



education

Department:
Education
REPUBLIC OF SOUTH AFRICA

NATIONAL CERTIFICATE (VOCATIONAL)

SUBJECT GUIDELINES

Tourism Operations NQF Level 4

Spetember 2007

TOURISM OPERATIONS – LEVEL 4

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INTRODUCTION

A. What is Tourism Operations?

Tourism Operations deals with a variety of aspects vital for the effective functioning of a frontline tourism position (Level 2). In a modern tourism office environment the student must know how to use the office equipment, maintain an information system and, especially when providing customer information and processing reservations, how to hold a professional telephone conversation.

At Level 3, the subject introduces the student to the principles of entrepreneurship and marketing, followed by the development of a business plan for establishing a small tourism business. This should empower the student to seek self-employment in the present economic climate in South Africa.

At Level 4, the student works with itineraries, tour packages, costing and the planning and conducting of a tour, all which will enable him or her to assist inbound tourists with practical advice, local travel plans and relevant bookings. At this level, the student starts dealing with various aspects of international travel, which should include knowledge about foreign currencies, basic forex conversions and the legal process of taking money out of the country.

B. Why is Tourism Operations important in the Tourism programme?

Tourism Operations touches on vital issues such as confidentiality, professional office conduct and the importance of providing correct information. Moreover, it shows the student how to combine entrepreneurial and marketing skills with tour operating knowledge, which can be applied to local tourists and inbound travellers. The focus is on the practicalities of starting a new tourism business venture and the use of marketing resources. There is a growing realisation that a larger slice of the South African population should become involved in and benefit from the Tourism industry. Therefore, this subject is very important to the Tourism programme because it enables students to combine their Tourism knowledge with entrepreneurial and marketing skills in order to plan a career or to create self-employment in the Tourism industry.

C. The link between the Tourism Operations Learning Outcomes and the Critical and Developmental Outcomes

In Tourism Operations, students should be able to:

- Use modern technology effectively and critically towards faster and more accurate tourism administration, always showing responsibility towards the environment and the health of others in the spirit of conservation.
- Develop entrepreneurial opportunities such as starting up tourism SMMEs by examining marketing principles and entrepreneurial skills and by developing business plans.
- Accurately perform foreign exchange transactions and conversions.
- Plan an itinerary to meet the needs of specific tourists.
- Organise and manage themselves and their activities responsibly and effectively to use sound business and marketing skills and to combine these with the basics of Science of Tourism in order to work successfully towards a tourism industry where service excellence is the main object.

D. Factors that contribute to achieving the Tourism Operations Learning Outcomes

The student must show a penchant for orderly, systematic work. He or she must have problem-solving skills and keen powers of observation. Good communication skills are essential. Students who have a business sense and an interest in modern technology will have an advantage.

1 DURATION AND TUITION TIME

This is a one year instructional programme comprising 200 teaching and learning hours. The subject may be offered on a part-time basis provided all of the assessment requirements set out hereunder are adhered to.

Students with special education needs (LSEN) must be catered for in a way that eliminates the barriers to learning.

2 SUBJECT LEVEL FOCUS

- Discuss different ways of taking along money for international travel purposes
- Calculate basic forex conversions
- Compose and present a general and/or personal itinerary
- Calculate the cost of wholesale travel packages and compare various contracts
- Research, design, plan and improve a guiding experience within a specific tourist area
- Plan a tour, taking into consideration need, demand, macro- and micro environment

3 ASSESSMENT REQUIREMENTS

3.1 Internal assessment (50 percent)

All internal assessments must be finalised by an assessor with at least a certificate of competence.

3.1.1 Theoretical Component

The theoretical component will form 60 percent of internal assessment.

Internal assessment of the theoretical component of Tourism Operations NQF Level 4 will take the form of observation, class questions, group work, (informal group competitions with rewards), individual discussions with students, class, topic and semester tests and internal examinations. Daily observation can be made when marking exercises of the previous day and class questions.

Assignments, case studies and tests can be done at the end of a topic. Tests and internal examinations must form part of internal assessment.

Any or all of the written tasks/feedback can be considered as evidence of competency in the theoretical component and be filed as such in a Portfolio of Evidence (PoE).

3.1.2 Practical/Application Component

Practical components include applications and exercises. All practical components must be indicated in a PoE.

The practical component will form 40 percent of internal assessment.

Internal assessment of the practical component of Tourism Operations NQF Level 4 will take the form of assignments, practical exercises, case studies and practical examination in a simulated business environment.

Students may complete practical exercises on a daily basis. Assignments and case studies can be done at the end of a topic. Practical examination can form part of internal practical assessment.

