rubrics	• Marks (e.g. %) • Rating scales (1-7)
Evidence	• Focus on individual students • Subjective evidence based on lecturer observations and impressions	Open middle: Students produce the same evidence but in different ways. Open end: Students use same process to achieve different results.	Students answer the same questions in the same way, within the same time.

10 TOOLS FOR ASSESSING STUDENT PERFORMANCE

Rating scales are marking systems where a symbol (such as 1 to 7) or a mark (such as 5/10 or 50%) is defined in detail. The detail is as important as the coded score. Traditional marking, assessment and evaluation mostly used rating scales without details such as what was right or wrong, weak or strong, etc.

Task lists and **checklists** show the student what needs to be done. These consist of short statements describing the expected performance in a particular task. The statements on the checklist can be ticked off when the student has adequately achieved the criterion. Checklists and task lists are useful in peer or group assessment activities.

Rubrics are a hierarchy (graded levels) of criteria with benchmarks that describe the minimum level of acceptable performance or achievement for each criterion. Using rubrics is a different way of assessing and cannot be compared to tests. Each criterion described in the rubric must be assessed separately. Mainly two types of rubrics, namely holistic and analytical, are used.

11 SELECTING AND/OR DESIGNING RECORDING AND REPORTING SYSTEMS

The selection or design of recording and reporting systems depends on the purpose of recording and reporting student achievement. **Why** particular information is recorded and **how** it is recorded determine which instrument will be used.

Computer-based systems, for example spreadsheets, are cost and time effective. The recording system should be user-friendly and information should be easily accessed and retrieved.

12 COMPETENCE DESCRIPTIONS

All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not be simply a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) that a student must demonstrate to achieve each level of the rating scale.

When lecturers or assessors prepare an assessment task or question, they must ensure that the task or question addresses an aspect of a Subject Outcome. The relevant Assessment Standard must be used to create the rubric to assess the task or question. The descriptions must clearly indicate the minimum level of attainment for each category on the rating scale.

13 STRATEGIES FOR COLLECTING EVIDENCE

A number of different assessment instruments may be used to collect and record evidence. Examples of instruments that can be (adapted and) used in the classroom include:

13.1 Record sheets

The lecturer observes students working in a group. These observations are recorded in a summary table at the end of each project. The lecturer can design a record sheet to observe students' interactive and problem-solving skills, attitudes towards group work and involvement in a group activity.

13.2 Checklists

Checklists should have clear categories to ensure that the objectives are effectively met. The categories should describe how the activities are evaluated and against what criteria they are evaluated. Space for comments is essential.

SECTION C: ASSESSMENT IN TOURISM OPERATIONS

1 SCHEDULE OF ASSESSMENT

At NQF levels 2, 3 and 4, lecturers will conduct assessments as well as develop a schedule of formal assessments that will be undertaken in the year. All three levels also have an external examination that accounts for 50 percent of the total mark. The marks allocated to assessment tasks completed during the year, kept or recorded in a PoE account for the other 50 percent.

The PoE and the external assessment include practical and written components. The practical assessment in Tourism Operations must, where necessary, be subjected to external moderation by Umalusi or an appropriate Education and Training Quality Assurance (ETQA) body, appointed by the Umalusi Council in terms of Section 28(2) of the *General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001)*.

2 RECORDING AND REPORTING

Tourism Operations, as is the case for all the other Vocational subjects, is assessed according to five levels of competence. The level descriptions are explained in the following table.

Scale of Achievement for the Vocational component

RATING CODE	RATING	MARKS %
5	Outstanding	80-100
4	Highly Competent	70-79
3	Competent	50-69
2	Not yet competent	40-49
1	Not achieved	0-39

The programme of assessment should be recorded in the Lecturer's Portfolio of Assessment for each subject. The following at least should be included in the Lecturer's Assessment Portfolio:

- A contents page
- The formal schedule of assessment
- The requirements for each assessment task
- The tools used for each assessment task
- Recording instrument(s) for each assessment task
- A mark sheet and report for each assessment task

The college must standardise these documents.

The student's PoE must include at least:

- A contents page
- The assessment tasks according to the assessment schedule
- The assessment tools or instruments for the task
- A record of the marks (and comments) achieved for each task

Where a task cannot be contained as evidence in the PoE, its exact location must be recorded and it must be readily available for moderation purposes.

