

OBE for FET

# Tourism Operations level 2 lecturer's guide

nc edition

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## Contents

<b>Introduction</b>	<b>10</b>
How to use this Lecturer's Guide	10
Using this Lecturer's Guide with the Student's Book	10
The new curriculum	11
The FET/NCS curriculum policy for Tourism Operations	12
Approach and teaching of Tourism Operations	25
Tourism Operations and the NCS principles	30
Planning for the Tourism Operations curriculum	32
<b>Assessment</b>	<b>37</b>
Introduction	37
Number and forms of assessment for Level 2 assessment programme	42
Day-by-day assessment: practical applications	43
Assessment in Tourism Operations	45
<b>Assessment tools (rubrics and checklists)</b>	<b>50</b>
<b>Chapters in the Student's Book</b>	<b>63</b>
Chapter 1: Tourism operations	63
Chapter 2: Managing information	70
Chapter 3: Using the telephone	85
Chapter 4: Product knowledge and reservations	94
Chapter 5: Process payments	115

### **Commonly used abbreviations and acronyms**

AG	Assessment Guideline
CCO	Critical Cross-field Outcomes
DoE	Department of Education
EMS	Economic and Management Sciences
FET	Further Education and Training
GET	General Education and Training
HET	Higher Education and Training
HIV/Aids	Human Immunodeficiency Virus/Acquired Immune Deficiency Syndrome
ICASS	Internal Continuous Assessment
IKS	Indigenous Knowledge Systems
LB	Student's Book
LO	Learning Outcome
LP	Learning Programme
LSEN	Students with Special Education Needs
LSM	Student Support Material
LTSM	Learning and teaching support materials
NC	National Certificate
NCS	National Curriculum Statement
NSC	National Senior Certificate
NQF	National Qualifications Framework
OBE	Outcomes-based Education
SAG	Subject Assessment Guideline
SO	Subject Outcome
TG	Lecturer's Guide

## Introduction

This series for the subject Tourism Operations offers a Lecturer's Guide and a Student's Book for Tourism for Level 2 in the Further Education and Training (FET) Colleges. The content of the Lecturer's Guide and Student's Book has been divided into five chapters, with each chapter dealing primarily with a particular theme and its Subject Outcome (SO). Learning Outcomes (LO) have also been integrated within Tourism Operations and across the other subjects.

### How to use this Lecturer's Guide

Every chapter in the Lecturer's Guide includes guidance and additional information as well as assessment opportunities.

The sections on **guidance and additional information** offer useful suggestions on how to present the learning material, how to prepare and how to conduct each activity. Ideas for individual, pair, group, class and Portfolio of Evidence activities have been designed to cover the LOs.

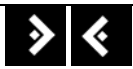








Possible **solutions** to questions in the Student's Book are also provided for most of the activities. Although you will find these suggestions useful when preparing a lesson, you can choose to adapt these methods or to use your own, since you know what will work best for your students. Additional information, intended to serve as background for the lecturer, is supplied for some of the activities.

**Assessment** should be continuous. At the end of each unit in the Student's Book, there is an opportunity for self-assessment by the students as well as an end of unit test. These formative assessment questions are directly linked to the LOs of each unit and could be used as part of tests and examinations. Where applicable, specific guidance is provided for **inclusive education** and LSEN.

In each unit in this Lecturer's Guide, guidance has been given regarding **assessment** for the activities in the Student's Book. Some **additional assessment** opportunities are also included. **Rubrics and checklists** have been prepared to assist you with assessment (see page xx). You can choose to use these assessment tools as they are, or adapt them to suit your specific needs. At the end of each chapter in this Lecturer's Guide, there is a grid summarising the assessment for each activity. This could be used or adapted for Portfolio of Evidence assessment purposes for each student.

### Using this Lecturer's Guide with the Student's Book

Icons have been used throughout the Student's Book to consolidate and facilitate the learning process, and to adopt an interactive approach between the student and the text. The icons indicate different types of activity – for example, a group or a question or feedback activity. The icons are also used to indicate what is being dealt with – for example: outcomes, assessment, career links or a cross reference to something else.

	<b>Cross reference</b> This icon shows forward or backward links or references to other sections in the book.
	<b>Outcomes</b> Outcomes appear in the outcomes table at the beginning of each unit. The students should achieve these unit outcomes, which are derived from the Subject Outcomes and the Learning Outcomes.
	<b>Individual</b> This icon indicates that students should work on their own.
	<b>Pair work</b> This icon indicates that the students should work in pairs.
	<b>Group work</b> This icon indicates that the students should work in groups. Groups of four or five students are usually ideal, but depend on the type of activity.
	<b>End of unit tests</b> This icon provides the student with opportunities for self-assessment and ensures that the learning process has taken place. Tests at the end of each unit form part of summative assessment and assist the students to reflect on what they have learnt.
	<b>Minds</b> This icon indicates knowledge outcomes that students should have acquired.
	<b>Hands</b> This icon shows skills-based outcomes or activities developed for students to apply knowledge (and values) that they have acquired.
	<b>Hearts</b> This icon shows values-based outcomes that assist the students to express or develop particular values (or attitudes) to the issues raised.

### The new curriculum

A process of transforming education and training to realise the aims of our democratic society and of the Constitution has been underway since 1994. As part of this process, the outcomes-based curriculum (OBE) was developed as one united curriculum for all school students in the General Education and Training (GET) and Further Education and Training (FET) bands.

The OBE curriculum was designed to be student-centred, integrated and holistic, relevant to students' lives and the needs of the country, and to promote critical and creative thinking.

### What has changed?

The table below outlines some of the changes and compares terms used in the pre-OBE and OBE stages.

Pre-OBE	OBE
---------	-----

<b>Old terms/phrases</b>	<b>New terms/phrases</b>
Core syllabus	Subject Guidelines
Scheme of work	A Learning Programme consists of three stages of planning: 1. Subject Framework (three-year plan or Band plan per Subject) 2. Work Schedule per level per subject 3. Lesson Plans
Aims/themes/topics	Subject Outcomes (SOs)
Objectives /content	Assessment Standards (ASs)
Lesson plan	Lesson plan or learning experience
Text books	Learning and Teaching Support Materials (LTSM) – includes various learning and teaching resources like CDs, videos, text books, etc.
Learning/syllabus is content-driven. Rote learning takes place.	Learning is outcomes-based. The curriculum is relevant, communicative, connected to real-life situations and provides for the development of knowledge, skills and values in an integrated way.
Traditional teaching methods may have included learning being textbook-driven.	Traditional teaching methods are enhanced through methods that require the students to be actively involved.
Lecturer-centred	Student-centred and lecturer plays a facilitator/mediator role.
Students' work is assessed by the lecturer	A variety of assessment methods are used (self-assessment, peer assessment, group assessment, lecturer assessment, etc.).
Test-based assessment	Observation, Test and Task-based assessment takes place.
Lecturer is responsible for learning – motivation depends on the personality of the lecturer.	Students take responsibility for their own learning – students are motivated by constant feedback and affirmation.

### **The FET/NC curriculum policy for Tourism Operations**

The FET/NC curriculum policy guidelines state the following:

### **Purpose of Tourism Operations**

This subject prepares the student for the world of work in general and for the execution of accounting functions specifically. The practical components of accounting have the further aim to increase the student's competence level in such a way that he or she can be productive in a post for which an accounting background is required.

A student with an interest in the field of tourism or hospitality will benefit by doing Tourism Operations. Furthermore, this subject forms part of the management function of any business and is essential for any student exploring management as a future career opportunity in a tourism enterprise.

This subject will ensure that students:

- develop the skill to plan before commencing any work
- develop the logical thought processes so that instead of relying upon set rules, they may be able to apply basic principles to new and unfamiliar situations
- develop a systematic approach to the solution of problems
- understand and adapt to the social environment by meaningfully interpreting accounting information, which they may apply to their future lives
- develop specific characteristic disciplines such as thoroughness, accuracy and orderliness
- are motivated, self-directed, reflective lifelong students who responsibly manage themselves and their activities while working towards their goals.

In addition to being able to secure formal employment, students need to be in a position to pursue sustainable entrepreneurial and self-employment career pathways. Tourism Operations also forms the foundation for further learning opportunities.

### **Scope**

Tourism Operations encompasses relevant and contemporary theory and competence essential for promoting excellence and contributing towards sustainable tourism enterprises. The student who completes this certificate will be prepared to work in the small business sector, the private or the public sector, applying elementary knowledge and skills of subjects. Skills such as decision-making, problem-solving, creative thinking, systems thinking and effective communication in a competitive and constantly changing environment are critical to this subject.

The subject revolves around:

<b>TOPICS</b>	<b>WEIGHTED VALUE</b>
1. The tourism industry	25
2. The nature of tourists	25
3. Tourism dynamics	25
4. Career opportunities in the tourism industry	25
Total	100

### **Subject Outcomes and Learning Outcomes**

Outcomes-based education calls for lifelong learning by demonstrating nine critical cross-field outcomes (CCOs).



Tourism Operations Level 2 has four topics linked to Subject Outcomes (SOs) together with corresponding Assessment Standards (ASs) and Learning Outcomes (LOs) that are derived from the CCOs and which describe the knowledge, understanding, skills and values that students should demonstrate and be able to do at the end in Tourism Operations for the National Certificate level 2 in the FET Colleges band.

### **8.1 Topic 1: Operate and maintain office equipment**

#### **Subject Outcome 1**

T1 SO1 Follow instructions to operate office equipment.

#### **Learning Outcomes**

- T1 SO1 LO1 •1 Identify equipment in own area of responsibility in terms of function.
- T1 SO1 LO2 •2 Understand instructions for operating equipment and follow them responsibly with due regard to safety.
- T1 SO1 LO3 •3 Identify common problems or faults that occur on a routine basis and solve them, following the manufacturer's instructions.
- T1 SO1 LO4 •4 Recognise persistent and non-routine problems/faults that require specialist technical skills and report them to the relevant authority

#### **Subject Outcome 2**

T1 SO2 Maintain equipment in a clean and working order.

#### **Learning Outcomes**

- T1 SO2 LO1 •5 Clean the equipment and keep in good repair in accordance with the manufacturer's instructions.
- T1 SO2 LO2 •6 Replace consumable items according to the procedures for the particular machine.
- T1 SO2 LO3 •7 Describe the dangers of working with electricity and apply safety precautions when cleaning equipment.
- T1 SO2 LO4 •8 Explain the risks or hazards associated with the use of equipment and the disposal of waste from the machines; discarded items are disposed of safely and appropriately.
- T1 SO2 LO5 •9 Describe the relevant legal requirements that apply to Regulations and Warranties for selected equipment

#### **Subject Outcome 3**

T1 SO3 Monitor and request equipment consumables.

#### **Learning Outcomes**

- T1 SO3 LO1 •10 Estimate the quantity of consumables needed for a specified period.
- T1 SO3 LO2 •11 Request the required consumables timeously in accordance with established procedure.
- T1 SO3 LO3 •12 Handle consumables correctly and store them securely in

	accordance with the requirements of the business.
T1 SO3 LO4	•13 Update the required records for consumables accurately.
	<b>Subject Outcome 4</b>
T1 SO4	Recognise and take steps to minimise risks to safety when operating equipment.
	<b>Learning Outcomes</b>
T1 SO4 LO1	•14 Organise the area around the equipment to minimise risk to self and others.
T1 SO4 LO2	•15 Correct existing or potential safety risks involving equipment within own working area.
T1 SO4 LO3	•16 Identify safety risks involving equipment outside own work area and report them to the appropriate authority.
T1 SO4 LO4	•17 Identify actions to be taken to deal with emergencies involving equipment, for a specific organisation.
T1 SO4 LO5	•18 Report emergencies involving equipment, in an agreed format and according to organisational procedure.
	<b>8.2 Topic 2: Manage and store information</b>
	<b>Subject Outcome 1</b>
T2 SO1	Explain why companies record and keep information.
	<b>Learning Outcomes</b>
T2 SO1 LO1	•19 Explain the reason for recording information with reference to an actual document used in a tourism business.
T2 SO1 LO2	•20 List five examples of the type of information contained in records in a tourism business.
T2 SO1 LO3	•21 Name three methods of creating records that use different types of technology.
T2 SO1 LO4	•22 Describe the purpose for which a record is used for three different roles in a tourism organisation.
	<b>Subject Outcome 2</b>
T2 SO2	Name and describe the type of records that are specific to a contract in a tourism business sector.
	<b>Learning Outcomes</b>
T2 SO2 LO1	•23 Identify a policy, agreement, contract and quotation as different types of records specific to the tourism business sector.
T2 SO2 LO2	•24 Explain the type of information contained in a contract, agreement or quotation with reference to a named document.
T2 SO2 LO3	•25 Describe the purpose of maintaining a record of contracts, agreements and quotations with reference to specific case studies.
T2 SO2 LO4	•26 Explain the importance of client-specific details with

- examples from the tourism sector.
- T2 SO2 LO5 •27 Explain the purpose of recording changes to contracts, agreements and quotations with reference to three different circumstances (all tourism related).

**Subject Outcome 3**

T2 SO3 Locate and provide records to users on request.

**Learning Outcomes**

- T2 SO3 LO1 •28 Use suitable paper – or electronic filing systems to locate the required record.
- T2 SO3 LO2 •29 Locate, access and retrieve requested data within agreed organisational service levels.
- T2 SO3 LO3 •30 List and explain the reasons why confidential records are given only to authorised people.
- T2 SO3 LO4 •31 Explain the implications of releasing information to unauthorised persons in terms of risk to the company.
- T2 SO3 LO5 •32 Make and provide a copy of the record as requested, note the request and compliance and return the original documents to the correct location.
- T2 SO3 LO6 •33 Maintain the confidentiality of records at all times and explain security procedures in simple terms.

**Subject Outcome 4**

T2 SO4 Maintain confidentiality of customer and company information.

**Learning Outcomes**

- T2 SO4 LO1 •34 Recognise violations of company procedures relating to the confidentiality of information and report them, following established procedures.
- T2 SO4 LO2 •35 Recognise information classified as confidential as such and disclose only to approved personnel.
- T2 SO4 LO3 •36 Describe and explain company and legal requirements and conform all outputs/inputs to the storage system to established procedures.
- T2 SO4 LO4 •37 Identify situations where colleagues do not comply with security and confidentiality procedures and report immediately to the appropriate authority.
- T2 SO4 LO5 •38 Carry out all work activities according to the code of conduct and within the requirements of an organisation's security procedures.

**Subject Outcome 5**

T2 SO5 Store information using an existing storage system.

**Learning Outcomes**

- T2 SO5 LO1 •39 Classify, sort and record paper-based documentation according to established requirements.
- T2 SO5 LO2 •40 Store information in the correct location and sequence and

- describe the serious effect that misfiled documentation has on an organisation.
- T2 SO5 LO3 •41 Store documents in a manner that ensures that they are undamaged, safe and accessible when required.
- T2 SO5 LO4 •42 Classify and cross-refer information accurately. Refer classification uncertainties to an appropriate authority.
- T2 SO5 LO5 •43 Describe the method of classification and cross-referencing in a familiar context, as well as the problems that result from unconventional classification and cross-referencing.
- T2 SO5 LO6 •44 Discuss the organisation's procedures for archiving in terms of being current, accurate and according to a prescribed format.
- T2 SO5 LO7 •45 Describe the implications for productivity when an item cannot be located.
- T2 SO5 LO8 •46 Source and gather filing documentation.
- T2 SO5 LO9 •47 Create electronic file and label according to requirements.
- T2 SO5 LO10 •48 File electronic documentation according to organisational requirements.
- T2 SO5 LO11 •49 Complete filing within organisational time frames and standards.
- T2 SO5 LO12 •50 Refer classification uncertainties to an appropriate authority.
- T2 SO5 LO13 •51 Classify, sort and store materials without damage, in a safe and secure manner.

#### **Subject Outcome 6**

T2 SO6 Retrieve information from an existing storage system.

#### **Learning Outcomes**

- T2 SO6 LO1 •52 Locate required information promptly, and obtain, copy and dispatch it to the correct person or location.
- T2 SO6 LO2 •53 Communicate delays in the supply of information and politely explain the reason for delay.
- T2 SO6 LO3 •54 Correctly record retrieved information in order to track all files.
- T2 SO6 LO4 •55 Identify missing or overdue items and follow correct procedures to locate them.

#### **Subject Outcome 7**

T2 SO7 Store valuable documentation and reference materials securely.

#### **Learning Outcomes**

- T2 SO7 LO1 •56 Describe the process for securing valuable items and for maintaining that security.
- T2 SO7 LO2 •57 Explain reasons for security procedures with examples of the effects of an organisation when there is a breach of

- security.
- T2 SO7 LO3 •58 Identify and correct security risks within own area of authority.
- T2 SO7 LO4 •59 Recognise violations of security and report them following the familiar and established procedures.

### 8.3 Topic 3: Use the telephone

#### Subject Outcome 1

T3 SO7 Process incoming and outgoing phone calls.