• **Some examples of practical assessments include, but are not limited to:**

- Presentations (lectures, demonstrations, group discussions and activities, practical work, observation, role play, independent activity, synthesis and evaluation)
- Use of office equipment and travel aids
- Exhibitions by students
- Visits undertaken by students based on a structured assignment task
- Research
- Developing promotional literature, e.g. brochures
- Task performance in a simulated/structured environment

- **Definition of the term “Structured Environment”**

“Structured environment” for the purposes of assessment refers to an actual or simulated workplace, or workshop environment. It is advised that a practicum room is available on each campus (where applicable) for practical assessment.

- **Evidence in practical/application assessments**

All evidence pertaining to evaluation of practical work must be reflected in the student’s PoE. The tools and instruments constructed and used for the purpose of conducting such assessments must be clear from the evidence contained in the PoE.

- **Job shadow or industry practicum**

Evidence of job shadowing or of actual practical work in the tourism industry must be provided in the form of a logbook. The following information should be contained in the logbook:

- Cover page – details of student and workplace;
- Key functions to be observed (job shadowing) or
- Competencies to be demonstrated (industry practicum);
- Time period of job shadow/practicum, with relevant dates;
- Daily signature of supervisor and of student;
- Evaluation/comment of supervisor, including
- Recommendations for improvement.

For the logbook to be regarded as valid evidence it must be signed off by the officially assigned supervisor.

3.1.3 Processing of internal assessment mark for the year

A year mark out of 100 is calculated by adding the marks of the theoretical component and the practical component of the internal continuous assessment.

3.1.4 Moderation of internal assessment mark

Internal assessment is subject to both the internal and external moderation procedures as contained in the *National Examinations Policy for FET College Programmes*.

3.2 External assessment (50 percent)

A national examination. is conducted annually in October or November by means of a paper set, marked and moderated externally.

Details in respect of external assessment are contained in the *Assessment Guidelines: Tourism Operations* (Level 4).

4 WEIGHTED VALUES OF TOPICS

TOPICS	WEIGHTED VALUE
1. Basic foreign exchange transactions and conversions	25
2. The itinerary	25
3. Excursions and tours	50
TOTAL	100

5 CALCULATION OF FINAL MARK

Internal assessment: Student’s mark/100 x 50 = a mark out of 50 (a)

Examination mark: Student’s mark/100 x 50 = a mark out of 50 (b)

Final mark: (a) + (b) = a mark out of 100

All marks are systematically processed and accurately recorded to be available as hard copy evidence for, amongst others, purposes of moderation and verification, as well as purposes of reporting.

6 PASS REQUIREMENTS

The student must obtain at least fifty (50) percent in ICASS and fifty percent (50) in the examination.

7 SUBJECT AND LEARNING OUTCOMES

On completion of Tourism Operations Level 3, the student should have covered the following topics:

Topic 1:	Basic foreign exchange transactions and conversions
Topic 2:	The itinerary
Topic 3:	Excursions and tours

7.1 Topic 1: Basic foreign exchange transactions and conversions

7.1.1 Subject Outcome 1: Demonstrate basic knowledge about foreign exchange.

Learning Outcomes:

- State the current annual SA travel allowance for adults and children.
- Describe what this travel allowance is and how it applies throughout one calendar year.
- Briefly explain omnibus allowance available for companies and for frequent overseas business travel.
- List the various ways of taking forex out of the country
Range: Electronic transfers, telegraphic transfers, bank drafts, traveller's cheques, cash, cash cards.
- Describe the advantages and disadvantages of each method.
- Explain how the system of traveler's cheques works.
- Describe how a customer can access funds in other countries.
- Explain the time limits regarding the purchasing and selling of forex.
- Explain what the terms Rate of Exchange (ROE), Bank Buying Rate (BBR) and Bank Selling Rate (BSR) mean.

7.1.2 Subject Outcome 2: Convert ZAR to foreign currency.

Learning Outcomes:

- Access sources where the appropriate foreign currency used by specific countries can be determined.
- Given specific countries, identify the appropriate foreign currency used.
- Explain the two different ways of presenting exchange rate tables (i.e. as used by a bank and by a foreign exchange bureau).
- Convert ZAR to foreign currency using the applicable Bank Exchange Rate table.
- Convert foreign currency to ZAR using the applicable Bank Exchange Rate table.

7.2 Topic 2: The itinerary

7.2.1 Subject Outcome 1: Describe, research and draw up logical and detailed itineraries for both a personal as well as a general tour.