The following units guide internal assessment in Tourism Operations.

LEVEL 2		
NUMBER OF UNITS	ASSESSMENT	COVERAGE
5	Closed-book class test(s) on theory	One or more per completed topic
4	Open-book formal test to prove competence in application	One per completed topic
1	Internal written exam	All completed topics
10 (e.g. two per topic)	Practical assessments	As suggested in the Assessment Guidelines: Assessment Tasks or Activities Must cover the related Subject Outcomes

LEVEL 3		
NUMBER OF UNITS	ASSESSMENT	COVERAGE
4	Closed-book class test(s) on theory	Two or more per completed topic
4	Open-book formal test to prove competence in application	Two per completed topic
1	Internal written exam	All completed topics
8	Practical assessments	As suggested in the Assessment Guidelines: Assessment Tasks or Activities Must cover the related Subject Outcomes

LEVEL 4		
NUMBER OF UNITS	ASSESSMENT	COVERAGE
4	Closed-book class test(s) on theory	One or more per completed topic
4	Open-book formal test to prove competence in application	One or more per completed topic
1	Internal written exam	All completed topics
6	Practical assessments	As suggested in the Assessment Guidelines: Assessment Tasks or Activities Must cover the related Subject Outcomes

ASSESSMENT OF TOURISM OPERATIONS

LEVEL 4

3 INTERNAL ASSESSMENT OF SUBJECT OUTCOMES IN TOURISM OPERATIONS - LEVEL 4

Topic 1: Basic foreign exchange transactions and conversions

SUBJECT OUTCOME	
1.1 Demonstrate basic knowledge about foreign exchange.	
ASSESSMENT STANDARD	LEARNING OUTCOME
The current annual SA travel allowance for adults and children is known.	State the current annual SA travel allowance for adults and children.
Annual travel allowance is explained.	Describe what a travel allowance is and how it applies throughout one calendar year.
Omnibus allowance is explained.	Briefly explain omnibus allowance available for companies and for frequent overseas business travel.
Various ways of taking forex to other countries are explained, covering the range suggestions.	List the various ways of taking forex out of the country <i>Range: Electronic transfers, telegraphic transfers, bank drafts, traveller's cheques, cash, cash cards.</i>
The advantages and disadvantages of each method are described.	Describe the advantages and disadvantages of each method.
Describe how traveller's cheques work; how to obtain and how to redeem them and that commission is involved.	Explain how the system of traveller's cheques works.
Accessing funds in other countries is described.	Describe how a customer can access funds in other countries.
The time limits regarding the buying and selling of forex are explained.	Explain the time limits regarding the purchasing and selling of forex.
ROE, BBR and BSA are explained.	Explain what the terms Rate Of Exchange (ROE), Bank Buying Rate (BBR) and Bank Selling Rate (BSR) mean.
ASSESSMENT TASKS OR ACTIVITIES	
Worksheet with a. Spaces to research and complete the following: - Current annual travel allowance - What is travel allowance in this sense? - Omnibus allowance - Various legitimate ways of taking money to other countries (check against range) - Time limits for buying and selling forex - Meaning of the terms ROE, BSR, BBR b. Columns for describing advantages and disadvantages - Research and report back (oral, with demonstration, if only in simulated role play) - Research and report back on aspects such as money cards, overseas ATM's, electronic transfers, etc.	

SUBJECT OUTCOME	
1.2 Convert ZAR to foreign currency.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Sources for finding appropriate foreign currency conversion information are accessed.	Access sources providing information regarding the appropriate foreign currency used by specific countries.
Appropriate foreign currency for specific countries can be determined.	Given specific countries, identify the appropriate foreign currency used.
The two types of exchange rate tables are differentiated and understood	Explain the two different ways of presenting exchange rate tables (i.e. as used by a bank and by a foreign exchange bureau).
ZAR is converted to foreign currency using the applicable Bank Exchange Rate table.	Convert ZAR to foreign currency using the applicable Bank Exchange Rate table.