#### Learning Outcomes

- T3 SO7 LO1 •60 Describe non-disclosable information with reasons why it is classified as non-disclosable.
- T3 SO7 LO2 •61 Explain the importance of acknowledging callers and keeping them informed of reasons for delays.
- T3 SO7 LO3 •62 List various ways of finding telephone numbers.
- T3 SO7 LO4 •63 Explain the difference in answering one's own private telephone and the way the switchboard is answered in terms of assisting customers.
- T3 SO7 LO5 •64 Describe standard telephone etiquette on answering, transferring and making calls.
- T3 SO7 LO6 •65 Describe the use of body language in communicating with others while on call and the reason why it is important.
- T3 SO7 LO7 •66 Describe methods for dealing with abusive callers.
- T3 SO7 LO8 •67 Describe methods for dealing with emergency situations.
- T3 SO7 LO9 •68 Demonstrate how all necessary documentation and equipment (computers, writing material, notes, etc.) are prepared prior to making any outgoing calls.
- T3 SO7 LO10 •69 Given a telephonic request from a customer, decide whether to help or to transfer the call to another person in the organisation and explain why.
- T3 SO7 LO11 •70 Ask probing questions to find out the purpose of the call. Transfer the caller to another person who may be more able to assist.
- T3 SO7 LO12 •71 Take messages for others in the organisation, following the correct procedure.
- T3 SO7 LO13 •72 Given the nature of the call, decide whether to take a detailed message or to offer to have the customer called back.
- T3 SO7 LO14 •73 Deal politely with callers (incoming, transfers and outgoing calls) and in keeping with the organisation's image and standard telephone etiquette.
- T3 SO7 LO15 •74 Deal with calls quickly and politely, keeping other calls holding as little as possible.

- T3 SO7 LO16 •75 Given a specific situation, decide what information is disclosable or non-disclosable and explain why.
- T2 SO7 LO17 •76 Given that a new switchboard is being introduced into the organisation, suggest ways to learn the new system quickly and becoming competent.

#### **8.4 Topic 4: Product knowledge and reservations**

##### **Subject Outcome 1**

T4 SO1 Demonstrated knowledge and understanding about services and facilities regarding reservations.

##### **Learning Outcomes**

- T4 SO1 LO1 •77 Explain the importance of a good knowledge of services and facilities and how incorrect information would impact on cost and customer satisfaction.
- T4 SO1 LO2 •78 Describe the interrelationship between different sectors of the tourism and hospitality industries and how they relate to reservations.
- T4 SO1 LO3 •79 Explain the reasons for quickly and accurately dealing with customers making reservations.
- T4 SO1 LO4 •80 Explain a central reservations system and how this system would impact on performance in the reservations department.
- T4 SO1 LO5 •81 Describe ways of dealing with power failure and booking errors.

##### **Subject Outcome 2**

T4 SO2 Demonstrated ability to make reservations.

##### **Learning Outcomes**

- T4 SO2 LO1 •82 Use a manual and/or computerised reservation system in accordance with organisational procedures.
- T4 SO2 LO2 •83 Given a range of reservations and a range of customers, check availability of service, advise guests and suggest alternatives. (Range of reservations: phone, fax/mail, face to face, Internet.) (Range of customers: individual, group, VIP, conference delegates.)
- T4 SO2 LO3 •84 Explain why it is important to accurately answer inquiries regarding cost and other product features.
- T4 SO2 LO4 •85 Check customer history and use this information to assist in making the reservation.
- T4 SO2 LO5 •86 Make the reservation following the correct procedure and record customer and payment details accurately.
- T4 SO2 LO6 •87 Record special requests clearly and accurately and explain the importance (for the organisation) of doing this.
- T4 SO2 LO7 •88 File completed reservations correctly.

- T4 SO2 LO8 •89 Explain the reasons for accurately recording cancellations and amendments to reservations.
- T4 SO2 LO9 •90 Explain the importance of advising departments and colleagues of specific customer requirements.
- Subject Outcome 3**
- T4 SO3 Demonstrated ability to adapt performance when faced with problematic or unusual reservation circumstances.
- Learning Outcomes**
- T4 SO3 LO1 •91 Given a situation where the computer system has failed and no reservations are received from central reservations system, describe ways to solve the situation.
- T4 SO3 LO2 •92 In a different type of establishment (B&B/game lodge) where a manual system is used, describe how reservation requests are dealt with.
- Subject Outcome 4**
- T4 SO4 Demonstrated knowledge and understanding about providing information and booking additional services to guests.
- Learning Outcomes**
- T4 SO4 LO1 •93 Explain the importance of giving accurate information to guests who would like to book extra services.
- T4 SO4 LO2 •94 Explain how inaccurate information impacts on the company, the customer and the service provider.
- T4 SO4 LO3 •95 Explain the importance of good general knowledge in terms of helping a guest.
- T4 SO4 LO4 •96 Describe different sources of information and their uses.
- T4 SO4 LO5 •97 Describe different ways of contacting service providers.
- Subject Outcome 5**
- T4 SO5 Attend to customers in a professional manner.
- Learning Outcomes**
- T4 SO4 LO1 •98 Explain the importance of attending to customers with minimum delay and in a polite, friendly manner.
- T4 SO4 LO2 •99 Identify customers' needs correctly, given a range of inquiries. (Range of information: directions, travel information, local information, guest services, telephone numbers.)
- T4 SO4 LO3 •100 Use appropriate sources of information to provide customers with accurate information. (Range of sources: maps, timetables, directories, guides, organisations contacted by telephone.)
- T4 SO4 LO4 •101 Make bookings for external services following correct procedure and stress the importance of doing so promptly. (Range of external services: transport, restaurant reservations, items to be delivered from external

	organisations.)
T4 SO4 LO5	•102 Display customer information prominently and maintain constant supplies of information that is current.
T4 SO4 LO6	•103 Make decisions on how to deal with unexpected situations and give reasons for that choice of action. (Range of situations: special customer requests, rude/aggressive customers, tour fully booked, no booking found, cannot meet customer needs.)
	<b>Subject Outcome 6</b>
T4 SO4	Given a different type of establishment, describe ways of providing customer information and booking services.
	<b>Learning Outcome</b>
T4 SO4 LO1	•104 Provide external services and customer information. (Range of establishments: game lodge, B&B and five-star establishments.)
	<b>8.5 Topic 5: Process payments</b>
T5	Note: These outcomes must be assessed in the working environment or in a realistic working environment. They can be assessed by a combination of observation, simulation and questioning.
	•105 Observation to cover payment points, dealings with customers, preparation and usage of equipment and cashing up procedures at the end of a shift/handover. Range of payment points: tills or billing machines with cash drawers, speed points/manual card machines. Simulation supplemented by questioning to cover unexpected situations (range of shortage of change, supplies, till rolls, cash discrepancies).
	•106 Observation to cover the sales transaction
	<b>Subject Outcome 1</b>
T5 SO1	Explain the importance of having sufficient change available at all times.
	<b>Learning Outcome</b>
T5 SO1 LO1	•1 Discuss the importance of having sufficient change available at all times, and the impact on the customer of not doing this
	<b>Subject Outcome 2</b>
T5 SO2	Explain the importance of having only a limited amount of cash at a payment point.
	<b>Learning Outcome</b>
T5 SO2 LO1	•2 Discuss the importance of having only a limited amount of cash at a payment point at any given time.
	<b>Subject Outcome 3</b>



T5 SO3	Explain the reason for securing a payment point from unauthorised access. <b>Learning Outcome</b>
T5 SO3 LO1	•3 Discuss the reason for securing a payment point from unauthorised access, and the impact on the organisation of not doing this. <b>Subject Outcome 4</b>
T5 SO4	Describe types of unauthorised payments. <b>Learning Outcome</b>
T5 SO4 LO1	•4 Describe types of unauthorised payments and explain the reasons for handling unauthorised payments discreetly. <b>Subject Outcome 5</b>
T5 SO5	Describe organisational procedures for operating a payment point. <b>Learning Outcome</b>
T5 SO5 LO1	•5 Research and discuss organisational procedures for operating a payment point. <b>Subject Outcome 6</b>
T5 SO6	Interact with all customers in a polite and friendly manner at all times. <b>Learning Outcome</b>
T5 SO6 LO1	•6 Display politeness and friendliness towards the customer whilst completing the transaction. <b>Subject Outcome 7</b>
T5 SO7	Prepare till(s) and billing machines correctly for operation. <b>Learning Outcome</b>
T5 SO7 LO1	•7 Prepare till(s) and billing machines correctly for operation and where appropriate, complete hand-over procedures correctly. <b>Subject Outcome 8</b>
T5 SO8	Operate payment point equipment in accordance with organisational procedures. <b>Learning Outcome</b>
T5 SO8 LO1	•8 Operate payment point equipment in accordance with organisational procedures. <b>Subject Outcome 9</b>
T5 SO9	Keep sufficient stock of audit rolls, receipt rolls or customer bills. <b>Learning Outcome</b>
T5 SO9 LO1	•9 Explain the importance of keeping sufficient stock of audit rolls, receipt rolls or customer bills, and replacing these when necessary. <b>Subject Outcome 10</b>
T5 SO10	Deal with customers promptly and explain the importance of prompt service.

- Learning Outcome**
- T5 SO10 LO1 •10 Deal with customers promptly whilst processing the payment and explain the importance of prompt service.
- Subject Outcome 11**
- T5 SO11 Alert the supervisor/manager when a shortage of change arises.
- Learning Outcome**
- T5 SO11 LO1 •11 Alert the supervisor/manager when a shortage of change arises.
- Subject Outcome 12**
- T5 SO12 Given the end of the shift, close the payment point down or complete the hand-over correctly.
- Learning Outcome**
- T5 SO12 LO1 •12 Close the payment point down at the end of a shift or complete the hand-over correctly.
- Subject Outcome 13**
- T5 SO13 Make suggestions on how to secure the payment point from unauthorised access at all times.
- Learning Outcome**
- T5 SO13 LO1 •13 List suggestions on how to secure the payment point from unauthorised access at all times.
- Subject Outcome 14**
- T5 SO14 Given a range of unexpected situations, decide whether to deal directly or request assistance.
- Learning Outcome**
- T5 SO14 LO1 •14 Given a range of unexpected situations, decide whether to deal with the situation directly or request assistance from the supervisor/manager. (Range of unexpected situations: discrepancies with cash, shortage of supplies/change, customer disputes, float shortages, problems with customer payments, equipment malfunctions, counterfeit money/suspected card/cheque fraud, errors or voids.)
- Subject Outcome 15**
- T5 SO15 Acknowledge receipt of payment.
- Learning Outcome**
- T5 SO15 LO1 •15 Acknowledge receipt of payment. (Range of payment: cash, credit/debit cards, cheques, tokens, vouchers.)

**Critical cross-field outcomes**

The critical cross-field outcomes are covered throughout the book:

**Critical cross-field outcomes**

1. Identify and solve problems that arise, either in the daily running of a

tourism enterprise or when dealing with the general needs of tourists as clients, in which responses display that responsible decisions using critical and creative thinking have been made.

2. Work effectively with others in a variety of contexts: as a staff member in the tourism office; as part of a service excellence team; as leader or guide to a tour group; as member of a particular tourism organisation; or being involved in a tourism project to involve and to benefit the local community.
3. Organise and manage oneself and one's activities responsibly and effectively to utilise sound business and marketing skills and to combine these with the basics of the Tourism Operations in order to successfully work towards a tourism industry where service excellence is the main object, because ultimately tourists don't go where they don't receive friendly and professional treatment.
4. Collect, analyse, organise and critically evaluate information that will continuously help to improve standards in the tourism workplace, or that will serve towards the development of the national tourism industry.
5. Demonstrate an understanding of the world in general, and the tourism world in particular, as a set of related systems by recognising that problem-solving contexts do not exist in isolation.
6. Communicate effectively with tourists, using visual and/or language skills in the modes of oral and/or written presentation whilst showing awareness throughout of possible communication barriers such as language or cultural chasms.
7. Use modern technology effectively and critically towards faster and more accurate tourism administration and to keep the tourism industry in tune with our computerised world, but always showing responsibility towards the environment and the health of others in the spirit of conservation and ecology.
8. Contribute to the full personal development of each learner and the social economic development of society at large, by making it the underlying intention of the tourism learning programme to make the individual aware of the importance of knowing that self-improvement plays a key role in an individual's success.
  - 8.1 Reflect on and explore a variety of strategies to learn more effectively those service characteristics and skills that are needed in a service business such as Tourism.
  - 8.2 Participate as responsible citizens in the life of local, national and global communities by not only serving in a travel industry that makes physical contact between local, national and global possible, but by also striving to preserve those very communities through sound sustainable tourism practices.

- 8.3 Use the opportunity of working with so many tourist clients from all walks of life and from all over the world, to be culturally and aesthetically sensitive across a range of social contexts.
- 8.4 Explore education and career opportunities by examining all the various sectors of the Tourism industry and (through practical work) some of the employment possibilities.
- 8.5 Develop entrepreneurial opportunities such as starting up Tourism SMMEs by examining marketing principles and entrepreneurial skills, and by practising how to develop a business plan.

### **The interrelationship of SOs**

The chapters in the Student's Book are based on the topics set out in the curriculum document. Because of the interconnected nature of the subject matter, however, the material in the Student's Book does not always follow the exact order as given in the curriculum document. We presented the text in a logical, practical order, while still covering all the required learning outcomes. In some instances, LOs have been integrated within SOs as indicated in the table at the beginning of each unit in this Lecturer's Guide.

### **Learning Outcomes**

Each SO has its own ASs and LOs. LOs describe the level at which students should demonstrate their achievement of the SOs. The LOs:

- are level specific
- give more detail to SOs
- serve as a benchmark to be achieved by the student in a specific level
- describe ways of achieving the SOs
- define the levels of progression within and across each level in the FET band
- change from level to level.

The Tourism Operations ASs have been designed in such a way that there is natural progression within and across levels.

In the Student's Book, the ASs have been used to develop different units per chapter. ASs are tabulated at the beginning of each unit.

### **Approach and teaching of Tourism Operations**

Tourism Operations is one of the subjects employed to achieve OBE. This means that the CCOs incorporating knowledge, skills, values and attitudes will be acquired through learning this subject. This subject will contribute towards the process of lifelong learning and the realisation of the CCO's.

### **Content and design**

The Tourism Operations programme is vocationally orientated and aims to equip students adequately for the entry into the world of work providing him or her with practical knowledge and skills required in the wider Tourism sector. Tourism Operations integrates academic

knowledge and theory with practical skills and values in which students have to demonstrate competence.

### **Approach**

Students learn best when they discover and do things, have fun, communicate in various ways, are not afraid of failing while attempting tasks, and feel good about themselves when they are successful. Tourism Operations creates opportunities to relate what is learnt to real-life experiences that can be observed through practical experience, simulation and the media. It requires students to learn through discovery, participation and contribution, communication, critical thinking, reasoning, analysing and reflecting. The approach is student-centred, where the lecturer is both a facilitator and a mediator. The lecturer uses team tasks, group work and an assortment of resources, which may include parents, other members of society and stakeholders. The lecturer should motivate the students to take ownership and accept responsibility for their own learning by giving them constant feedback and assurance that they are developing the required knowledge, skills and values.

Students must investigate, explore, research and monitor actual accounting and commercial events. They should participate in role-play activities to help them see how people interface and interact with one another. They should develop their own value system through arguments and debates, and be given opportunities to express their opinions.

It is strongly recommended that you have an up-to-date reading shelf in the Tourism Operations classroom. This shelf should have newspapers, relevant magazines, printed Internet articles and other print media associated with Tourism Operations. Students should monitor news events relating to tourism and the environment. The Tourism Operations lecturer should be ahead of the students in this respect.

The local environment should also be taken into account when teaching Tourism Operations, and lecturers should include practical sessions and field trips in their planning and preparation.

It is important to try to arrange for guest speakers to address the students on certain issues and topics.

Create as many opportunities as possible for students to make presentations. Allow time for debates, where students should be given the opportunities to analyse, interpret and express ideas, defend an argument and draw conclusions.

### **Including students with special needs (LSEN)**

Students with disabilities and special needs should not be excluded from activities. These students should get the opportunity to decide at which point to stop or take up different tasks. Ensure that disabled students get the necessary assistance and support. The presentation hints in the Lecturer's Guide will often suggest ways to accommodate students with special needs.

Lecturers should implement innovative, resourceful teaching and learning strategies in Tourism Operations to accommodate an inclusive education system, to develop the full potential of all students, including those with physical, mental and emotional barriers to learning. Students with special needs, which include 'gifted' students, should also be incorporated into the planning and preparation of learning. Here are some ideas for students with special needs:

- Arrange an oral instead of a written examination for dyslexic students. Dyslexic students should not be penalised for spelling errors.

- Enlarge the text, where possible, for visually impaired students.
- The Student's Book will have to be written in Braille or put onto an audio tape for blind students. Work done in Braille is very bulky, but if it is put into a lever-arch file, it is easier to work with. The written text should also be written above the Braille 'print' so that lecturers unable to read Braille are able to help students.
- A concession of extra time for students who cannot write quickly may be given. The 'rule of thumb' is 15 minutes extra time for every hour.
- In any assignment where reading is involved, a tape recorder can be used for those children who can listen and follow with the taped text.
- Allow students to use the spell check function on computers. Students should also be allowed to use dictionaries if a computer is unavailable.
- Design assignments and examinations in such a way that the writing requirements are minimised (e.g. make use of multiple-choice questions instead of essays).
- On field trips, arrange for students with behavioural problems to be placed with good role models.
- On any fieldwork activities, remember to take a list of any medication requirements (the time medication needs to be administered, etc.).
- When doing any task in class, wheelchair-bound students must be accommodated by ensuring that all materials are in easy reach. Ensure there is enough space for the wheelchair or for a child using crutches.
- Students who move around with difficulty (e.g. on crutches) could use office chairs on rollers where these are available.
- The visually impaired student should be allowed to familiarise him or herself with the classroom.
- Where students are required to do a presentation, use a sign language interpreter for deaf students and a facilitator to help blind students with visual aids.
- Always consider wheelchair accessibility where fieldwork is required. You should contact or visit the venue beforehand to find out whether there is wheelchair access.
- When using graphs or any other graphic works, use wood glue to outline the lines, so that blind students can feel the raised areas. A facilitator will be needed to help and guide the blind student's hands.
- In group work, be aware of the hard of hearing student. Always face the student and talk clearly, but not too loudly. Think about including a sign language interpreter for deaf students.
- Some students may not be comfortable with delivering a verbal presentation in front of the class. Help these students by giving them ideas on how to be well-prepared before making a speech (e.g. using well chosen visual aids to help them through the presentation).