Learning Outcomes

- Explain how to distinguish between general and personal itineraries with reference to format.
- Describe various tours and distinguish them from each another.
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.
- Explain how to identify places of interest and festivals in specific regions and country gateways.
- Source sightseeing tours and incorporate them into the itinerary, using a practical and logical format
- Explain how to source customer information and take details into account when developing the information.
Range: Customer information and details: number of travelers, special requests.
- Explain how to develop the itinerary taking into account climatic, seasonal and political information of the destination.
- Explain how to source names, addresses and telephone numbers of hotels and local wholesalers and incorporate them in the itinerary.
- Explain how to source land arrangements and transport requirements to be included in the tour.

Range: Land arrangements: accommodation, meals.

- Explain how to compile the itinerary in a logical order, ensuring that the distances and times traveled are realistic (sufficient time for leisure, activities and travelling is allowed).
- Explain how to include attractions and activities with relevant descriptions.
- 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.

7.2.2 Subject Outcome 2: Demonstrate ability to make decisions on a customer service or product and adapt it accordingly if necessary.

Learning Outcome:

- 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.

7.2.3 Subject Outcome 3: Demonstrate ability to adapt to changes in an itinerary and perform changes as smoothly as possible.

Learning Outcomes:

- Given a scheduled change or a change in the customer's itinerary, incorporate this with as few disruptions as possible to the original itinerary.
- Given natural disasters or political instability within a specific region, explain how a ticket or reservation could be adjusted.
- Give reasons for action taken.

7.3 Topic 3: Excursions and Tours

7.3.1 Subject Outcome 1: Research and design a tour framework.

Learning Outcomes:

- Make use of existing publications (articles, books, brochures etc) on the selected area and locations.
- Make use (where relevant) of local oral history and traditions.
- Scope a tour framework according to interests and physical limitations of target client group, topic, durations, price level and benefit to the specific community/ies.
- Plan a ten day tour to visit a number of sites. Include a route map, transport, accommodation, meals, refreshments, etc.

7.3.2 Subject Outcome 2: Identify and select specific sites, attractions, activities and service providers.

Learning Outcomes:

- Select sites appropriate to the scope of the tour.
- 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.
- Discuss the site in the context of wider South African history and cultural traditions.

7.3.3 Subject Outcome 3: Package an appropriate tour.

Range: A full day excursion.

Learning Outcomes:

- Plan a route, time schedule, means of transport and itinerary for the tour.
- Draft and complete a basic cost framework for the tour.
- Select and, where required, book restaurant(s), activities and service providers.
- Provide commentary on specific sites.
- Produce a written and printed day by day itinerary for a ten day tour, visiting three South African provinces, starting in your own province.

7.3.4 Subject Outcome 4: Carry out evaluation procedures on tours and adapt accordingly.

Learning Outcomes:

- Gather feedback from guides who have conducted the tour.
- Design and evaluate guide and other questionnaires and evaluation checklists.

7.3.5 Subject Outcome 5: Describe, list and calculate different costing elements applicable to excursions and tours.

Learning Outcomes:

- Identify fixed costs and distinguish from variable costs.
- Identify costs excluded from the tour price.
- Compile a checklist of cost elements that should be included in every tour.
- Distinguish commission from overrides and mark-ups.
- Calculate commission, overrides and mark-ups.
- Describe computerized quoting systems currently available and explain how they are used.

7.3.6 Subject Outcome 6: Demonstrate the ability to do final cost calculations on local tours and excursions, decide about changes and act accordingly.

Learning Outcomes:

- 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.
- Calculate the tour price per person, using net rates, commissions, mark-ups and/or overrides.
- Evaluate and analyse the final tour price and in the event that the tour price is considered too high, suggest potential cost reductions.
- Analyse the conditions contained in contracts and draw comparisons between them.

7.3.7 Subject Outcome 7: Demonstrate ability to respond to unforeseen actions and circumstances during tour and excursion planning and adapt performance accordingly.

Learning Outcomes:

- 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, 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, recommend a way to solve the problem.

7.3.8 Subject Outcome 8: Research, design and plan a tour, taking into consideration need, demand, macro and micro environment.

Learning Outcomes:

- 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).
- Identify 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.
- Select the tour components to match the target market.
Range: Transport, transfers, accommodation, meals, sightseeing trips, shopping expeditions, special interest activities and leisure time.
- Explain points regarding tour components to be taken into consideration when planning group tours.
- Describe the program of daily activities that match the profile of the target market, taking days of arrival/departure and travelling time into account.
- Describe the legal liabilities of the supplier, tour operator, retail agent and customer and recommend additional travel insurance cover.

- 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.

7.3.9 Subject Outcome 9: Demonstrate ability to make decisions about additional practices and services to tour packages and act accordingly.

Learning Outcomes:

- 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, portorage and tips, aircraft head covers with logos, travel bags.
- Given a request to include breakaway trips from the original itinerary, offer additional services and incorporate these in the tour plan.