Foreign currency is converted to ZAR using the applicable Bank Exchange Rate table.	Convert foreign currency to ZAR using the applicable Bank Exchange Rate table.
ASSESSMENT TASKS OR ACTIVITIES	
- Investigate sources providing information related to foreign currency use for particular countries, and report back - Provide written exercise allowing students to access and use one of the above sources to determine the answers. - Obtain copies of both formats for presentation of exchange rate tables, and explain the difference in own words. - Worksheet with elementary calculations.	

Topic 2: The itinerary

SUBJECT OUTCOME	
2.1 Describe, research and draw up logical and detailed itineraries for both a personal as well as a general tour.	
ASSESSMENT STANDARD	LEARNING OUTCOME
General and personal itineraries with reference to format are explained and distinguished from one another.	Explain how to distinguish between general and personal itineraries with reference to format.
Various tours (from the suggested range) are described and they can be distinguished from one another.	Describe various tours and distinguish them from each another. <i>Range: Inclusive Tour (IT), Group Inclusive Tour (GIT), Foreign Independent Tour (FIT), Scheduled and Guaranteed Departure Tours, Fly-Drive, Fly-Cruise, Tailor-made Tours, Special Interest Tours, Adventure Tours, Cruises.</i>
Places of interest, festivals in specific regions and country gateways are identified.	Explain how to identify places of interest, festivals in specific regions and country gateways.
Sightseeing tours are sourced and incorporated into the itinerary in a practical and logical format.	Source sightseeing tours and incorporate them into the itinerary using a practical and logical format.
Customer information is gathered and the necessary details are taken into account when developing the information.	Explain how to source customer information and take details into account when developing the information. <i>Range: Customer information and details, number of travellers, special requests.</i>
The itinerary is further developed, taking into account climatic, seasonal and political information of the destination.	Explain how to develop the itinerary taking into account climatic, seasonal and political information of the destination.
How to source names, addresses and telephone numbers of hotels and local wholesalers are explained and are incorporated in the itinerary.	Explain how to source names, addresses and telephone numbers of hotels and local wholesalers and incorporate them in the itinerary.
How to source land arrangements and transport included in the tour is explained.	Explain how to source land arrangements and transport requirements to be included in the tour. <i>Range: Land arrangements: accommodation, meals.</i>
The itinerary is created in a logical order, with realistic allocation of the distances and times travelled (sufficient time for leisure, activities and travelling has been allowed).	Explain how to compile the itinerary in a logical order, ensuring that the distances and times travelled are realistic (sufficient time for leisure, activities and travelling is allowed).
How to include attractions and activities, and can give relevant descriptions are explained.	Explain how to include attractions and activities with relevant descriptions.
General information pertaining to transfers, accommodation, meals, portage, tips, re-confirmations, check-in/check-out times applicable to the specific itinerary, have been included.	Explain how to include general information pertaining to transfers, accommodation, meals, portage, tips, re-confirmations, and check-in/check-out times applicable to the specific itinerary.

ASSESSMENT TASKS OR ACTIVITIES
- Formulate definitions to distinguish between the two types of itineraries. - Develop an example for each of the two types of itinerary as the tasks mentioned below are carried out. Keep all the research (rough drafts) as examples of progress and logical process selection or thought. - Project: Collect media advertisements and/or brochures and/or published itineraries on each tour type mentioned in the range. - Assignment: given a particular region, student researches places of interest, festivals and gateways, both for a tourist from another part of the country as well as tourists from neighbouring/overseas countries, for a four day stay. (For the personal itinerary, provide student with a client profile). - Investigate available sightseeing tours for particular region/area, aiming to incorporate at least two in each type of itinerary. - Role play sourcing customer information, then include completed client file as evidence for PoE. Case studies can be given to use in role playing. - Find local/ regional/ international examples of destinations where climate, seasons and political unrest could influence a tour. Group discussion as to alternative decisions. - Compile list of potential hotels and wholesalers pertaining to the tour and investigate ways to source the contact details (document filed in PoE). - Plan the time frame for the itinerary. Use examples of itineraries to compile own, using the information collected thus far.