#### **The FET Tourism Operations lecturer**

All subjects in the Vocational Programme Levels 2–4 have new features with which lecturers must cope. Lecturers are required to be OBE compliant and should implement policy laid down by the Department of Education. In essence, this means that SOs and LOs for the FET band should be adhered to.

The lecturer is an interpreter and designer of Tourism Operations learning programmes and materials who should share lesson plans and notes, allow co-lecturers to observe classes or lessons, review lesson plans, plan worksheets, give plans for advanced students and students with special education needs, and show evidence of different evaluations and assessments.

There is a strong focus on acquiring literacy and numeracy skills in the FET band. In Tourism Operations, both languages and mathematical literacy skills are relevant. It is important that students develop communication and quantitative skills in Tourism Operations. This may create an opportunity for the Tourism Operations lecturer to occasionally engage in cross-curricular activities.

An FET Tourism Operations lecturer should undertake professional development as an ongoing and long-term activity. Lecturers are encouraged to enroll for continuing lecturer development provided by Higher Education Institutions (HEIs). The national and provincial Departments of Education offer courses and workshops, and lecturers are urged to attend these.

Lecturers should try to network with:

- other lecturers at their own or other schools, to share ideas and student support materials
- enterprises that could assist in promoting and developing the subject
- the immediate community in which they operate
- other stakeholders who have an interest in the students and the subject.

Lecturers should assist students to assess their own learning, and help them analyse and interpret results so that they are able to improve the learning process and programmes. They should give praise, feedback and encouragement where necessary, based on assessed activities.

Lecturers should also be involved in frequent school-based or cluster-based gatherings and meetings to reflect on teaching and to contribute towards joint planning.

### **The Tourism Operations student**

Students emerging from the GET band are students that have acquired skills, knowledge, values and attitudes underpinned by the critical and developmental outcomes.

The Learning Outcomes in Tourism and other learning areas (GET band) have benefited students in the following ways. They will be students who:

- possess an improved ability in identifying and solving problems
- are able to make responsible and informed decisions using critical and creative thinking skills
- have gained the ability to co-operate and work harmoniously with others in various group contexts
- are able to demonstrate managerial, administrative and consumer skills, and fulfil a meaningful role in the tourism environment
- have been equipped with the skills to collect, analyse and organise information from a variety of sources, and who can critically evaluate information
- have acquired the ability to use different ways to communicate information
- have generally gained an understanding of the world as a set of interrelated systems, locally, regionally, nationally and globally
- have gained an improved understanding of reconstruction, sustainable growth, and development, and are able to reflect critically on its related processes
- have learnt to negotiate, share, take responsibility and participate in the economic matters of their communities, societies, country and on a global scale
- have dealt with cultural and aesthetic issues in a tourism context, and have gained improved sensitivity in dealing with these issues
- have gained knowledge, skills and attitudes in applying entrepreneurial competencies and

exploring related education and career opportunities.

The skills students acquire in Tourism Operations include the ability to:

- argue logically (recognise an argument, identify reasons, identify conclusions)
- discriminate between fact and opinion
- demonstrate numerical and spatial skills (arithmetic, mathematics, statistics)
- communicate effectively (debate, oral presentation)
- think critically (interpret and evaluate information, identify assumptions, ask pertinent questions, point out implications)
- solve problems (identify relevant selection, identify similarities)
- make predictions
- investigate/research.

It is important that students develop language skills so that they can express themselves in a way in which they are understood. Tourism Operations has its own unique language and some words often have different meanings from everyday language.

Tourism Operations also requires students to develop practical skills such as compiling tables, drawing graphs, illustrating models, making sketches and diagrams. Students should also develop technical skills such as the formats and characteristics of essays, assignments, reports, journals, portfolios and summaries.

Tourism Operations students should master mathematical skills (from simple numerical calculations to calculating and converting percentages, applying statistical applications, drawing graphs, etc.).

Values are as important as knowledge and skills, and are required to achieve the SOs. The three groups of values informed by our Constitution and society are listed below.

<b>Educational values</b>	<b>Social values</b>	<b>Tourism Operations values</b>
<ul style="list-style-type: none"> <li>•16 neat work</li> <li>•17 good manners</li> <li>•18 discipline</li> <li>•19 active participation</li> <li>•20 assertiveness</li> <li>•21 consistency</li> </ul>	<ul style="list-style-type: none"> <li>•22 equality</li> <li>•23 Ubuntu</li> <li>•24 honesty</li> <li>•25 respect for the 'rule of law'</li> <li>•26 respect and sensitivity</li> <li>•27 inclusivity</li> <li>•28 justice</li> <li>•29 dignity and self-image</li> <li>•30 morality</li> </ul>	<ul style="list-style-type: none"> <li>•31 rationality</li> <li>•32 efficiency</li> <li>•33 creativity</li> <li>•34 dedication</li> <li>•35 proactivity</li> <li>•36 productivity</li> <li>•37 innovativeness</li> <li>•38 consultation</li> </ul>



## **Tourism Operations and the NCS principles**

The National Curriculum Statement (NCS) follows the principles, purpose and thrust of Curriculum 2005, including OBE.

There is an emphasis on the key NCS principles and values of social transformation; progression; articulation and portability; human rights, inclusivity, environmental and social justice; and valuing indigenous knowledge systems.

OBE, integration and applied competence; progression, credibility, quality and efficiency; high knowledge and high skills underpin the curriculum and are all covered within the purpose, scope and the five topics.

### **Social transformation**

The NCS builds on the visions and values of the Constitution. The Constitution expresses the nation's social values and the roles, rights and responsibilities of citizens in a democratic South Africa. In promoting the students' personal development, we should ensure that we build a national South African identity.

### **Valuing indigenous knowledge systems**

The rich history and heritage of South Africans needs to be recognised as important contributors to the values contained in the Constitution. Indigenous and endogenous local communities need to be included in our actions and thinking regarding tourism.

### **Human rights, inclusivity, environmental and social justice**

The NCS reflects the principles and practice of social justice, and respect for the environment and human rights, as defined in the Constitution. In particular, the curriculum attempts to be sensitive to issues of poverty, inequality, race, gender, age, disability and challenges such as HIV/Aids. Students are encouraged to develop an awareness and understanding of the rich diversity of cultures, beliefs and worldviews within the unity of South Africa.

The Bill of Rights places great value on equality, human dignity, life, freedom and security. These and other rights to freedom of religion and belief, expression and association, exist alongside socio-economic rights. Each person has a right to freedom from poverty, homelessness, poor health and hunger.

In Tourism Operations we have endeavoured to build these principles into the text and the activities. Items directly or implicitly included in the ASs regarding human rights, inclusivity, HIV/Aids, environmental sustainability and socio-economic justice are listed below.

1.	Global economic arrangement and its impact on human rights and the environment.
2.	Industrialisation and the promotion and violation of human rights and the environment.
3.	National macro-economic policy and service delivery with regard to socio-economic rights, education, health, environment, social security.

4.	Labour movements and labour rights (South African labour rights framework).
5.	Workers' rights and responsibilities.
6.	Conventions and declarations of the International Labour Organisation.
7.	Convention on the rights of the child.
8.	Agenda 21 (global partnership agreement to meet the challenges of environment and development, Rio Earth Summit 1992).
9.	Mobilisation of indigenous knowledge in relation to indigenous economic systems and practices (past and contemporary).
10.	Employment equity and basic condition of employment.
11.	Empowerment and government tender regulations.
12.	Black economic empowerment.
13.	Patterns of unequal distribution (income, land, wealth, access to natural and other resources, etc.).
14.	Taxation and compensation for human rights abuses.
15.	Land restitution.
16.	Food distribution, hunger and starvation.
17.	Trade relations, exports, imports and treaties.
18.	Economic activity and the degradation of the environment.
19.	Environmental impact assessment, environmental management practices, and economic and industrial development.
20.	Community participation in local economic planning and activities.
21.	The role of marginalised groups in the economy (women, refugees, etc.).
22.	Access of marginalised groups to participate in the economy.
23.	The structure of economy and exclusion.
24.	Discrimination in service provisioning (such as financing) and access to economic opportunity (affirmative action, redress, etc.).
25.	Economic exploitation, slavery, colonialism and imperialism.

#### **Outcomes-based education**

Outcomes-based education forms the foundation of the South African curriculum. The SOs and ASs have been derived from the CCOs which were inspired by the Constitution, and will ensure that knowledge, skills and values are articulated

#### **High knowledge and high skills**

The NCS sets standards in the learning areas and specifies the minimum knowledge and skills to be achieved by students in each level. In this way, the NCS provides direction on how to develop a high level of skills and knowledge in all students. In Tourism Operations the necessary knowledge and skills have been built into the text and the activities.

#### **Credibility, quality and efficiency**

Articulation refers to the relationship between qualifications in the different NQF bands

(GET/FET) and portability to the extent to which parts of a qualification are transferred to another qualification in a different learning pathway of the same NQF band. This allows for mobility across and within the FET band and recognition of prior learning.

### Planning for the Tourism Operations curriculum

It is imperative that lecturers plan ahead. Students will not be able to attain the SOs prescribed by the LOs for a specified level if the lecturer does not plan adequately. Planning could be summarised as follows:

- a three-year subject framework (macro planning)
- a one-year work schedule that sets out the pace and sequence of teaching and learning activities, and assessment. This work schedule will spell out ‘term plans’ of work to be covered in a particular term (meso planning)
- weekly and daily planning (lesson plans or learning experiences) specifying activities (micro planning).

The year plan that follows is a rough estimate of time to be spent on each unit. Variations may occur, but it is advisable to adhere to the schedule as set out below. The weighted value of topics is given below the year plan.

Week number	Units	Weighted value	No. of weeks
	<b>Chapter 1: South Africa</b>		
1	1 Provinces and cities	7	2
3	2 South Africa and its neighbours	3	1
4	3 The South African landscape	5	2
	<b>Chapter 2: Finding your way in South Africa</b>		
5	4 Maps and signs	5	2
7	5 Getting around	4	1
	<b>Chapter 3: Tourism in South Africa</b>		
8	6 Destinations in South Africa	5	1,5
9	7 Which tourists go where?	5	1,5
11	8 The South African tourism industry	5	1,5
	<b>Chapter 4: Tourism and the environment</b>		
12	9 Our environment	5	1,5
13	10 The impacts of tourism	7	2
15	11 Sustainable tourism	7	2
17	12 Approaches to tourism	4	2
	<b>Chapter 5: Culture and Heritage</b>		
19	13 What is culture?	2	1
20	14 What is heritage?	3	1
21	15 Heritage resources	5	1,5
22	16 Heritage sites	4	1

	<b>Chapter 6: Tourism practice</b>		
24	17 Understanding heritage to enhance performance	5	1,5
26	18 Recognising our heritage	5	1,5
28	19 An alternative tourism experience	5	1,5
29	20 Enhancing your client's tourism experience	3	1
	<b>Chapter 7 Stakeholders and legislation</b>		
31	21 Stakeholders in the tourism industry	3	1
32	22 Tourism and the law	3	1
		100	32

Topic	Weighted value
1. Tourism in South Africa	50
2. Sustainability of tourism in South Africa	25
3. Conservation and heritage	25
TOTAL	100

### Designing a learning programme

A Learning programme is a tool that enables lecturers to plan for sequenced learning, teaching and assessment opportunities across the FET Band (i.e. Levels 2–4) so that a point is reached where all five Subject Outcomes in Tourism Operations have been achieved in a progressive manner.

A Learning programme consists of the following three stages of planning:

- Subject Framework (Levels 10–12)
- Work Schedule per level
- Lesson Plans.

The following steps should be considered when designing a learning programme:

#### Step 1: Clarify the SOs

- Check the policy documents to check the SOs and ASs for the learning programme.
- Critical Cross-field outcomes also need to be taken into account

#### Step 2: Clarify the kind of evidence required

- Consult various resources, including the curriculum policy documents, to determine what students are expected to achieve and to find relevant source materials. The purpose is to establish what should be included in the learning programme and to what level.
- List the knowledge to be included: facts, concepts, theories, etc.
- List the skills to be developed. These may be subject-specific skills, such as using scientific equipment, or general skills such as group work, time management or research skills.
- List the contexts that will help focus on attitudes and values. We cannot 'teach' attitudes, but

we can create opportunities for students to form, test and even change their attitudes, beliefs and values. We create these opportunities by focusing on real-life contexts that encourage students to express and explain personal views on issues.

- Decide on the assessment activities, methods and tools that will be used during the programme. Decide on what assessment will happen and how this will be recorded and reported.

**Step 3: Design the teaching, learning and assessment plan**

- Draw up a plan that puts what will be learnt into a sequence for delivery in class. Divide the learning programme into sections (or chapters, or learning experiences or lessons). This should match the time allocated on the level plan.
- Work out how long each section will take. Allocate an appropriate number of periods for each section. Include time for assessment.
- If students need to draw on previous work or on learning from another subject, check with other lecturers.

**Step 4: Design each learning activity or experience**

- Plan what will happen at each stage during the learning experience, lesson or period, and allocate an approximate time, in minutes, for each stage. Allow time for questions, unexpected interruptions, etc.
- Decide on which learning methods to use. Will learning happen through direct presentation? Will students do tasks? Will students work alone or in groups? What must be done in class and what will be given for homework?
- Plan what resources will be needed and in what quantities.
- Plan the assessment tasks, questions or assignment.

**Step 5: Reflect, record and prepare**

- Reflect and note what worked and what needs to be changed.
- Decide what learning programme needs to be completed next.

Template for a lesson plan (learning experience)						
Subject:		Topic:		Level:		
SOs:						
COs:						
DOs:						
LOs:						
Lecturer's actions	Student activities	Key concepts/content	SKVs	Assessment strategies	Resources	Estimated time
Expanded opportunities:			Enrichment:			
Special needs:			Homework:			
Reflection:						
Lecturer		Date		Comment		

Lecturers should reflect on the lessons taught and assess themselves to ensure that NCS standards and quality lessons are in place. The following checklist may help.

<b>Have I ...</b>	
checked all policy documents for curriculum requirements?	
selected SOs for the subject and the relevant LOs and checked that all activities and assessments are linked to the SOs and LOs?	
considered related SOs and LOs from other fields of learning?	
decided on a logical set of knowledge and skills (including communications and presentation skills) as part of the programme?	
included values, attitudes, opinions, decisions and predictions in the programme?	
balanced skills, knowledge, insight and personal learning in the programme?	
checked that the programme is at an appropriate level of rigour, depth and breadth for the level, age and level of development of students?	
decided on tasks and/or tests as the assessment strategy for the programme?	
developed an overall teaching, learning and assessment plan for the programme?	
planned each lesson in such a way that I have ...	
•1 planned and prepared resources for each learning experience?	
•2 put everything in the plan into a sequence of delivery?	
•3 added time limits to every section (to a maximum of 80%)?	
•4 referred to what students already know of the topic?	
•5 balanced direct and student-centred activities?	
•6 planned learning activities that create assessment evidence?	
•7 allowed students to be able to assess their progress?	
•8 balanced group and individual work?	
•9 planned for students to read, write, speak and listen?	
•10 included integrated activities that are realistic and feasible?	
•11 referred to the real-world applications and contexts?	
•12 catered for different learning styles in some way?	
•13 thought about homework or projects?	
•14 listed, provided, checked and reproduced resources?	
•15 identified any new or difficult words?	
•16 included questions that test comprehension, logic etc.?	
•17 prepared assessment instruments and checked them?	
•18 checked alignment to the COs and DOs?	

### Internet sites

It is recommended that you use Internet sites. Some Internet sites have been quoted at the beginning of every chapter in the TG under the heading resources.

## Assessment

### Introduction

Assessment in the National Certificate (Tourism) 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
  - nation-building.

Assessment in OBE should be part of the continuous and integrated process of focusing on students' growth and development. Assessment should take place in the context of a friendly, caring, non-judgmental environment, and serve as a positive affirmation of the student.

The Subject Assessment Guidelines (SAG) use assessment in both formative and summative ways in order for students to demonstrate the SOs in relevant contexts. Managing assessment involves three stages:

- collecting evidence
- recording assessment
- reporting.

Assessment is part of the learning process in OBE and should not be seen as a separate activity. Assessment is done to:

- determine what students know and at what point to start with the new learning experience
- identify and diagnose any barriers to learning
- provide information for reviewing and evaluating learning programmes
- encourage students to participate in the learning process
- apply and use knowledge in real-life contexts.

The following aspects are assessed:

- SOs
- ASs
- LOs
- Knowledge, skills, values and abilities
- Metacognition.
- Integrated assessment tasks.

### **Types of assessment**

**Baseline assessment** takes place *at the beginning* of an activity or a learning process so that lecturers and students find out what students already know. The recording of baseline assessment is usually informal.

**Diagnostic assessment** takes place *throughout* the learning process and is used to identify and diagnose barriers that students may have so that lecturers can plan to overcome these. It includes extended opportunities and activities for gifted students.

**Formative assessment** is used *throughout* the learning process to inform whether teaching and learning is successful in achieving the outcomes. Any form of assessment that gives feedback to the student fulfils a formative purpose.

**Summative assessment** takes place *over time and at the end* of a learning experience. It can occur at the end of a single learning activity, a unit, a cycle, a term, a semester or a year.

[the section I have highlighted in yellow seems quite arbitrary – perhaps provide a heading or intro to explain it?]