7.3.10 Subject Outcome 10: Demonstrate ability to adapt to unforeseen changes in excursions and tours and perform changes.

Learning Outcomes:

- 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, describe alternative arrangements that can be made and give reasons for the decision.

8 RESOURCE NEEDS FOR THE TEACHING OF TOURISM OPERATIONS LEVEL 4

(Recommended per group of 15 – 20 students)

8.1 Physical resources

The following teaching aids should be made available, if possible:

- **Practicum room or simulator**

- A practical room (e.g. a front office, or a tourism information centre, etc.) which is a simulated tourism office environment, equipped with the basic office furniture and equipment, as well as the necessary electronic equipment, e.g. computer(s), printer, telephones, fax machines, photocopier, etc.
- Two-hole punch and stapler, ideally per workstation
- Filing cabinet
- Brochure stand(s)
- Counter top/workstation/reception counter as applicable
- Display boards
- The latest developments in electronic equipment must be available
- The computer(s) must be equipped with internet connection to enable website browsing for research purposes, as well as software training programmes, e.g. for making reservations
- At least one computer (with colour printer and connected to the Internet) equipped with a DVD-writer for presentations
- Storeroom facility for PoEs, ideally directly connected to the simulator venue for easy access.

- **Classroom**

- Classroom/lecture venues for use of Tourism students, where the tourism industry 'feel' can be created by means of maps, posters, wall decorations, industry magazines, etc.
- TV monitor and DVD/VCR
- DSTV satellite dish and decoder with connection (for Travel Channel, National Geographic etc.)
- Computer and data projector and screen
- Flash disk for facilitator to store information
- Presentation programme on computer to be used by facilitator to provide students with visual information on learning outcomes
- Digital video camera (with necessary connections and memory cards)
- Wall clocks (minimum 5) on which to explain time zones/world times

- Larger-than-usual desks/tables, since Tourism students work with documents, maps, atlases, reference books etc.
 - Reference books (e.g. Lonely Planet, Rough Guide, World Travel Guide etc.)
 - Dictionaries
 - Wall maps (World; Africa Physical and Political; South Africa Physical and Political)
 - Atlases and globe
 - Overhead projector and pull down screen
 - Flipchart
 - White board and/or black board
 - Storeroom facility for maps and other teaching aids, consumables etc. The storeroom should ideally be situated adjacent to/near the Tourism class room(s) for easy access
 - Notice board(s) outside in the corridor(s)
- **Media/resource center** (recommended per group of 15 – 20 students)
 - A well-equipped media/resource centre
 - Availability of computers and printers for students to complete assignments/case studies and do additional research
 - Research software e.g. Encarta, etc.
 - Subject related magazines (e.g. Getaway, Travel News Weekly, Outdoors, etc.), daily newspapers and subject related reference books for research by facilitators and by students
 - Subject related DVDs/videos
 - Copies of applicable tourism legislation/Acts
 - Stock room to store

8.2 Human resources

- **Lecturers/facilitators**
 - Facilitators with a tertiary qualification (or qualification at NQF Level 7) in Travel and/or Tourism; or Hospitality, preferably with relevant industry experience
 - In cases where tourism industry experience is non-existent, it is strongly recommended that such a facilitator does some part-time work in the tourism industry, e.g. during college holiday periods, in order to gain practical work experience
 - It will be to the advantage of facilitators/lecturers if they have already been declared competent as assessors and/or moderators
 - Training in Outcomes Based Education.
 - Partnerships should be established with the industry to augment facilitation in certain specialized areas where the appointed FET facilitator/lecturer lacks the necessary expertise
 - Outsourcing for modules such as First Aid
 - Specific facilitator(s)/lecturer(s) trained to manage the simulator/practicum room activities
 - Fundamentals facilitator: Regarding the IT component of Life Orientation it is strongly recommended that the particular facilitator should adapt the learning material to address the needs of computer use in the tourism industry.
 - Full time technology and research manager (with knowledge of computers, website browsing, research and reference books)

8.3 Other resources

- Access in the computer classrooms (for each Tourism student) to a computer and printer and the Internet
- Iveco bus – 20 seater for educational excursions and projects

8.4 Consumables

- Learning material/text books
- Answer books, with examples which students must complete for practical assignments
- Basic calculator for each student
- Lever arch file for each student to serve as PoE
- Lever arch file for Practical Assessment Portfolio
- Subscription fees for internet, subject related magazines, newspapers, TV license
- Disks

- CDs
- Ink cartridges (black and colour)
- Transparencies and –pens
- Glossy paper
- Standard office stationery (pens, tippex, etc.)
- Plastic sleeves
- Dividers
- Relevant reservations registers and related tourism documents
- Logbooks