SUBJECT OUTCOME	
2.2 Demonstrate ability to make decisions on a customer service or product and adapt it accordingly if necessary.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Needs and preferences of the customer(s) have been identified and a suitable alternative service or product has been suggested.	Identify needs and preferences of the customer(s) and offer a suitable service or product. The offer must suit the customers; otherwise decide what alternative offer to make.
ASSESSMENT TASKS OR ACTIVITIES	
Case study of a tailor-made tour that does not suit the client profile in all ways. Alternative arrangements must be suggested.	

SUBJECT OUTCOME	
2.3 Demonstrate ability to adapt to changes in an itinerary and perform changes as smoothly as possible.	
ASSESSMENT STANDARD	LEARNING OUTCOME
A scheduled change is handled or a change in the customer's itinerary and this change is incorporated with as few disruptions as possible to the original itinerary.	Given a scheduled change or a change in the customer's itinerary, incorporate this with as few disruptions as possible to the original itinerary.
Ways of adjusting a ticket/reservation in cases of natural disasters or sudden political instability are explained and reasons provided for the action(s) taken.	- Given natural disasters or political instability within a specific region, explain how a ticket or reservation could be adjusted. - Give reasons for action taken.
ASSESSMENT TASKS OR ACTIVITIES	
- Case study of a tailor-made tour with need(s) for change. Adjustment(s) must be suggested. - Whole topic can be assessed with an open book test during which a complete three-day tour itinerary must be planned from scratch.	

Topic 3: Excursions and tours

SUBJECT OUTCOME	
3.1 Research and design a tour framework.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Existing publications on the selected area and locations have been used to research and design a tour framework.	Make use of existing publications (articles, books, brochures, etc) on the selected area and locations.
Local oral history and traditions were brought into the picture.	Make use (where relevant) of local oral history and traditions.
The tour framework has been selected according to Topic, duration, correct price level, interests and physical limitations of target client group, and also to the benefit of a specific community or communities.	Scope a tour framework according to interests and physical limitations of target client group, topic, durations, price level and benefit to the specific community or communities.
A ten day tour is planned to visit a number of sites and includes a route map transport-, accommodation-, meal- and refreshment arrangements.	Plan a ten day tour to visit a number of sites. Include a route map, transport, accommodation, meals, refreshments, etc.
ASSESSMENT TASKS OR ACTIVITIES	
- Compile in the form of a reference list that normally appears at the end of a written research project. - Decide on a suitable excursion, research the necessary local oral history and/or traditions. This could constitute a tour framework for all the Subject Outcomes of this Topic. - Case study with client profile(s) to match the chosen excursion. - Construct and present the framework of the day plan in terms of all the various aspects mentioned.	

SUBJECT OUTCOME	
3.2 Identify and select specific sites, attractions, activities and service providers.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Suitable tour sites were selected.	Select sites appropriate to the scope of the tour.
- Research on each site was carried out, using appropriate literature, local oral history and traditions, as well as in-depth published material. - A competent talk is planned and delivered and questions are answered.	Conduct research on each site, using appropriate brochures and publicity material, relevant local oral history and traditions, as well as more in-depth published material; sufficient to be able to plan and deliver a competent and interpretive talk and answer questions.
The site in the context of a wider South African history and/or cultural traditions is discussed.	Discuss the site in the context of wider South African history and/or cultural traditions.
ASSESSMENT TASKS OR ACTIVITIES	
Project: Various sites mentioned in the above framework are researched in detail and an oral presentation is given. Relate the oral feed-back to South African history and cultural traditions.	

SUBJECT OUTCOME	
3.3 Package an appropriate tour. <i>Range: A full day excursion.</i>	
ASSESSMENT STANDARD	LEARNING OUTCOME
Tour route, time schedule, transport and itinerary have all been planned.	Plan a route, time schedule, means of transport and itinerary for the tour.
A basic cost framework was drafted and completed.	Draft and complete a basic cost framework for the tour.
Restaurants, activities and service providers were selected and reservations were made, where necessary.	Select and, where required, book restaurant(s), activities and service providers.
Specific sites were discussed.	Provide commentary on specific sites.
A written and printed day by day itinerary for a ten day tour is designed visiting three South African provinces, starting in your own province.	Produce a written and printed day by day itinerary for a ten day tour, visiting three South African provinces, starting in your own province.
ASSESSMENT TASKS OR ACTIVITIES	
- Use the Topic tour framework and continue developing it to these Learning Outcomes - Project: engage the assistance of a local guide who will use the completed planning to conduct an excursion, possibly of a small peer group.	