### **Methods of assessment**

- Self-assessment
- Peer assessment
- Group assessment
- Lecturer assessment

### **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/Tasks
- Projects
- Investigations/Research
- Case studies
- Practical exercises
- Demonstrations
- Role-play
- Interviews
- Examinations
- Class Tests
- Practical examinations
- Oral tests



- Open book tests

**Assessment tools**

- Observation sheets
- Individuals' notes and
- Comments
- Check lists
- Rating scales
- Rubrics
- Marks (e.g. %)
- Rating scales (1-4)

**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 ended:** Students use same process to achieve different end points
- All students answer the same questions in the same way and within the same time

**Reporting tools**

- Report card using national codes and comments on competence,
- Lecturer-parent interview
- Lecturer-student interview
- Written comments in student work books
- Day-by-day assessment sheets, etc.

[heading?]

The table below could be used as a checklist to determine whether the assessment target meets the method. For example if you want to assess skills, performance-based and observation-based assessment are the best methods to do this (check that they both have a rating of 5).

	Objective	Essay	Performance based (Individual)	Oral questions	Observation	Self-assessment
Knowledge	5	4	3	4	3	2
Reasoning	2	5	4	4	2	2
Skills	1	3	5	2	5	3
Product	1	1	5	2	4	4
Values and attitudes	1	2	4	4	4	5

*Note: Higher numbers indicate better matches (e.g.5 = high, 1 = low). Table adapted from*

### **Assessment principles**

For assessment to be effective it should be:

- A **valid** process that integrates knowledge, skills and values. There should be evidence that has been collected on a number of occasions and in a variety of contexts and situations.
- **Level-appropriate**. It should be appropriate to the knowledge, skills or attitudes to be assessed, and to the development level of the student.
- **Focused**. It must assess what it is intended to.
- **Reliable**. All assessment should be monitored and reviewed so that there is standardisation and consistency in the interpretation of the evidence.
- **Fair and transparent**. Students must know how they are going to be assessed and what criteria will be used for assessment.
- **Flexible**. Assessment must cater for and take cognisance of different learning styles, and a range of assessment techniques should be used.
- Authentic, continuous, varied and balanced.
- An ongoing, integral part of the learning process.
- Accurate, objective, practicable, effective and time-efficient.
- Bias-free and sensitive to gender, race and cultural background.
- Used to identify areas where students need support and remedial intervention, or provide evidence of progress in achieving outcomes.

### **Assessment methods**

Some of the assessment methods used in OBE and other education systems are explained below.

- **Self-assessment**. Students assess themselves against given criteria (skills that are important for life-long learning), which may be reflected on a self-checklist. Students reflect on their own performance and recognise the limitations of their work.
- **Peer assessment**. Students assess each other in pairs or groups and may use checklists to do this. Peer assessment should not be interpreted as students marking each other's work and/or counting the marks.
- **Three-way assessment**. This provides an opportunity for students, lecturers and care-givers to acknowledge a student's progress and achievement. Students take work home that has been assessed by the lecturer and by themselves. Care-givers respond with a comment on the student's achievement and progress.
- **Test-based assessment**. The same evidence is gathered for all students in the same way and at the same time. It is a far more rigid process. A mark or a score verifies tests and examinations. In the past, too much emphasis was placed on tests and examinations.
- **Task-based assessment**. These include well-structured assessment activities that show whether students are competent at applying the skills and knowledge they have learnt to unfamiliar contexts or contexts outside the classroom. Task-based assessment has its own range of scoring instruments in a marking memorandum. Criteria or standards have to be carefully selected (and sometimes negotiated with the students) and should be described in a rubric.
- **Performance-based assessment**. This is a direct or systematic observation of a student's performance or an examination. Performance-based assessment requires students to engage in activities where they demonstrate specific skills or develop specified tasks (e.g. projects, debates, assignments, speeches and presentations).

### **Internal Continuous assessment (ICASS)**

Assessment should be ongoing and link learning and products. In OBE, planning takes place with the SOs and LOs in mind. As we assess, we make decisions that are based on that assessment, and then those decisions will in turn be assessed, and so on, which is the principle of continuous assessment.

Internal continuous assessment is abbreviated as ICASS and referred to as college-based assessment by using instruments such as projects, tests, assignments, investigations, role-play, case studies, etc. ICASS is an ongoing process of gathering valid and reliable information (evidence) about the performance of the student during a year or level. ICASS is undertaken either in a real workplace, a simulated/workshop or structured environment, is moderated internally, or externally quality assured by Umalusi. The results and findings of ICASS should be recorded, reflected upon and reported on by giving positive, supportive and motivational feedback to students, other lecturers, care givers and any other bona fide interested parties.

All ICASS evidence is contained in a Portfolio of Evidence (PoE), and must be readily available for monitoring, moderation and verification purposes.

#### **ICASS:**

- allows lecturers to use any planned learning experience to assess student achievements and progress
- is a necessary feature of the total evaluation of every student
- takes place over a long period
- is diagnostic and allows the lecturer to monitor strengths
- assists in addressing the needs of the student
- enables lecturers to pace students and provide enrichment
- sets well defined outcomes for the students to achieve
- ensures that the learning programme is significant for the student, and prevents 'teaching for a test'
- covers a wide spectrum of learning activities and tasks
- is transparent as students are aware of the assessment criteria
- develops a sound assessment record to track the learning progress
- provides useful data for reporting and progression
- involves assessment of knowledge, skills, values and attitudes
- encourages lecturers and students to appraise their own work.

A compulsory component of ICASS is the *Integrated Summative Assessment Task (ISAT)*, which is a major assessment task that draws on the students' cumulative learning achieved throughout the full year. The task requires *integrated application of competence* and is executed under strict assessment conditions. The duration of the task should aim to equate a 4–7 hour work session and should take place in a simulated or structured work environment. This is the most significant test of the students' ability to apply the knowledge acquired. The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.

## Number and forms of assessment for Level 2 assessment programme

At Level 2, an internal assessment component counts 50% of the final assessment mark. An example of the requirements of the internal assessment programme for Level 2 is summarised as follows:

[This table still needs to be completed: ]

Term 1	Term 2	Term 3	Total
1 x Task e.g. Assignment	1 x Task e.g. Project	1 x Task e.g. Presentation (oral and written)	3x tasks
1 x Test		1 x Test	2 x tests
	June Examination	September Examination	2 x exams
			<b>7</b>

Examinations should conform to the requirements set by the Department of Education. They should be carefully designed and weighted to cover all the ASs of Tourism Operations.

The tasks should be carefully designed so that they will give the students opportunities to research and explore the subject in a focused and exciting manner. Examples of assessment forms are debates, presentation, projects, simulations, assignments, models, case studies, long essays and research projects.

### Instrument 1: Control tests (two per year) and examinations (two per year)

The following conditions apply to control tests:

- All classes in the same level write the same test at the same time.
- The tests should be based on accumulative work.
- Moderation of the question paper and answer scripts should take place at school level (internal school moderation).
- Tests should be written under examination conditions.
- Questions should comply with the end-of-year examination standards.
- Where there is more than one lecturer teaching the subject, agreement should be reached on the scope, date and time of the test.
- The structure and mark allocation should be similar to the final National Senior Certificate (NSC) Level 2 examination.

### Instrument 2: Research Assignment (minimum of one per year)

For assignments, students are required to investigate and report on certain issues. Ideally the task should be phrased as a question so that the students can form their own opinions based on acquired subject knowledge. Assignments may also be in the form of practical research.

### Instrument 3: Project (minimum of one per year)

- A project is a learning activity involving investigation and solving problems by an individual or small group of students. It could consist of a task in which the student sets out to attain some definite goal of real personal value.
- Students should be encouraged to develop research, critical thinking and problem-solving skills.
- Projects should be tackled without close supervision, but with assessor (lecturer) guidance

and support.

- Students should be given the assessment criteria before starting the project.
- Students will need to complete at least one project according to CASS requirements. The lecturer can decide whether to give the students a range of topics to choose from or select only one topic for all the students to do.
- It is suggested that projects are dealt with in the first term.
- The project should consist of 4–10 handwritten pages, excluding pictures, graphs, displays etc.

When preparing a project, the following minimum requirements should be met:

- a title page
- a table of contents.
- text divided into paragraphs
- references for sources
- the text could include pictures, photos, diagrams, graphs, etc.
- the project should be presented in an acceptable way (bound or stapled).

#### **Instrument 4: Oral Presentation (minimum of one per year)**

Presentations allow students to demonstrate manual and/or behavioural skills. The assessment may be based on the end result of the activity (the product), or the carrying out of the activity (the process), or a combination of both.

Presentations can be based on a project, but also given as separate tasks or assignments. The presentation can be written or oral, but proof of the presentation must be included in the portfolio. All criteria used to assess the presentation must be discussed with the students before starting the presentation.

### **Day-by-day assessment: practical application**

#### **Simulations**

Simulations mirror actual activities or conditions. They are suitable for assessments where demonstrations and observation will provide reliable and valid results, but where, for a number of reasons, it is difficult or impractical to assess under actual conditions.

#### **Scenario/Case study**

Students are presented with a real-life situation, a problem or an incident related to the learning outcome and expected to assume a particular role in articulating the position. They could draw on their own experiences, the experiences of peers or prior learning to interpret, analyse and solve problems. Solutions/recommendations related to the case study/scenario are then made and presented.

#### **Role-plays**

Students are presented with a situation, often a problem or an incident, to which they have to respond by assuming a particular role. The enactment may be unrehearsed, or the student may be briefed in the particular role to be played. Such assessments are open-ended and are person-centred.

#### **Oral questions**

These are mainly used to generate evidence of a student's ability to listen/sign, interpret, communicate ideas and sustain a conversation in the language of assessment. Oral questions

include oral examinations, interviews, conferences and other conversations in which information is obtained about a student's learning.

### **Observations**

This is the type of assessment that is commonly used by lecturers without consciously thinking about it. Lecturers constantly observe students informally to assess their understanding and progress. They watch students as they respond to questions or as they study. The lecturer listens to students as they speak to and discuss issues with others. Observation is also used extensively in performance-based assessment and other formal techniques.

### **Class tests**

- Lecturers design their own diagnostic tests and conduct these during instruction time and at their discretion according to the needs of the class.
- Objective tests could include multiple choice, matching, true or false, and short answer completion, and used to assess the theory parts of the subject.
- Class tests should cater for the multiple intelligences of the students, and appropriate rubrics could be used for assessment.

### **Debates**

Topics for debates should relate to the ASs and be formulated as contentious statements. Students should be given sufficient time to research their topics and prepare their arguments. Students should not exceed a time limit of three minutes per speaker. Students engage in a formal debate in groups not larger than eight.

### **Portfolios**

Lecturers and students should have portfolios in which they collect evidence of school-based learning and assessment. Portfolios facilitate moderation and verification processes, and should be readily available for this purpose.

The *lecturer's portfolio* should contain all the instructions, assessment criteria and rubrics relating the Annual Assessment Plan given to the students. Each student should have a *student's portfolio* that contains assessed items as evidence used to calculate their internal assessment mark. Portfolios should have a clear intent and purpose that is linked to AS.

### **Grading students' work**

Tourism Operations, as is the case for all the other vocational subjects, will be assessed according to four levels of competence. Each level description is contained in the table below

#### **Scale of achievement for the vocational component [should this not be a 7-level rubric?]**

<b>Rating code</b>	<b>Rating</b>	<b>Marks %</b>
5	Outstanding	80-100
4	Highly competent	70-79
3	Competent	50-69
2	Not yet competent	40-49
1	Not achieved	0-39

Subject competencies have been described to distinguish the level expectations of what students must know and be able to achieve. The descriptions for Tourism Operations are outlined in the Subject Assessment Guidelines for Tourism Operations (National Certificate Level 2 – Tourism).

Both college-based and external assessment should be criterion-referenced. Marks could be used to evaluate specific assessment tasks, but the tasks should be assessed against rubrics. Tasks or questions should address an aspect of a particular outcome and the AS should be used when creating a rubric for assessing that task or question.

### Assessment in Tourism Operations

External Assessment in Level 2 Tourism Operations will count 50% and college-based assessment or internal assessment counts 50% towards the progression mark of the student. The college based assessment (ICASS) component, in turn, has a summative component (internal examinations and standardised tests) and a formative component (assignments and tasks to develop subject skills: e.g. monitoring and research activities, presentations, debating, numerical calculations, summarising, memorising).

Tests and examinations will focus on assessing knowledge and understanding, through mainly the application of the acquired subject-specific knowledge and skills of the student.

#### Summative assessment

The summative component of college-based assessment comprises 50% of the total for the year. At Level 2, the summative component of ICASS includes standardised tests.

Questions typically start with commands or key words. These words indicate which skills are required when answering the question. If candidates are asked to evaluate a problem, but only show knowledge and understanding, they will lose most of the marks for that question. The meanings of the most frequently used verbs are listed below.

<b>Knowledge and understanding</b>	
Define	Give the exact meaning of a term or concept using words or mathematical symbols (e.g. Define heritage resources).
Describe	Give an account. (e.g. Describe the tourism product)
Identify	Single out from other information (e.g. Identify the types of tourists).
Illustrate	Use examples to explain a point (e.g. Illustrate by means of an example the value of sustainable tourism).
List	State briefly (e.g. List three modes of transport).
Outline	Give a short description of role of Government (e.g. Outline the organisations involved in tourism).
State	Give or say (e.g. State two reasons why tourists travel).
Summarise	Bring out the main points from a complex set of data (e.g. Draw a mind map that summarises the sectors in the tourism industry).
What	Clarify a point (e.g. What are the main characteristics of a successful tourism operation?).

<b>Application</b>
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Apply	Use knowledge of Tourism Operations to understand an issue or to solve a problem (e.g. Apply your knowledge on equity to identify whether the following transactions would have a positive or a negative effect on equity).
Calculate	Use mathematics to work out an answer (e.g. Calculate the cost price of a tour).
Distinguish between	Identify the characteristics that make two or more ideas, concepts, issues, etc. different (e.g. Distinguish between the characteristics of a travel agent and a travel organiser).
Explain	Make clear (e.g. Explain the process of making reservations).
Suggest	Give possible reasons or ideas that are plausible but not necessarily correct. 'Suggest' may require candidates to analyse a problem and not just apply Tourism Operations problems (e.g. Suggest reasons why a business would sell to customers on credit).
<b>Analysis</b>	
Analyse	Break down into constituent parts in order to be able to understand an issue or problem. Analysis involves recognising what is important, and applying knowledge and understanding of Tourism Operations (e.g. Analyse the payment procedure).
Compare and contrast	Show similarities and differences between two or more ideas or problems (e.g. Compare by tabulating the similarities and differences between a mass travel and individual travel).
Examine	Break down an issue or problem to understand it (e.g. Examine the role of communities in sustainable tourism).
Investigate	Look for evidence to explain and analyse (e.g. Investigate the economic impact of tourism and present your findings in a report).
<b>Evaluation</b>	
Assess	Analyse an issue or problem, and then weigh up the relative importance of different strands (e.g. Assess the success of the different methods used to make tourism sustainable).
Comment on	Invites students to make judgements based upon the evidence they have presented (e.g. Comment on why good management is the key to a successful business).
Critically analyse	Analyse an issue/problem and weigh up the relative importance (e.g. Critically analyse the three options to conserve heritage sites).



Do you think	Invites students to give their own opinions about an issue or problem. However, marks will always be awarded for the quality of the argument and not for any individual opinions (e.g. Do you think it is better for a business to sell credit that only cash?).
Discuss	Compare a number of possible views about an issue and weigh up their relative importance. A conclusion is essential. (e.g. Discuss the importance of screening customers before allowing them to buy on credit.)
Evaluate	Similar to discuss; to compare a number of possible views. A final judgement is essential. (e.g. Evaluate the advantages and disadvantages of tourism.)
To what extent	Explain and analyse and then comment upon the relative importance of the arguments (e.g. To what extent should a tour guide make use of loans to finance his/her business?),

Summative assessment involves a minimum of three control tests (at least one per term for the first three terms).

#### **Formative assessment**

Formative assessment informs the lecturer and the student of the student's progress. It contributes towards the formation and the development of the student's formative years. The formative component of college-based assessment comprises 50% of the total for the year. The formative component of ICASS must include various activities. For example:

- research and monitoring of relevant, contemporary tourism issues
- other ongoing tasks to develop skills that are necessary for successful functioning within the subject
- creative responses to problems within the subject field
- more informal assessment of day-to-day knowledge and skills acquired through creative class tests, presentations of the previous day's work, class quizzes, etc.

The formative component should cater for the multiple intelligences (i.e. verbal-linguistic, interpersonal, intra-personal, musical-rhythmic, bodily-kinaesthetic, mathematical/logical, spatial) of students in an inclusive education context.

A **performance assessment** is a direct observation of an actual student performance or an examination of products created. During a performance assessment, students are engaged in activities that require the demonstration of specific skills or the development of specific products. The demonstrations can take place in a controlled environment (such as a laboratory or a classroom), or in a real-life environment, where the complexities faced by the students are much higher. In the latter case, the performance assessment is also called an 'authentic assessment'. Students are expected to demonstrate complex learning that integrates knowledge, skills and values in a single performance.

Characteristics of performance assessments:

- Students are expected to perform, produce, create or do something.
- The skills are those displayed by individuals outside the classroom (i.e. in society or in the

workplace).

- Higher order thinking processes and problem-solving skills are required for these tasks.
- They provide opportunities for students to present and explain their work.

The following steps are suggested in developing a performance assessment.

Clearly identify the outcome(s) to be assessed (i.e. create a clear and appropriate target for the students).

- Determine the purpose of the assessment and the use of the results.
- Design a performance task that will elicit the expected outcome(s).
- Specify the assessment criteria.
- Select and construct the storing and recording instruments(s).

Performances include everyday teaching and learning activities such as projects, debates, assignments and speeches. When performing, students are applying their skills in a way that is integral to the teaching and learning process.