SUBJECT OUTCOME	
3.4 Carry out evaluation procedures on tours and adapt accordingly.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Feedback was collected from guides who conducted the tour.	Gather feedback from guides who have conducted the tour.
Guide- and customer questionnaires were compiled and evaluated.	Design and evaluate guide and other questionnaires and evaluation checklists.
ASSESSMENT TASKS OR ACTIVITIES	
Use the above exercise to complete these Learning Outcomes (with possibly making use of a worksheet first, providing guidance towards ideal forms of feedback questionnaires and evaluation checklists)	

SUBJECT OUTCOME	
3.5 Describe, list and calculate different costing elements applicable to excursions and tours.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Fixed costs are determined and the difference between fixed and variable costs is explained.	Identify fixed costs and distinguish from variable costs.
Costs excluded from the tour price are identified.	Identify costs excluded from the tour price.
A checklist of standard tour cost elements has been created.	Compile a checklist of cost elements that should be included in every tour.
The difference between commission, overrides and mark-ups is described.	Distinguish commission from overrides and mark-ups.
Commission, overrides and mark-ups are calculated.	Calculate commission, overrides and mark-ups.
Computerised quoting systems currently available are described and how they are used is explained.	Describe computerized quoting systems currently available and explain how they are used.
ASSESSMENT TASKS OR ACTIVITIES	
- Plan and cost a tour lasting for several days and visiting two or three different destinations - The whole project must happen after various single outcomes have been examined, discussed and activities have been given to ensure that students have grasped the context (the above Learning Outcomes in particular).	

SUBJECT OUTCOME	
3.6 Demonstrate the ability to do final cost calculations on local tours and excursions, decide about changes and act accordingly.	
ASSESSMENT STANDARD	LEARNING OUTCOME
The cost of a local tour is calculated, including accommodation; transport; guide and escort fees; entry fees; levies and taxes; meals; portage; promotional items; service fees; insurance; side-tours and activities; guide accommodation and meals; equipment hire.	Calculate the cost of a local tour taking the following tour elements into account: accommodation; transport; guide and escort fees; entry fees; levies and taxes; meals; portage; promotional items such as bags, wallets, pillow gifts; service fees; insurance; side-tours and activities; guide accommodation and meals; equipment hire.
The tour price per person is calculated, using net rates, commissions, mark-ups and/or overrides.	Calculate the tour price per person, using net rates, commissions, mark-ups and/or overrides.
The final tour price is evaluated and in the event that the tour price is considered too high, potential cost reductions are suggested.	Evaluate and analyse the final tour price and in the event that the tour price is considered too high, suggest potential cost reductions.
Conditions contained in contracts are analysed and comparisons are made between them.	Analyse the conditions contained in contracts and draw comparisons between them.
ASSESSMENT TASKS OR ACTIVITIES	
Assignment, which can be based on a case study with leading questions	

SUBJECT OUTCOME	
3.7 Demonstrate ability to respond to unforeseen actions and circumstances during tour and excursion planning and adapt performance accordingly.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Given currency fluctuations, describe ways of reducing the financial loss.	Using an elementary inbound tour costing example, and given currency fluctuations, describe ways of reducing the financial loss.
Given an increase in rates from a principal, a decision can be made whether to incorporate the costs into the tour, or to use a new supplier and reasons for the decision can be motivated.	Given an increase in rates from a principal, decide whether to incorporate the costs into the tour, or to use a new supplier and explain reasons for the decision.
Given a situation where an error has occurred, a solution to the problem is found.	Given a situation where an error has occurred, recommend a way to solve the problem.