### The external assessment component (50%) – Level 2

External assessment is assessment that is conducted by an entity such as a provincial examining body, a national agency, or a private agency that is not directly involved with the instruction of the students. It consists of a written examination paper that is externally set, marked and moderated.

An example of a typical Tourism Operations Level 2 examination which is externally set, marked and moderated is outlined below:

A typical Tourism Operations Level 2 examination (external assessment) question paper	
Number of papers	1
Time	3 hours
Marks	200
Format	
Section A (compulsory): <b>Subtotal = 80</b>	This section will include different types of objective questions, i.e. Q1 multiple choice (30) Q2 short theoretical questions (20) Q3 calculations (30)
Section B (compulsory): <b>Subtotal = 120</b>	Q1 Journals (40) Q2 Posting to General Ledger (30) Q3 Final accounts and Balance Sheet (30) Q4 Influence on accounting equation(20)

Suggested guidelines for the distribution of the levels of questioning are indicated in the table below.

Level of questioning	Percentage
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Level 1 – Knowledge and comprehension	40%
Level 2 – Application	20%
Level 3 – Analysis, synthesis and evaluation	10%

The total mark obtained in the examination paper is then converted into an appropriate rating and code on the seven-point scale.

Bloom’s taxonomy may be used as a guide to setting questions.

**ACTION VERBS ACCORDING THE COGNITIVE LEVEL OF BLOOM’S TAXONOMY**

<b>Knowledge</b>	<b>Understanding</b>	<b>Application</b>	<b>Analysis</b>	<b>Synthesis</b>	<b>Evaluation</b>
define	compare	adapt	categorise	combine	appraise
describe	define	compute	classify	compose	critique
identify	describe	discover	compare	create	decide
label	distinguish	draw	contrast	depict	evaluate
locate	explain	gather	deduce	design	judge
name	generalise	graph	differentiate	develop	justify
recognise	illustrate	modify		incorporate	recommended
select	infer	operate	distinguish	integrate	
state	interpret	prepare	explain	invent	consider
memorise	match	revise	generalise	organise	support
	summarise	show	infer	plan	relate
	rewrite	solve	predict	predict	summarise
	paraphrase	survey	relate	produce	
	express	use	solve	structure	
			modify		

## Assessment tools (rubrics and checklists)

**Rubrics** are a combination of rating codes and descriptions of standards. They consist of a hierarchy of standards with benchmarks that describe the range of acceptable performance in each code band. Rubrics require lecturers to know exactly what is required by the outcome. Rubrics can be holistic, giving a global picture of the standard required, or analytic, giving a clear picture of the distinct features that make up the criteria, or can combine both.

Holistic rubrics score the overall process, while analytic rubrics score the individual parts. It is important to note that:

- the student is only assessed once for each criterion within a rubric
- the comments column should be completed as this makes the moderation process easier
- rubrics can be used individually or combined with others
- rubrics may be joined together for ease of marking
- lecturers are encouraged to formulate rubrics in consultation with other lecturers at cluster or school level
- working in clusters and setting up collaborative rubrics would bring about comparable standards.

The following steps may help you in drawing up a rubric:

- Step 1: Examine the AS that describes the task.
- Step 2: Specify the skills, knowledge and attitudes to be evaluated.
- Step 3: Identify the observable attributes.
- Step 4: Identify the attributes that you do not wish to see.
- Step 5: Brainstorm the characteristics that describe each attribute and how they can be described so that they can be classified into average, above average and below average.
- Step 6: Write descriptions for excellent and poor performances.
- Step 7: Write descriptions for other levels.
- Step 8: Collect samples of work that represent each level.

The following section includes 19 sample tables or rubrics that can be adapted where necessary for particular activities. These are referred to throughout the Lecturer's Guide.

Standard rubrics

**RUBRIC 1**

Criteria	Rating scale			
	4 = Outstanding (80–100%)	3 = Competent (70–79%)	2 = Not yet competent (60–69%)	1 = Not achieved (0–59%)
CONTENT Range Coverage Relevance				
CONTEXT Command word requirements				
SKILLS and VALUES Skills Values				
MECHANICS Subject terms Language Format				

The following checklist may be used to evaluate a rubric.

	Yes	No
Does the rubric emphasise the most important content and skills of the SO/AS/LO?		
Are the criteria used in the rubric of appropriate importance?		
Are there sufficient levels of performance to discriminate between the quality of students and work?		
Are the levels clearly described in terms of performance?		
Do the levels accommodate students' diversity?		
Does the rubric distinguish between content and skills as well as the communication thereof?		
Does the rubric contribute to an efficient marking process?		
Was a careful decision made between using marks and level descriptors or letter symbols?		
Does the rubric offer appropriate guidance to the students?		

## Checklists

**Checklists or task lists** show what has to be done. Marks given are assigned to the most important parts of a task.

Checklists list a number of predetermined criteria against which the lecturer or student makes a tick to indicate that the student is able to do what is stated or that the work complies with the criteria. Checklists differ from rubrics in that they do not use a set of standards or a scoring scale.

Checklists can be devised by the lecturer and then used by the students to assess how well they coped with a particular task or activity. Alternatively, the lecturer, together with the students, can list the criteria before the task is undertaken and then the students can use this checklist to assess their performance. The criteria should be stated in such a way that the students can respond by ticking the 'yes' or the 'not yet' column, or simply using a tick to show that they can do or have done what is stated.

### Reflective self-assessment checklist

Individual projects are very personal and more difficult to assess. They are also process-orientated rather than product-orientated.

### RUBRIC 2

Amount of time spent on project (time scale to be determined)	less than	1	2	3	4	5	or more
Number of family members spoken to							
Do you feel you learned anything about yourself when doing this project?	yes			no			
Comment:							
Do you feel the project helped you understand yourself?	yes			no			
Comment:							
Do you think you expressed this information about yourself in an interesting and exciting way?	yes			no			
Comment:							
Do you think you put a lot of effort into this project?	yes			no			

### Group work and group assessment

Teamwork is an important part of learning skills and constructing knowledge. Sharing the workload and being aware of personal contributions to the community is important for every student. In a group, the roles and responsibilities are essential to the success of the activity. Evaluating students in different roles assists in their awareness of management processes and effective co-ordination. The lecturer or the students may use this instrument for evaluating each

member of the group or to evaluate each other's contributions. This rubric should have space for comments on how the students in the group experience group work, and how they are able to improve or change the roles they play within the group.

Roles within the group should be rotated to allow each student to develop or become aware of their different capabilities.

Different group/team roles include:

- timekeeper
- team leader/chairperson/manager
- resources manager
- scribe/note taker/record keeper
- reporter
- motivator
- assessor
- peace maker.

When students work in groups to tackle complex activities and more demanding tasks, efficient organisation is crucial. The process can be helped if different students take on different roles. The lecturer and students can decide which roles are most appropriate in terms of the activity/task. Initially the lecturer can assign these roles, but once the students are familiar with the process, they can take responsibility for assigning these roles within their groups. This needs to be monitored to ensure that all students have an opportunity to play different roles and exercise the different skills involved. A rubric should be devised that clearly sets out the different roles, the criteria for each role and the standards that will be applied. An example of a rubric that has been designed to assess the different roles and the skills involved is shown below.

Each member of the group can assess all the roles except the one that he or she performed. The mark for each criterion within a role can be added to give a total score for the role.

Students can also decide which roles are required for a particular activity, mark them off and assign the roles before continuing with the activity.

<input type="checkbox"/>	Voice monitor	<input type="checkbox"/>	Time keeper
<input type="checkbox"/>	Motivator	<input type="checkbox"/>	Record keeper
<input type="checkbox"/>	Assessor	<input type="checkbox"/>	Chairperson/manager
<input type="checkbox"/>	Peace maker	<input type="checkbox"/>	Reporter

**Group skills rubric**

**RUBRIC 3**

<p><b>Group name/number:</b> .....</p> <p><b>Names:</b>.....</p>			
	<b>YES</b>	<b>NO</b>	<b>Comment</b>
Did our group members:			
•1 listen to each other?			
•2 talk about the task?			
•3 co-operate within the group?			
•4 suggest good ideas?			
•5 encourage each other?			
•6 achieve the outcomes?			
<p>What went well?</p> <p>.....</p> <p>What could we have done better?</p> <p>.....</p> <p>Signed:..... Date .....</p>			

**Co-Operative Group Skills Assessment Sheet**

**RUBRIC 4**

TASK SKILLS	Student *	Student *	Student *	Student *	Student *	Student *
gives ideas						
asks questions						
stays on task						
follows directions						



checks the understanding of others							
gets group back on track.							
<b>SOCIAL SKILLS</b>							
encourages others							
explains ideas							
discusses							
listens well							
resolves conflict							
praises others							

Add the names of each student in the group under 'Student' and enter a tick ✓ (Yes) or an x (No) under the name of each student for each of the criteria.

#### RUBRIC 5

<b>Process</b>	Everyone took part equally.	Not yet	1	2	3	4	5	Yes
	The group held a meeting to plan.	Not yet	1	2	3	4	5	Yes
	Each student did what they were supposed to do.	Not yet	1	2	3	4	5	Yes
	Everyone in the group feels happy about the project.	Not yet	1	2	3	4	5	Yes
	The project offers a lot of information.	Not yet	1	2	3	4	5	Yes
	The group explored the following sources: school library, public library, Internet, people, newspapers, clinics, advice offices, other.	Give one mark for each source explored (up to five marks).						
<b>Product</b>	The information is set out in a way that is clearly understood.	Not yet	1	2	3	4	5	Yes
	There are interesting drawings and illustrations.	Not yet	1	2	3	4	5	Yes
	Written information is easy to read and to follow; ideas are described well.	Not yet	1	2	3	4	5	Yes
	The ideas are shown in an unusual and interesting way.	Not yet	1	2	3	4	5	Yes

	There are a lot of the students' own ideas – not only copied materials.	Not yet	1	2	3	4	5	Yes
	Information is presented clearly; you know what the message is.	Not yet	1	2	3	4	5	Yes
<b>Presentation</b>	The group uses drama, speaking, music, singing, pictures and objects to help the presentation.	Give two marks for each thing used (up to six marks).						
	All group members took part in the presentation.	Not yet	1	2	3	4	5	Yes
	The presentation is interesting and unusual.	Not yet	1	2	3	4	5	Yes
	You can hear what everyone is saying.	Not yet	1	2	3	4	5	Yes

### Assessing a research project

The following marking grid could be used where marks allocated are circled according to the sub-criteria (below the grid) and are then transferred to this grid by the different persons assessing the project.

### RUBRIC 6

Criteria	MARK AWARDED			
	Self	Peer/group	Consensus	Lecturer
1. planning				
2. quality of research				
3. continuous collection of information and material				
4. final product: creativity				
5. final product: quality of contents				
6. technical quality				
7. oral presentation				
8. individual/group role				
<b>Converted to</b>				

### General guideline

- 4 Excellent
- 3 Meets the requirement.
- 2 Does not meet the requirement – student needs support.
- 1 Student made no/very little effort – student needs substantial support and guidance.

**Planning**

- 4 Most practicable planning schedule, independently drawn up by student.
- 3 Good planning schedule, with a only a number of small adjustments by lecturer needed.
- 2 Planning schedule not totally practicable - a substantial degree of adjustments needed Planning schedule totally impracticable - totally new planning necessary.
- 1 [insert criteria]

**Quality of research**

- 4 Wide variety of sources used.
- 3 Adequate number of sources used.
- 2 Less than adequate number of sources used.
- 1 No recognised resources used; no research done.

**Continuous collection of information and material**

- 4 A lot of information collected continuously / submitted before due dates.
- 3 Adequate information collected / submitted before/on due dates.
- 2 Less than adequate information collected / some due dates missed.
- 1 Very little information collected / seldom met due dates; no information collected or handed in at all.

**Final project: originality/creativity**

- 4 Unique, original presentation of extremely high quality.
- 3 Standard presentation – content is relevant and interesting.
- 2 Requirements have been met, and no more.
- 1 Content entirely / almost entirely copied directly from sources; no effort made.

**Final project: quality of content**

- 4 In-depth presentation pertaining to real-world practice / evidence is shown of insight into relationship between subject theory and real-world practice. Student demonstrates very good insight.
- 3 Relevant content shows good insight, area of research well covered.
- 2 Some part of content is relevant – partly copied directly from sources – insight lacking.
- 1 Very little effort made – content largely copied directly from sources; content only slightly in line with topic – copied directly from sources.

**Technical quality**

- 4 Proof of pride and very hard work – impressive final product – made full use of available sources/technology.
- 3 Good final project.
- 2 Minimal effort made – presentation still acceptable.
- 1 Very little trouble taken – untidy, shabby presentation; project not handed in / unacceptable presentation and/or appearance of content.

**Analytic Rubric**

**RUBRIC 7**

	<b>Not achieved</b>	<b>Not yet competent</b>	<b>Competent</b>	<b>Outstanding</b>
<b>Knowledge and under-standing</b>	Demonstrates little understanding of some concepts, principles and theories. Demonstrates little command of relevant factual knowledge.  Shows little understanding of composition and structure.	Demonstrates some understanding of simple concepts, principles and theories. Demonstrates some command of relevant factual knowledge.  Shows some understanding of composition and structure.	Demonstrates significant understanding of major concepts, principles and theories. Demonstrates significant command of relevant factual knowledge.  Shows significant understanding of composition and structure.	Demonstrates complete understanding of all concepts, principles and theories. Demonstrates complete command of relevant factual knowledge.  Shows complete understanding of composition and structure.
<b>Context</b>	Shows little ability to mould content in the required context.	Shows some ability to mould content in the required context.	Shows significant ability to mould content in the required context.	Shows complete ability to mould content in the required context.

	Shows little ability to construct tables and present data graphically.	Shows some ability to construct tables and present data graphically.	Shows significant ability to construct tables and present data graphically.	Shows a general ability to construct tables and present data graphically.
<b>Skills</b>	Makes inadequate interpretations based on data and other evidence.	Makes limited interpretations based on data and other evidence.	Uses a variety of means to analyse and present data and draws substantiated conclusions.	Uses a variety of means to analyse and present data and draws valid conclusions.
<b>Attitudes/values</b>	Demonstrates wrong attitudes/values.	Demonstrates no particular attitudes/values.	Demonstrates appropriate attitudes/values consistently.	Demonstrates significant attitudes/values exceptionally well.
<b>Communication</b>	Shows a limited Tourism Operations vocabulary and no ability to use linguistics principles.	Uses Tourism Operations terms but lacks the ability to communicate quantitatively. Makes errors in grammar and paraphrasing.	Uses enriched Tourism Operations terminology and 'good practice' linguistic principles.	Shows exceptional command of advanced Tourism Operations terminology and 'best practice' linguistic principles.

### Assessing oral presentation

e.g. Assignments, project, essays and journals (i)

Some examples of rubrics to assess oral presentations are given below. These were designed to assess specific tasks or processes. They could be adapted to assess similar tasks or processes, but are primarily meant to illustrate how rubrics can be designed.

**RUBRIC 8**

Circle the number indicating the rating, where 1 is the lowest rating and 4 is the highest rating.

Location	1	2	3	4
Appeal	1	2	3	4
Neatness/tidiness	1	2	3	4
Communication	1	2	3	4
Variety	1	2	3	4
Appropriateness	1	2	3	4
Content	1	2	3	4
Technique	1	2	3	4
Total	1	2	3	4
	..... / 40		.....%	

**RUBRIC 9**

Name: .....				
Skills areas	Outstanding	Competent	Not yet competent	Not achieved
	4	3	2	1
Observation				
Recording				
Inference				
Investigative				
Evaluation				
<b>Marks</b>				
<b>Total</b>				
				Mark: Total: Percentage:

**Observation skills** are demonstrated when students are able to:

- match, classify and identify items
- interpret e.g. drawings, diagrams, graphs, figures and written passages
- observe features and characteristics.

**Recording skills** are demonstrated when students are able to:

- record information exposed to by reading, observation and interaction
- summarise written and/or spoken and/or demonstrated or acted information

- present data graphically, i.e. draw curves and other presentations e.g. charts and histograms, scale axes and label appropriate components meaningfully.

**Skills of inference** are demonstrated when students are able to:

- calculate data correctly and accurately e.g. averages
- percentages, and fractions
- recognise patterns and trends in raw or ordered data, extract information from results, interpolate and extrapolate
- distinguish between observations (statements describing what has been seen, heard, etc., whether qualitative or quantitative) or from inferences
- make plausible generalisations from observations.

**Investigative skills** are demonstrated when students are able to:

- identify aspects of a problem that can be investigated
- formulate the aim and a general strategy for an investigation
- write a research outline, and collect relevant data and other information
- make valid observations, deductions and interpretations, and argue soberly
- proof or reject hypotheses convincingly
- show a clear understanding of the three basic methods used in research.

**Evaluation of processes** are demonstrated when students are able to:

- identify weaknesses and strong points (e.g. in arguments and policies)
- recognise that results may be incomplete or inconclusive
- formulate constructive criticisms and appraisals.

**Verbal presentation rubric (ii)**

**RUBRIC 10**

Assessment criteria	Achievement: suggested mark allocation				Students			
	Outstanding	Competent	Not yet competent	Not achieved				
Development: Structure, organisation, support material	15 to 20	14 to 11	10 to 8	0 to 7				
Effectiveness: Purpose, interest, reception	11.9 to 15	9 to 11.9	5.9 to 8.9	4.4 to 5.8				
Value: Ideas, logic, originality	11.9 to 15	9 to 11.9	5.9 to 8.9	4.4 to 5.8				
<b>Content sub-total</b>	<b>50</b>							
<b>Delivery</b>								

Physical: Appearance, body language	7 to 10	6 to 6.9	4 to 5.9	0 to 3.9				
Voice: Flexibility, volume	7 to 10	6 to 6.9	4 to 5.9	0 to 3.9				
Manner: Directness, assurance, enthusiasm	7 to 10	6 to 6.9	4 to 5.9	0 to 3.9				
<b>Delivery sub-total</b>	<b>30</b>							
<b>Communication</b>								
Appropriateness: To purpose and audience	7 to 10	6 to 6.9	4 to 5.9	0 to 3.9				
Correctness: Grammar, punctuation, word selection	7 to 10	6 to 6.9	4 to 5.9	0 to 3.9				
<b>Language sub-total</b>	<b>20</b>							
<b>Total marks: maximum = 100</b>								



Values assessment

RUBRIC 11

4	<p><b>Excellent</b></p> <ul style="list-style-type: none"> <li>•1 Comprehensive understanding and implementation of all instructions; consistently produces exemplary and neat work.</li> <li>•2 Exceptionally polite and respectful.</li> <li>•3 Participates with enthusiasm, listens well; does more work than expected.</li> <li>•4 Sets an excellent example and commands others to behave well.</li> <li>•5 Can confidently/with conviction express opinions, even against popular opinion.</li> </ul>
3	<p><b>Meets the requirement</b></p> <ul style="list-style-type: none"> <li>•1 Follows instructions regularly; makes an effort to produce neat work.</li> <li>•2 Shows acceptable level of respect and courtesy.</li> <li>•3 Well behaved and not disruptive.</li> <li>•4 Can answer questions, even if unsure; expresses opinions.</li> </ul>
2	<p><b>Does not meet the requirement – needs support</b></p> <ul style="list-style-type: none"> <li>•1 Instructions often not followed; work untidy and rushed.</li> <li>•2 Shows respect towards some; disrespectful to others.</li> <li>•3 Sometimes disrupts and distracts; need to focus more on work.</li> <li>•4 Only does the minimum work required; erratic interest shown.</li> <li>•5 Hesitant to express self in class; needs to be drawn out.</li> </ul>
1	<p><b>Makes very little effort</b></p> <ul style="list-style-type: none"> <li>•1 Does not follow instructions, work always untidy and incomplete.</li> <li>•2 Ill-mannered, sometimes rude.</li> <li>•3 Disruptive and distracts others.</li> <li>•4 Shows very little interest, passive re schoolwork.</li> <li>•5 Seems shy/reluctant to answer questions; never expresses an opinion.</li> </ul>

Mark allocation	Self		Lecturer		Final mark	
		5		5		5

Poster communication skill assessment

RUBRIC 12

Criteria	Range				
	1	2	3	4	Comments
<b>CONTENT</b>					
<b>Main points</b>	Points irrelevant	Some points irrelevant	Main points selected	All points selected	
<b>Facts/concepts</b>	Facts incorrect	Some facts incorrect	Most facts correct	All facts correct	
<b>Expressing facts</b>	Poorly expressed	Partially expressed	Expressed	Very well expressed	
<b>PRESENTATION</b>					
<b>Size of poster (A3)</b>	Incorrect size	Correct size	Correct size	Correct size	
<b>Headings</b>	Not descriptive	Partially descriptive	Fairly descriptive	Descriptive	
<b>Font/print size</b>	All too small	Some large enough	Mostly	All large enough to read at one metre	
<b>Organisation/layout</b>	Muddled	Organisation quite clear and logical	Organisation clear and logical	Organisation very clear and logical	
<b>Use of colour</b>	Poor	Average	Good	Excellent	
<b>Public appeal</b>	Not eye-catching	Fairly eye-catching	Eye-catching	Striking	
<b>Personal information</b>	Not included	Some included	Included	Included	

**Interview skill assessment**

**RUBRIC 13**

Criteria	Performance indicator		
	0	1	Comments
Prior research knowledge	Not visible	Visible	
Suitable environment/conditions	Not considered	Considered	
Comfortable voice, tone and pitch	Too loud/too soft	Appropriate	
Body language and manner of interviewer	Not acceptable	Acceptable	
Pacing of interactions/interview	Too fast/too slow	Appropriate	
Focus of questions asked	Not focused on the topic	Focused on the topic	
Clarity of questions asked	Not understandable/clear to the person being interviewed	Understandable/clear to the person being interviewed	
Value to community	Not obtained through the questions	Obtained through the questions	
Written/oral report of interview	Not brief, focused and integrated	Brief, focused and integrated	

**Mind map construction assessment**

**RUBRIC 14**

Criteria	Range				Comment
	0	1	2	3	
Use of concepts/key words	More than four errors	3–4 errors	1–2 errors	All correct	
Use of linking words	More than four errors	3–4 errors	1–2 errors	All correct	
Layout and spatial organisation	Too small and cramped	Cramped	Clearly laid out		

Use of highlighting and focal points	Not used	Colours used, but not in a logical way	Colours used are linked to the logic
Neatness	Untidy	Neat	

**Assessment of questionnaire development and conducting a survey**

**RUBRIC 15**

Criteria	Range				Comment
	0	1	2	3	
Questionnaire clarity and relevance	Confusing and irrelevant	Not clear or relevant	Clear and relevant		
Questionnaire brevity and focus	Too long/too short	Sufficient length			
Sensitivity to responses/person being interviewed (gender/age/race/disability )	Insensitive	Only sensitive towards one or two aspects	Sensitive towards three aspects	Shows sensitivity towards all categories	
Representative sample (sufficient responses)	Insufficient/too few responses	Sufficient number of responses			

**Portfolio assessment**

Students look through written assignments in their portfolios and reflect upon the changes they see over a period of time.

**RUBRIC 16**

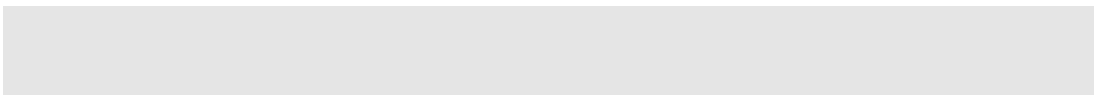
Name	Level
What do you know now that you did not know before?	
What do you do better now?	
What improvements would you still like to make?	
Write a short paragraph reflecting on your progress.	

**Managing methods, tools and techniques of assessment**

The table below will assist you in monitoring and managing how often you use the variety of methods, tools and techniques of assessment.

**RUBRIC 17**

<b>Who assessed?</b>										
Self-assessment										
Peer assessment										
Group assessment										
Lecturer assessment										
Other										
<b>What evidence did the student produce?</b>										
Assignments										
Collages										
Conferencing										
Constructions										
Demonstrations										
Drama										
Exhibitions										
Game designs										
Graphs/drawings										
Interviews										
Mind mapping										
Model making										
Panel discussions										
Portfolios										
Practical presentations										
Project										
Questionnaires										
Research projects										
Role plays										
Rubric										
Scenarios										
Simulations										
Survey/debates										
Tests										
Worksheet										
Written presentation (e.g. essays/reports)										



# Chapter 1: Tourism operations

## About this chapter

The table below outlines the work covered in this chapter.

**Chapter 1: Tourism operations**

Unit 1: Operating office equipment	Unit 2: Maintenance of equipment	Unit 3: Monitor and request equipment consumables	Unit 4: Safety in the workplace
<ul style="list-style-type: none"> <li>Information technology in tourism</li> <li>Equipment in the tourism office</li> <li>Computers</li> <li>The Internet</li> <li>Photocopiers</li> <li>Fax machines</li> <li>Printers</li> <li>Faults, problems and persistent malfunctions</li> </ul>	<ul style="list-style-type: none"> <li>Cleaning</li> <li>Maintenance</li> <li>Safety</li> <li>Requesting consumables</li> </ul>	<ul style="list-style-type: none"> <li>Interview with Lawrence</li> </ul>	<ul style="list-style-type: none"> <li>Organising a work area</li> <li>Reporting safety risks</li> <li>Coping with emergencies involving equipment</li> </ul>

## Learning outcomes and assessment standards

This chapter deals mainly with the first Subject outcome in Topic 1 for Tourism Operations in the Further Education and Training Phase: Operate and maintain office equipment. Follow instructions to operate office equipment.

# Unit 1: Operating office equipment

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 1	T1 SO1 LO1

Activity 2	T1 SO1 LO1
Activity 3	T1 SO1 LO1
Activity 4	T1 SO1 LO2
Activity 5	T1 SO1 LO2
Activity 6	T1 SO1 LO2

### Activity 1: Technology in the real world

Student's Book page 12  
T1 SO1 LO1

#### Guidance and additional information

The students work in groups to complete this after-school activity. Assist them with arranging visits to the local tourism companies or organisations they choose. Students investigate the kinds of technology that the companies they visit use for written communication and they look at the positive and negative aspects of using these technological developments for written communication.

#### Answers

There are no fixed answers.

#### Suggested assessment

Assess the creativity with which the groups approach and execute this task. Also allow the groups to do group assessment of their groups, and peer assessment of each other for this activity. Students can develop the example rubric on page xx in this Teacher's Guide by adding relevant points.

#### Inclusive education

If you have any students in wheelchairs, you should make sure that the travel agency they want to visit is wheelchair friendly. Also make the necessary arrangements for transporting a wheelchair.

### Activity 2: Surfing the Net

Student's Book page 12  
T1 SO1 LO1

#### Guidance and additional information

If possible, students gain access to the Internet and explore different tourism websites. If this option is not possible, have a class discussion about the Internet. Ask students to collect newspaper and magazine articles about this information superhighway and discuss the importance of this communication channel with the class.

#### Suggested assessment

Do the students understand how important and big the Internet is? If they have never used the Internet, do they find the idea exciting and are they enthusiastic about using the wealth of information available on the information superhighway?

#### Inclusive education

Students with low vision could use a large-print monitor and large-print keyboard to make it



easier for them to work on a computer.

### Activity 3: Copies for records

Student's Book page 13  
T1 SO1 LO1

#### Guidance and additional information

Help students to find access to a photocopying machine. Discuss the importance of record-keeping with the class and discuss alternative ways of copying documents, such as keeping carbon copies of handwritten or typed letters.

#### Suggested assessment

This is a fairly simple activity. Assess students' ability to understand the importance of record-keeping. Also assess their ability to express their views in writing.

### Activity 4: Find a fax machine

Student's Book page 15  
T1 SO1 LO2

#### Guidelines and additional information

Students investigate where they can gain access to a fax machine. They visit a business where a fax machine is used and look at how the machine is operated.

#### Suggested assessment

Observe whether the students are able to think of creative and practical ideas for finding access to a fax machine. Do they give up hope easily and become despondent or do they try to solve the problem enthusiastically?

### Activity 5: Write a fax

Student's Book page 15  
T1 SO1 LO2

#### Guidelines and additional information

Make sure that all students are familiar with the operation of a fax machine. Review the information supplied in the Student's Book.

#### Answers

Students should present the information in their own words.

#### Suggested assessment

Method: Individual

Form: Class work

Method: Written presentation

#### Inclusive education

Allow students to write the fax on computer so that dyslexic students can use the spell-check function.

### Activity 6: Understanding equipment

### Guidelines and additional information

This is a straightforward activity. You will need a board or flipchart to list the students' responses and help them to summarise the overall findings on a large chart on the board. You will also need to facilitate the class discussion. Try to draw the students' attention to different needs, if any, shown by the different sectors of the industry. It might be a good idea to draw different charts for different sectors before or after designing the generic summary. You could ask them to do this as an additional exercise. This will give the students the opportunity to differentiate between the sectors, even at this early stage.

### Answers

There are no set answers – these will be generated by the findings.

### Inclusive education

The charts should be large enough to enable partially sighted students to see them. If you think that these students are having difficulty in seeing the board, you could arrange to enlarge the charts and copy them after the lesson.

Students with hearing impairments could give their charts to a fellow student in written form and the peer could discuss them on their behalf. Alternatively, the educator could act as the reader or interpreter. It would be essential for these students to receive clear copies of the summary charts with some written notes or explanations.

The physically challenged will need assistance in the form of transport to the venues. Peers can be used to assist these students if wheelchairs are available.

### Suggested assessment

Method: Individual or group

Form: Report back to class

Tool: Oral presentations

# Unit 2: Maintenance of equipment

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 7	T1 SO1 LO3
	T1 SO1 LO4
	T1 SO2 LO1

### Activity 7: Find out more about the maintenance of office equipment

### Guidelines and additional information

Help students, where necessary, to make arrangements to visit an agency. After the visit, follow the instructions as set out in the Student's Book.

### Suggested assessment

Method: Individual

Form: Fieldwork

Tool: Written presentation

### Inclusive education

On a field trip ensure that the place chosen to visit is easily accessible for any students who may be in wheelchairs and that it has facilities for disabled persons.

# Unit 3: Monitor and request equipment consumables

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 8	T1 SO3 LO1–4

### Activity 8: Find out about stock control

Student's Book page 28  
T1 SO3 LO1–4

### Guidelines

The learning of material for this unit is covered by a field trip to a travel agency. The students must do the necessary research and write a report on their findings.

### Answers

This will be determined by the students' findings.

### Inclusive education

- On a field trip ensure that the place chosen is easily accessible for any students who may be in wheelchairs and that it has facilities for disabled persons.
- Assist dyslexic students by giving them examples of a flowchart and encouraging them to use a dictionary.

### Suggested assessment

Method: Research

Form: Fieldwork

Method: Written presentation

# Unit 4: Safety in the workplace

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 9	T1 SO2 LO3–4
	T1 SO2 LO1
Activity 10	
Activity 11	
Activity 12	
Activity 13	

### Activity 9: Identify the safety risks

Student's Book page 30  
T1 SO2 LO3–4, T1 SO2 LO1

Some of the risks you could have mentioned are:

- Do not eat or drink while operating equipment. Foodstuffs can dirty the equipment. Liquid, in particular, can damage it seriously if it spills. For example, if coffee, tea or cooldrink spills on your keyboard, the computer will malfunction.
- Wires across open walkways can cause people to trip and can also be a fire hazard, especially when they are on top of a carpeted surface because the friction of constant feet can cause a fire to ignite.
- Smoking or any open flame near equipment is extremely dangerous because this can cause fires. Smoking should in any case not be allowed in the office environment because it is a health hazard.
- Paper near equipment can also cause fires if combined with an electrical malfunction.
- Boxes, reams of paper, wires and cables near frequently-used equipment can cause employees to trip and injure themselves.
- Do not overload trolleys so that you cannot see in front of you – you can collide with someone and cause serious injury.
- Always be careful when turning a corner – you can collide with someone and cause injury, especially if one of the people is carrying hot liquid which could cause burns or if he or she is overloaded with files, boxes, etc. that could fall and injure someone.

Activity 10

Activity 11

Activity 12

Activity 13

# Chapter 2: Managing information

## About this chapter

The table below outlines the work covered in this chapter.

**Chapter 2: Managing information**

<b>Unit 5: Confidentiality</b>	<b>Unit 6: Types of records</b>	<b>Unit 7: Storage and retrieval systems</b>	<b>Unit 8: Recording and storing information</b>
<ul style="list-style-type: none"> <li>• Why is confidentiality important?</li> <li>• Some guidelines regarding confidentiality</li> <li>• Storage of confidential information</li> </ul>	<ul style="list-style-type: none"> <li>• Identifying types of records</li> <li>• Contracts</li> <li>• Agreements</li> <li>• Quotations</li> <li>• Policies</li> <li>• Changes to contracts, agreements or quotations</li> </ul>	<ul style="list-style-type: none"> <li>• What is filing?</li> <li>• Storing information using an existing storage system</li> <li>• Methods of filing</li> <li>• Classifying material</li> <li>• What is a good filing system?</li> <li>• Filing equipment</li> <li>• Filing in the tourism industry</li> <li>• Storing valuable documentation and reference material securely</li> <li>• Cross referencing</li> <li>• Removing files from filing cabinets</li> </ul>	<ul style="list-style-type: none"> <li>• Why should we store information?</li> <li>• Storing records of company and passenger information</li> </ul>

Learning outcomes and assessment standards [see chap 1]

## Unit 5: Confidentiality

### Unit outcomes

<b>Activity</b>	<b>Topic, Subject Outcome and</b>
-----------------	-----------------------------------

	Learning Outcome
Activity 14	T1 SO3 LO3
Activity 15	T1 SO3 LO3, T2 SO3 LO4, T2 SO4 LO1–2

### Activity 14: Do you understand confidentiality?

Student's Book page 39  
T2 SO3 LO3

#### 1. Definition of confidentiality

This is the definition of confidentiality as found in the *Oxford Dictionary*:

'To be kept secret; not to be made known to others, confidential files or letters. Trusted with private information or secret'

2. Some examples of client information which is sensitive and should be kept confidential are:

- name
- address
- phone number
- ID number or passport number.
- bank details.

Examples of organisational information which should be kept confidential are:

- Commissions
- Information about tenders which are being submitted or have been submitted
- Special rates negotiated with certain clients by tour operators, car hire companies, airlines etc.
- In the car rental industry, details of special rates, fleet sizes and type of new vehicles (this could give the company a competitive advantage over other companies) as well as the number of rentals done daily
- Some planned training courses
- New locations or branches being planned.

3. The reason why this information should be treated as confidential is to protect clients and the organisations with which they do business.

Some guidelines:

- If a colleague violates security procedure, it is your duty to report this to the manager. This may be unpleasant, but violations of confidentiality could have serious results for the company and clients – if you don't report them, you could also be suspected of being involved in the offence!
- If a policeman visits or telephones asking for information about a client, the identity of the police officer must first be checked. A subpoena issued and stamped by the court is to be exhibited before any information is given – in cases of this nature it is always advisable to refer the issue to a responsible senior officer in your company. Even the police do not have automatic access to confidential information and must give a documented reason as to why the information is required. It is then up to the manager to make the decision as to whether to assist the policeman.
- Never give confidential information to *anyone* without the clear permission of the client. Inform the client that someone was asking for this information. The same applies to the

situation where someone could telephone the organisation, saying that he or she has found a purse, pen, file or other item belonging to the client. Do not give the client's contact detail- rather ask for the caller's telephone number and advise him or her that you will contact the client.