SUBJECT OUTCOME	
3.8 Research, design and plan a tour, taking into consideration need, demand, macro and micro environment.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Given a defined need, destinations to be included in the itinerary of an inbound tour are selected, taking the profile of the target market into consideration.	Given a defined need, select destinations to be included in the itinerary of an inbound tour, taking into consideration the profile of the target market (Note: student can start with fairly basic tour plans for visitors from another part of the country; then move on to a more involved tour for visitors from overseas who want to experience at least two contrasting destinations in South Africa).
Appropriate research aids that can be employed to establish gateways, available transport, accommodation, available sightseeing tours, and dates of events, climatic conditions and political situation of the destination are identified.	Identify appropriate research aids that can be employed to establish gateways, available transport, accommodation, available sightseeing tours, dates of events, climatic conditions and political situation of the destination(s)
Tour components have been matched to the target market, according to the suggested range.	Select the tour components to match the target market. <i>Range: Transport, transfers, accommodation, meals, sightseeing trips, shopping expeditions, special interest activities and leisure time.</i>
Points regarding tour components to be taken into consideration when planning group tours are explained.	Explain points regarding tour components to be taken into consideration when planning group tours.
Program of daily activities that match the profile of the target market is described, taking days of arrival/departure and travelling time into account.	Describe the program of daily activities that match the profile of the target market, taking days of arrival/departure and travelling time into account.
Legal liabilities of the supplier, tour operator, retail agent and customer are described and additional travel insurance cover is recommended.	Describe the legal liabilities of the supplier, tour operator, retail agent and customer and recommend additional travel insurance cover.
Project plan to determine the lead time required for certain aspects is drafted: <i>Range: Negotiation with suppliers; booking reservations; ticketing time limits; design and preparation of brochure material; meetings with appropriate sub-sectors and role players.</i>	Draft a project plan to determine the lead time required for the following: negotiation with suppliers; booking reservations; ticketing time limits; design and preparation of brochure material; meetings with appropriate sub-sectors and role players.
SUBJECT OUTCOME	
3.9 Demonstrate ability to make decisions about additional practices and services to tour packages and act accordingly.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Special tour components that could be included are identified.	Identify special tour components that could be included, e.g. pillow-gifts, meet-and-greet, complimentary drinks, farewell meal at the end of the tour guides, portage and tips, aircraft head covers with logos, travel bags.
Given a request to include breakaway trips from the original itinerary, additional services are offered and incorporated in the tour plan.	Given a request to include breakaway trips from the original itinerary, offer additional services and incorporate these in the tour plan.

SUBJECT OUTCOME	
3.10 Demonstrate ability to adapt to unforeseen changes in excursions and tours and perform changes.	
ASSESSMENT STANDARD	LEARNING OUTCOME
Given natural disasters or political instability within a specific region, changes to the package are suggested and reasons for the changes are explained.	Given natural disasters or political instability within a specific region, suggest changes to the package and explain reasons for the changes.
Given that there are fewer participants than the minimum group size, alternative arrangements that can be made are described and reasons for the decision are given.	Given that there are fewer participants than the minimum group size, describe alternative arrangements that can be made and give reasons for the decision.
ASSESSMENT TASKS OR ACTIVITIES	
- Case studies or short projects in which the various aspects of Learning Outcomes above are exercised and assessed. Alternatively they can be incorporated in the tour plan devised in the earlier outcomes. - Another way of assessing would be to give a final, more advanced project (a tour to be planned, costed, etc.) in which the instructions are posed in such a way that Learning Outcomes in SO 3.9 are featured as possible stumbling blocks which need to be addressed whilst planning the tour package.	

4 SPECIFICATIONS FOR EXTERNAL ASSESSMENT IN TOURISM OPERATIONS - LEVEL 4

4.1 Integrated Summative Assessment Task (ISAT)

A compulsory component of the ESASS is the **Integrated Summative Assessment Task (ISAT)**, which is a major assessment task that draws on the student's cumulative learning achieved throughout the full year. The task requires **integrated application of competence** and is executed and recorded in compliance with assessment conditions.

Two possible approaches to the ISAT may be applied as follows:

- The students could be assigned a task at the beginning of the year which they will have to complete in various phases in the year to obtain part assessment. The final assessment is made at the end of the year upon completion of the task

OR

- The other option is that students will have achieved the competencies through the year but the competencies will be assessed cumulatively in a single assessment/exam session at the end of the year

The ISAT will be set by the externally appointed examiner and be conveyed to colleges within the first quarter of the year

The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.

4.2 National examination

A national examination is conducted in annually October or November by means of a paper set externally and marked and moderated externally. The following distribution of cognitive application is suggested.

LEVEL 4	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
	30%	35%	35%