Activity 15

# Unit 6: Types of records

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 16	T2 SO2 LO2
Activity 17	T2 SO2 LO1-3
Activity 18	T2 SO2 LO4
Activity 19	T2 SO2 LO4
Activity 20	T2 SO2 LO2
Activity 21	T2 SO2 LO2
Activity 22	T2 SO2 LO2

### Activity 16: Definition and examples

Student's Book page 43  
T2 SO2 LO2

#### Guidelines

Discuss the different types of documents with the students. If possible, bring examples to class.

#### Answers

The students must give their own definitions of the relevant concepts. Accept any answers as long as they contain all the pertinent information.

#### Inclusive education

Help dyslexic students with research and do not penalise them for spelling mistakes. Provide dictionaries in the classroom

#### Suggested assessment

Method: Self-assessment

Form: Class work

Tool: Written presentation

### Activity 17: Revision worksheet

Student's Book page 50  
T2 SO2 LO1-3

## Guidelines

- Questions 1–2 (information on passenger ticket) can be done as a ‘speed test’ or as a standard revision test in class. The answers can then be taken in and marked and included in the student’s portfolio. Marks can be allocated if you prefer – see suggested mark allocation below.
- It is important to discuss the results of the written part of the test when you return the test to the students. It is also important to give feedback on the role-play.
- The second part of question 2 should encourage research and the use of the Internet, if possible. It is important to make the students aware that e-tickets are rapidly replacing ‘old-style’ passenger tickets, which will possibly soon become obsolete.
- Question 4 is a ‘fun’ exercise, but students should show knowledge and awareness of terms and conditions. Some time can be given for preparation.

## Answers

1. An airline ticket is a valid contract because it is *legally binding* to *both* parties (2 marks)

2. A passenger ticket contains the following:

- Conditions of carriage.
- Advice to international passengers on limitation of liability.
- Important notice regarding a passenger's onward and return reservations.
- A list of dangerous goods not to be included in baggage.
- Departure information.
- IATA free articles.
- Notice of baggage liability limitation.

(Accept any *five* items) (5 marks)

3. An e-ticket is electronically generated and resembles a receipt of payment. Although it does not contain the same amount of information as an ‘old-style’ ticket the same conditions apply. (3 marks)

4. See the extracts below for answers to 4a–d. The portions particularly relevant to this case study are printed in italics.

The whole extract has been included to contextualise the answer.

a. Change of destination

A change of destination doesn't happen often, but it can occur when an airline decides to fly into an alternative destination in a country.

A recent example of this is SAA's decision to fly to *Washington* instead of Atlanta in the United States. Some passengers had purchased their tickets earlier with the expectation of landing in Atlanta. Their onward journeys would have been booked from *Atlanta* or they may have needed to stay on in Atlanta.

*In this case SAA would have contacted the passengers and made arrangements to carry the passenger from Washington to Atlanta so that the passenger may continue on his or her journey with no additional cost.*

b. Delays

The safety of passengers is of great importance to the airlines and, as they contract to carry their passengers from point A to point B, airlines rely on all elements of the journey combining smoothly for a safe journey. This doesn't always happen as the weather might not be suitable for take-off and landing or the aircraft could experience a technical problem. Another problem could be strike action.

*Delays often happen as a result and passengers should understand that it is in their interest*



*that the airline has delayed the flight.*

*Should this happen the airline will accept responsibility and will provide accommodation, transfers and meals to passengers who are delayed overnight and have to wait for the next flight.*

*The airline may also agree to reimburse a passenger who has paid for accommodation at his destination and will now not be able to take up the booking. The passenger would have to apply directly to the airline in writing for this.*

*Should the flight be delayed for a few hours, the airline provides meal vouchers so that the passengers may purchase something to eat and drink whilst waiting for their flight to depart.*

c. Passenger 'bumped off' a flight

As air travel has become so popular, airlines sometimes find that they have more passengers booked than seats available. This happens because airlines have found that not all passengers arrive for a flight. Some passengers do not advise the airlines that they will no longer be travelling and some may have been delayed by unforeseen circumstances.

Another reason is that travel consultants sometimes forget to cancel a reservation. This doesn't happen that often these days as the airlines cancel reservations which do not have ticket numbers inserted on them. Travel Consultants have been warned by some airlines that they will receive a fine if they don't cancel their reservations. The fine will come in the form of an ADM (Agency Debit Memo).

As a result of these circumstances, airlines accept a small number of reservations over and above their seat capacity.

*Should all the confirmed passengers report for check-in for a flight, the airline will ask if there are volunteers willing to travel on the next flight. The volunteers are normally offered vouchers for free flights.*

This is what you will find on a 'bumped off' passenger's ticket cover:

**DENIED BOARDING BY OVERBOOKING**

In those countries where denied boarding compensation regulations are in force, carriers operate *compensation plans* for passengers with confirmed reservations who are denied boarding because of non-availability of seats caused by over booking.

d. Baggage

*As part of their contract with the passenger, airlines also agree to carry the passenger's baggage from point A to B.*

IATA defines baggage as 'passenger's articles and effects and personal property as necessary and appropriate for wear, use, comfort and convenience in connection with the passenger's journey'.

Should the baggage be *delayed* (put on the incorrect flight in error) the airline will ensure that the baggage is *forwarded to the passenger's address at his destination* and, should the baggage be *damaged*, the airline will *reimburse* the passenger in most cases *if the correct procedures are implemented*.

Conditions of acceptance of baggage

*All checked baggage must be properly packed in suitcases or similar containers in order to ensure safe carriage. Fragile or perishable articles, money, jewellery, precious metals, silverware, negotiable papers, securities or other valuables, business documents or samples, will not be accepted as baggage.*

Students should be able to name at least five examples of unacceptable baggage.)

Suggested marks for Question 4: (30 marks). Use own discretion.

5. Role play

Please use the suggested rubric for role play or oral presentations (page xx of this book).

### **Suggested assessment**

Method: Questions 1–4: Performance-based

Question 5: Group

Form: Questions 1–4 Test

Question 5: Class work – role play

Tools: Questions 1– 4: Memorandum

Question 5: Oral presentation (role-play)

### **Activity 18: Renting a car**

Student's Book page 52  
T2 SO2 LO4

#### **Guidelines:**

This is an important activity as it trains students to read an official document carefully – a skill which is essential in adult life, not just in the tourist industry.

Emphasise the importance of this as many students have never thought of how they would cope with such a situation and therefore will be at a disadvantage in the working world and in situations where they will have to enter into agreements and sign contracts in their personal lives e.g. a mortgage or hire purchase agreement – even a marriage contract or agreement!

#### **Answers**

1. Yes, you are eligible. People over 24 can hire any class of vehicle, provided you are in possession of a valid driver's licence.  
Yes. Rates include maintenance, oil and Value Added Tax at the current rate.
2. You must obtain written authorisation from the car rental (fee of R400 payable for cross-border letter). Local damage waiver, loss waiver and exceptions liabilities apply. It is your responsibility to obtain the required border permits.
3. He will possibly not be allowed to drive. An additional driver is authorised only if he or she is over the age of 23, although you could investigate the information under the heading DRIVERS UNDER 23 YEARS and ask if he would be allowed to drive a car in the groups J, T, A, B and C.
4. You should immediately notify the Car Rental Company.
5. R255,00

#### **Inclusive education**

The agreement should be enlarged to assist students with sight impairments.

#### **Assessment**

Method: Self-assessment and answers by students.

Form: Homework or class work.

Tool: Students compare their answers with the rest of the class and mark the questions according to suggested answers.

### **Activity 19: What did they say?**

Student's Book page 54  
T2 SO2 LO4

#### **Guidelines**

This should prove to be an enjoyable activity, using the comic strip medium. Please use

discretion when marking – the student can use any acceptable dialogue, provided that the *correct information* is conveyed in an appropriate (i.e. *professional* and *polite* manner). When the students have individually filled in the ‘bubbles’, they can be divided into pairs and share their dialogues with their partners. This can be followed by a general class discussion of suggested dialogues.

#### **Suggested answer – general guidelines**

This is what should have happened during the conversation: Pam, the consultant, explains that although the ticket shows a South African Airways flight number, the flight is operated by Qantas. This gives both airlines an opportunity to sell their fares but not have to make use of both of their aircraft. Mr Khumalo is quite happy about this as he has flown on SAA before and will now have the chance to fly on Qantas.

#### **Inclusive education**

The comic strip should be enlarged for partially-sighted students. An OHP transparency of the comic strip could also be made and displayed in the classroom during this exercise.

#### **Suggested assessment**

Method: Peer

Form: Case study

Tool: Written and oral presentation

### **Activity 20: Investigating quotations**

Student's Book page 56  
T2 SO2 LO2

#### **Guidelines**

Once again, this is an important activity which encourages careful reading of a document. This is of particular importance in the tourism industry.

#### **Answers**

1. R5 500
2. Airport taxes and surcharges +- R1 800.00 Taxes are based on the daily Rand/Dollar exchange rate and are subject to change. He cannot expect these costs to remain the same.
3. R7 300.00
4. The above fare is guaranteed for 72 hours. Should the ticket not be issued within the time specified the fare will be cancelled.
5. A valid passport and a visa.
6. He will be denied boarding – the name on the ticket must be exactly the same as the name on passport.
7. She will have to contact the airline and re-issue the ticket. He cannot expect the agency to pay for this – see the last paragraph of the letter.

#### **Inclusive education**

The activity will have to be enlarged to cater for students with sight impairments.

#### **Suggested assessment**

Method: Self-assessment and answers by students

Form: Homework/class work

Tool: students compare their answers as a class and mark the question according to the suggested answers.

### Activity 21: Policies

Student's Book page 57  
T2 SO2 LO2

#### Guidelines

This is an open activity as each student will provide a different example. The purpose of this is to encourage research and to provide students with a range of possibilities. As has been pointed out, possibly the most commonly used policy in the travel industry is the medical insurance policy, but any policy, e.g. insurance, company policy, etc. will be acceptable.

#### Suggested answers

There are no cut and dried answers to this activity as each student's will be somewhat different. Students must demonstrate that they understand the terms and conditions of the chosen policy and be able to explain these to their peers. The previous exercise on the agreements will help them here.

Points to be kept in mind are:

1. A policy states aims, plan of action and/or terms (refer to dictionary definition in textbook).
2. A general policy differs from a contract, agreement and quotation in that it does not imply that the other party will sign and agree in writing to it. In its widest sense, it is merely a statement of values and procedures.

[see query in the LB – page 57]

On the other hand, an insurance policy is closer to a contract or agreement because it states the terms under which the possessions or person will be insured. If the individual agrees to these, he/she will be bound by them as regards insurance of assets, health or life.

#### Suggested assessment

Method: Self-assessment and answers by students

Form: Homework/class work

Tool: Students compare their answers with the rest of the class and mark the question according to the suggested answers.

### Activity 22: Helping clients with their reservations

Student's Book page 57  
T2 SO2 LO2

#### Guidelines

This activity revises and sums up much of the information dealt with so far and so goes further than merely recording cancellations and changes.

Students will have to refer to examples in the textbook and consult the GSA.

#### Answers

1. Refer to Pam's letter to Mr Bond as an example of the layout and approach. Letters should clearly state all relevant details (hotels, rates, etc.) and should be in the middle price bracket (approximately three stars).

2. Suggested answer: Investigate this type of accommodation by referring to GSA or any other source e.g. Internet or other electronic or paper-based information e.g. brochures. (Refer to unit on reservations.) Prepare another quotation and send it to the Nevertravels.
3. The travel agent will have to contact the airline and cancel the reservation, remembering to note this on the client card. He or she can assist the client by checking the rules and then writing a request for a refund to the airline (but note that this is not guaranteed). An administration fee (approximately R150) is payable by the client to the travel agent – this can be deducted from any refund received, but must be paid even if no refund is given.
4. In some ways this is a trick question as research will show that booking for car hire is made by voucher and the contract is signed on receipt of the car. If any changes are made previous to this, they will entail issuing another voucher. However, in the very unlikely event that changes are agreed to at the collection point, the changes would have to be signed by all parties as described in the textbook.

### Suggested assessment

Method: Self-assessment and answers by students

Form: Homework/class work

Tool: Students compare their answers with the rest of the class and mark the question according to the suggested answers.

# Unit 7: Storage and retrieval systems

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 23	T2 SO5 LO1
Activity 24	T2 SO5 LO5
Activity 25	T2 SO5 LO1, T2 SO5 LO5
Activity 26	T2 SO5 LO5
Activity 27	T2 SO5 LO1
Activity 28	T2 SO5 LO1
Activity 29	T2 SO5 LO3–13

### Activities 23 and 24: Class discussion

Student's Book page 61, 63  
T2 SO5 LO1, T2 SO5 LO5

### Guidelines

This is a brief class discussion to summarise what has been learnt about the procedure to be followed when filing. It is designed to make the students aware of the purpose of, and rationale behind systematic filing.

### Suggested answers

Any answers which emphasise the efficiency of the procedure and the fact that following a step-by-step approach is logical, time-saving and prevents loss and poor organisation of documents.

One should guard against being prescriptive, but it is hoped that the students will reach some of the answers given later in the textbook e.g:

1. An effective filing system has the following advantages:

- It saves *money* because documentation can be easily found.
- It leads to *standardisation of policies and procedures*. This enables everyone to know how to retrieve information.
- It *controls records* and so promotes *greater efficiency* in offices.
- If there are *clearly defined responsibilities* in connection with filing and record-keeping procedures, *time* can be saved and *efficiency* increased.
- *Continual investigations* into filing, archiving and disposal of documents contribute towards keeping office procedures *up-to-date and streamlined*.

2. Any of the standard filing systems can be discussed, depending on the students' findings.

Note any unusual or original answers and discuss these with the class, giving credit to the student for the extra insight.

### Inclusive education

Hearing-impaired students should be seated in a position where they can follow the discussion, possibly by lip-reading. They should also be assisted with hearing aids or sign language if such facilities are available. The educator should repeat the main points clearly and write these on the board if it is apparent that these students are not following the discussion.

### Suggested assessment

Method: Individual or Group

Form: Report back to class

Tool: Oral presentation

### Activity 25: Discuss vertical filing

Student's Book page 64  
T2 SO5 LO1, T2 SO5 LO5

### Suggested answers

1. Vertical filing is popular because it makes documents easy to locate. It is also a neat, orderly method and is easy to operate.
2. Filing cabinets can be cumbersome and take up space.
3. Vertical filing is generally preferable to horizontal filing, but horizontal filing can be used when only a small number of documents is involved e.g. documents on a desk surface, 'in' tray or 'out' tray or in a drawer. (Accept any plausible answer.)

### Inclusive education

Hearing-impaired students should be seated in a position where they can follow the discussion, possibly by lip-reading. They should also be assisted with hearing aids or sign language if such facilities are available. The educator should repeat the main points clearly and write these on the board if it is apparent that these students are not following the discussion.

**Suggested assessment**

Method: Group

Form: Discussion

Tool: Oral presentation

**Activity 26: Discussion**

Student's Book page 65  
T2 SO5 LO5

**Guidelines**

This is a very brief discussion to encourage students to think of the answer without having to learn it 'parrot fashion'. Students could write down the answer for reference purposes once they have provided it in the discussion.

**Suggested answer**

The tubular filing or storage method is used for documents such as certificates, diplomas, degrees and draughtsman's drawings e.g. building plans. This method prevents damage to the document (which is usually either valuable or too large or fragile for another filing method).

**Inclusive education**

Hearing-impaired students should be seated in a position where they can follow the discussion, possibly by lip-reading. They should also be assisted with hearing aids or sign language if such facilities are available. The educator should repeat the main points clearly and write these on the board if it is apparent that these students are not following the discussion.

**Suggested assessment**

Method: Group

Form: Discussion

Tool: Oral presentation

**Activity 27: Arrange in alphabetical order**

Student's Book page 67  
T2 SO5 LO1

**Guidelines**

This activity is designed to give students practise in arranging names alphabetically. Depending on the circumstances, the exercise can be timed and a small 'prize' can be awarded to the student who completes the exercise correctly in the shortest time. Another variation would be to write the names on cards or sheets of paper and ask students to arrange them alphabetically. This would require a certain amount of photocopying and preparation as each student would need a set of cards, but would have the advantage of being similar to an actual office situation.

**Answer**

Alberts, L

De Wet, C

Dlamini, N

Dlamini, S

Erasmus, P

Ferreira, J

Hamilton, A S  
Macleod, Celeste Anne  
Marais, B  
Moonsamy, F  
Moutaung, Kagiso  
Msimang, Thembu  
Ndlovu, B  
Nolte, Gudren  
Padayachee, Ramani  
Pretorius, Johannes Jacobus  
Rylands, Rowayda  
Suliaman, B  
Utley, D B  
Venter, M C

#### **Inclusive education**

Names would have to be printed out in large letters for students with sight impairments, or, in extreme cases, Braille copies would have to be arranged if at all possible.

#### **Suggested assessment**

Method: Self-assessment, but initially checked by educator if competition approach is chosen.

Form: Class work.

Tool: Students compare their answers with the rest of the class and mark the work according to the suggested answers.

### **Activity 28: Colour coding**

Student's Book page 69  
T2 SO5 LO1

#### **Guidelines**

Once again, have a very brief class or group discussion. The idea is to encourage students to think for themselves – the answer is easy and obvious, so should not be laboured.

#### **Answer**

1. Because files with the same colour are grouped together, it is easy to see when a file has been misplaced (filed in the wrong place).
2. provide answer

#### **Inclusive education**

Hearing-impaired students should be seated in a position where they can follow the discussion, possibly by lip-reading. They should also be assisted with hearing aids or sign language if such facilities are available. The educator should repeat the main points clearly and write these on the board if it is apparent that these students are not following the discussion.

Concessions should be made for students with sight impairments or who are colour-blind, but they should be able to understand the basic principle of colour coding, provided this is explained clearly and with the limitations and challenges faced by these students in mind.



### Suggested assessment

Method: Group

Form: Discussion

Tool: Oral presentation

### Activity 29: Design a filing system

Student's Book page 78  
T2 SO5 LO3–13

#### Guidelines

This is a practical exercise which should test the knowledge and skills gained so far. Each system should be considered individually and evaluated according to its suitability to the given situation. There is obviously no ideal system which can be applied to all situations. This activity could constitute a final assessment for this unit and can be included in the PoE.

#### Suggested answer

As stated, there is no model answer. Students should be evaluated in terms of their ability to design a system which:

- takes into account the needs of the organisation
- meets the criteria for an effective filing system.

#### Inclusive education

Hearing and sight impaired students would need some assistance in preparing and listening to presentations (as described above). Students with mobility problems may need help with transport if they wish to carry out off-campus research.

#### Suggested assessment

Method: Performance-based

Form: Presentation and report back to class and written report. Rubrics: Rubric for presentation as well as 4- point scale for subject knowledge. (Refer to outcomes for this unit)

Tool: Written and oral presentation, including model

# Unit 8: Recording and storing information

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 30	T2 SO5, T2 SO6

### Activity 30: Research assignment

Student's Book page 81  
T2 SO5, T2 SO6

### **Guidelines**

This assignment is designed to encourage students to apply the theory presented in this unit to specific examples in the tourism industry.

### **Suggested answers**

1. Specific answers would be based on the particular document chosen, but reasons for recording information should be:

- ease of access
- permanent record to refer to in the case of queries or problems
- safekeeping of valuable documents and information
- permanent record of customer history.

(Accept any 4 feasible answers)

(4x2=8 marks)

2. This would depend on the documents chosen by the student. Examples could include:

- client cards (personal information e.g. ID, passport numbers, bookings made, history e.g. meal preferences etc.)
- electronic records of bookings (airline reservations, accommodation, car hire or transport etc.).

Information would include examples of the type of information in brackets above. Accept other relevant information such as Frequent Flyer status, credit or debit card numbers, bank details etc. (5 marks)

3. Three ways that records can be created are:

- electronically – using centralised systems such as Galileo, Amadeus, Wordspan
- client cards
- other documentation created electronically using word-processing packages of the particular organisation and stored electronically or as hard copies (or both).

(3 x 2 = 6 marks)

Total = 25 marks

Suggested pass mark –15 marks

4. provide answer

### **Inclusive education**

Special arrangements should be made for sight-impaired students – large print or Braille – to ensure that they can read the assignment. Students with mobility problems should be assisted with transport if field work is undertaken and those with hearing difficulties would need to be assisted by means of sign language if interviews with members of the tourist industry take place.

### **Suggested assessment**

Method: Performance-based

Form: Research project

Tool: Marking memorandum as indicated by mark allocation above. Project is to be recorded on portfolio assessment sheet for internal assessment.

# Chapter 3: Using the telephone

## About this chapter

The table below outlines the work covered in this chapter.

### Chapter 3: Using the telephone

Unit 9: Telephone calls	Unit 10: Information sources and other services
<ul style="list-style-type: none"> <li>• The importance of telephone calls</li> <li>• Good telephone manners</li> <li>• Incoming calls</li> <li>• Outgoing calls</li> <li>• National and international calls</li> </ul>	<ul style="list-style-type: none"> <li>• Finding telephone numbers</li> <li>• Other telecommunication services</li> <li>• Teleconferencing</li> <li>• Practical hints</li> <li>• Telephone answering and recording machines</li> <li>• Pagers</li> <li>• Cellular telephones</li> </ul>

Learning outcomes covered? See chapter 1

## Unit 9: Telephone calls

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 31	T3 SO7 LO4
Activity 32	T2 SO7 LO17
Activity 33	T2 SO7 LO11, T2 SO7 LO15
Activity 34	T2 SO7 LO12
Activity 35	T2 SO7 LO7
Activity 36	T3 SO7 LO6
Activity 37	T3 SO7 LO5–17
Activity 38	T3 SO7 LO4

### Activity 31: It's easier face to face!

Student's Book page 85

**Guidelines**

The purpose of the activity is to emphasise that telephone conversations differ from face-to-face communication because the communicators cannot see each other and facial expression and body language cannot be used as part of the communication.

**Suggested assessment**

The students can assess their peers during this pair activity. Let students take turns assessing each other's performances. The class can prepare a checklist or rubric that contains details about effective verbal communication. Then allow students to use the checklist or rubric to assess each other's performances.

**Activity 32: Getting to know the switchboard**

Student's Book page 89  
T2 SO7 LO17

**Guidelines**

This is a practical activity that students must do at an agency or other tourist office. Seeing that companies have different switchboards, it is not practical to discuss all the different types here. Ask the students to report back on their experience when they are back in the class. You can use this report for assessment purposes.

**Suggested assessment**

Method: Performance based

Form: Report

Tool: Rating scale

**Activity 33: Please hold the line!**

Student's Book page 91  
T2 SO7 LO11, T2 SO7 LO15

**Guidelines**

This is a very common, real-life situation which students will encounter daily in the course of their working lives. Deciding whether to transfer a call or take a message should become 'second nature' to them in the busy environment in which they will work. It must be emphasised that at no time should a client be left waiting for longer than two minutes (maximum) without advising them of the status of the call.

**Answer**

This is the best way to cope with this situation:

Cathy: Thandi's line is busy, would you like to hold for a little longer or shall I take a message?

Caller: I will hold for a little while, thank you.

After a short wait, Cathy should go back to the caller, and let him or her know that Thandi's line is still busy and offer to take a message. It is possible to offer to transfer the call to another consultant, but it should be remembered that it is Thandi who is dealing with the quotation and it would probably be better if a message is taken. Cathy would have been able to assist if there had been some record available, it is unlikely that another consultant will be able to assist either. The client can be given the choice, however.

### **Inclusive education**

Make the same arrangements for hearing impaired students as discussed previously in this book.

### **Activity 34: Taking messages**

Student's Book page 93  
T2 SO7 LO12

#### **Guidelines**

You will need copies of telephone message forms for this activity. It is advisable to copy more than one per student, if possible, in case of errors.

This is not the only message form used – it might be a good idea to point this out to the students and do more exercises using different forms. It must be noted that all message forms require the same basic information.

The educator can take these messages in, mark them, and then give oral and written feedback to students. Or each student can mark his or her own (or a peer's message) using a transparency prepared by the educator.

#### **Answer**

(Date, time and telephone number can be invented but must be included.)

TELEPHONE MESSAGE FORM

DATE: 10 April 2007    TIME: 14:00    (Date – 1 mark; Time – 1 mark)

FOR: Thandi (surname can be added-optional) (1 mark)

FROM: Mrs Jones (2 marks)

TELEPHONE NO: (Any telephone number – 10 digits now required) (1 mark)

MESSAGE: Please contact Mrs Jones regarding the quotation for the trip to Russia (3 marks – information must contain name of caller, quotation, trip to Russia – deduct a mark if unnecessary information is included – message should contain all necessary information, but should be concise.

MESSAGE TAKEN BY: Cathy (1 mark)

Total – 10 marks

### **Inclusive education**

Message forms and transparency will have to be enlarged to accommodate students with sight impairments.

#### **Suggested assessment**

Method: Performance-based

Form: Class work

Tool: Written presentation marked according to the suggested answer.

### **Activity 35: Role play**

Student's Book page 94  
T2 SO7 LO7

#### **Guidelines**

These are role-play exercises to give students the 'feel' of a real-life telephonic conversation and provide valuable practise in dealing with difficult situations in a relatively non-threatening

environment. Having built up confidence in the first exercise, students are presented with a more challenging (and more realistic) role-play in the second, unrehearsed situation.

### Answers

There are no set answers. Students should create as realistic a situation as possible and should respond to the abusive caller as calmly and professionally as indicated in the notes.

### Inclusive education

Students with hearing impairments will have difficulty in participating in this exercise (and, unfortunately will experience problems with telephone conversations in the business world). In the classroom situation, lip-reading can be allowed as it is the *technique* of dealing with difficult customers which is being assessed. Hearing aids can also be used, if available.

### Suggested assessment

Method: Group

Form: Class work

Tool: Oral presentation

## Activity 36: Using the airline alphabet

Student's Book page 97  
T3 SO7 LO6

### Guidelines

It is extremely important that students become familiar with this internationally-used alphabet and learn to use it with ease and confidence. Many travel agents complain that students sent to them cannot use this alphabet and some do not even know about it!

For this reason, it is highly recommended that more than one exercise is given to the students, and that further role-plays incorporate the airline alphabet. Students must become so familiar with it that they should no longer have to refer to the notes.

### Answers

Please see the alphabet given in the textbook. Answers will depend on the names chosen.

### Inclusive education

The alphabet can be enlarged for students with sight problems. A large poster can be designed and put up in a prominent place in the classroom – this will assist other students as well. Role-play for students with hearing problems should be face-to-face not a simulated telephone conversation. This will facilitate lip-reading. If necessary sign language (possibly with the assistance of an interpreter) can be employed.

### Suggested assessment

Method: Self-peer assessment

Form: Class work

Tool: Oral presentation

## Activity 37: Telephone role-play

Student's Book page 98  
T3 SO7 LO5–17

### **Guidelines**

This is a scenario which is acted out in what is known as a 'fish bowl setting' i.e. where two or more students take part in a role-play, observed by the rest of the class, who makes notes and then gives feedback. This is a useful exercise for teaching telephone technique in a realistic, although simulated environment, but care must be taken to ensure that feedback is relevant and that negative personal remarks are avoided. It is necessary to set ground rules of this nature before the activity and to ensure that these are adhered to.

### **Suggested answers**

There are no definite answers, but the correct approach will be informative, polite, diplomatic and understandable to the caller. A plausible, possible solution to the problem should be suggested.

In an ideal situation, observers would answer 'yes' to all the questions, but should be encouraged to elaborate on their answers (whether they answered 'yes' or 'no').

### **Inclusive education**

Special arrangements should be made for students with hearing impairments, as discussed previously in this book.

### **Suggested assessment**

Method: Group

Form: Observation sheet

Tool: Oral presentation

## **Activity 38: Making an international telephone call**

Student's Book page 101  
T3 SO7 LO4

### **Guidelines**

The purpose of this activity is to determine whether the student is able to put the information given into practise in an actual situation. The educator can add more, similar exercises if time permits.

A map showing the different time zones would be of great assistance here. You may need to point out that Orlando is in Florida if you think that students need a clue in order to make the exercise easier.

### **Suggested answer**

Refer to the following notes:

In the travel business, you will often have to make international calls (or calls to other countries). This is done by:

- looking up the correct dialling code in the front of your directory
- dialling the code
- dialling the person's number.

To dial overseas direct, you will need to dial the following:

- the country code + the area code + the subscriber's number

Don't forget that there are time differences between South Africa and many other countries. It is important to bear this in mind when telephoning other countries, especially the places like the

United States and Australia where the differences are great. You will find the time differences in the front pages of your directory. Remember to consult these before making a call – it is not a good idea to wake up a client or important business associate in the middle of the night.

In this case, the employee will dial 091+407+ subscriber's number.

*Please note that this answer is correct according to the Western Cape Telephone Directory of 2006–2007 and that codes for the USA change frequently. It would therefore be necessary to check the code current at the time of doing this exercise.*

Time difference – 6 hours

#### **Inclusive education**

Students with sight impairments will need assistance in referring to the telephone directory. They could be tested orally by reading the index of the directory to them and then reading any other requested information, taking care not to ask 'leading questions' which would give them the answer without their working out how to find it for themselves.

#### **Suggested assessment**

Method: Self- assessment

Form: Homework/ class work

Tool: Students mark their own work according to the model answer

# Unit 10: Information sources and other services

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 39	T3 SO7 LO3
Activity 40	T3 SO7 LO3
Activity 41	T2 SO4 LO4
Activity 42	T3 SO7 LO3
Activity 43	T3 SO7 LO3

### Activity 39: Test your knowledge

Student's Book page 103  
T3 SO7 LO5

#### **Guidelines**

In this activity, students should be given time to write the answers down individually before sharing them with the rest of the class in a general discussion. This will give an opportunity for



introspection before hearing other answers.

### **Suggested answers**

1. To find telephone numbers and to give information on telephone services such as maintenance, enquiries etc. Also to give emergency numbers. (Accept any extra plausible points.)
2. Emergency numbers (accept examples), information pages (student can give examples such as national and international codes, call charges, enquiries etc.), alphabetical listings.

### **Inclusive education**

Once again, students with sight impairments will need assistance in accessing the directory and may need someone to read the headings to them. Alternatively, index pages and other relevant material can be enlarged for them. It may be worthwhile to find out if Braille directories exist for your area and request one of these from TELKOM.

### **Suggested assessment**

Method: Self-assessment and answers by students

Form: Class work

Tool: Students compare their answers with the rest of the class and mark the questions according to the suggested answers.

## **Activity 40: Class discussion**

Student's Book page 103  
T3 SO7 LO3

### **Guidelines**

The purpose of this very brief activity is to encourage respect for the privacy of others and to sensitise students to these needs as well as to indicate how to cope with them.

### **Suggested answers**

The general answer is that a person requests an unlisted number in order to protect his or her privacy and ensure that only those persons to whom he or she gives the number will be able to contact him or her.

There could be a number of reasons for this – professionals not wishing to be contacted at home, the elderly or individuals living alone who do not wish to be harassed by unwelcome callers etc. Accept any plausible answer and encourage lively debate and speculation.

If you want to contact the person, you would not be able to obtain the number from number enquiries as these employees would face disciplinary action if they gave you an unlisted number. Therefore, it is not fair to put pressure on them to do so. The only solution is to contact the person some other way – by letter or by a personal visit if you know the address (but be careful here – the whole idea is that the person should know you so well that he or she does not mind your knowing details of his or her address. (He or she would resent your arriving on his or her doorstep unless you were a trusted friend or colleague!) The only way you should obtain an unlisted number is by requesting the owner of that number to give it to you.

### **Inclusive education**

Assistance would have to be given to students with hearing impairments as mentioned previously.

### **Suggested assessment**

Method: Group

Form: Class work

Tool: Oral presentation

### **Activity 41: Using a telephone directory**

and

### **Activity 42: Tourism directories**

Student's Book page 103, 104  
T2 SO4 LO4, T3 SO7 LO3

### **Guidelines**

The purpose of this activity is to draw the students' attention to directories for the tourism industry and to the GSA in particular.

### **Suggested answer**

The GSA and Travelinfo must be mentioned, but other local directories, if any, can be mentioned. Please refer to the suggested publications at the beginning of this guide. Also refer to the following notes as found in the Student's Book.

#### **Other sources of information used in the travel industry**

In the travel industry, a very important source of telephone numbers is Travel-info. This is a programme which is available to all travel agents.

One can find the telephone, fax, and e-mail addresses of all airlines which subscribe to Travelinfo, as well as hotel groups and car hire companies.

Another extremely valuable source of information is the GSA.

When you have to telephone for authorisation for an air ticket, you first have to check in the GSA or Travelinfo and look up the bank which gives authorisations for the airline you need.

Don't phone the passenger's bank! For example, should you need an authorisation for Singapore Airlines and you phone FNB, they will refuse to give an authorisation. This is why it is important to check in your GSA. Nedbank is the only bank which will give an authorisation code for Singapore Airlines.

You will find the telephone numbers for authorisations for the various banks in your GSA Travelinfo.

### **Inclusive education**

The same concessions and assistance for sight and hearing impaired students as mentioned earlier in the book will apply here.

### **Suggested assessment**

Method: Self assessment and answers by students

Form: Homework

Tool: Students compare their answers with the rest of the class and mark the questions according to the suggested guidelines.

### **Activity 43: Using the GSA**

**Guidelines**

This exercise can be done separately or in conjunction with the other exercises in the addendum at the back of the book. It is essential that students are able to use the GSA as they will use this reference every day in the working environment. It is a source of grave concern that travel agents complain loudly and constantly about the inability of students to use this reference. Please ensure that students can use the GSA confidently at the end of the course. More exercises can be developed if possible.

If students have not been issued with their own copies of the GSA, old copies can usually be obtained at local travel agents.

**Suggested answer**

This would depend on the issue of the GSA which is being used. Ensure that the figure includes insurance.

**Inclusive education**

The same concessions for sight-impaired students as mentioned previously apply – sections of the GSA can be enlarged for these students.

**Suggested assessment**

Method: Self-assessment and answers by students

Form: Homework

Tool: Students compare their answers with the rest of the class and mark the questions according to the suggested guidelines.

# Chapter 4: Product knowledge and reservations

## About this chapter

The table below outlines the work covered in this chapter.

Chapter 4: Product knowledge and reservations		
Unit 11: Know your product	Unit 12: From supplier to client	Unit 13: Making reservations
<ul style="list-style-type: none"> <li>• The importance of knowledge</li> <li>• General knowledge</li> </ul>	<ul style="list-style-type: none"> <li>• The importance of good knowledge of services and facilities</li> <li>• Good client service</li> </ul>	<ul style="list-style-type: none"> <li>• Reservation systems</li> <li>• Types of reservations</li> <li>• Special requests</li> <li>• Form of payment</li> <li>• Recording and storing information</li> <li>• Additional services</li> <li>• Dealing with unexpected situations</li> </ul>

Learning outcomes covered? – see chap 1

## Unit 11: Know your product

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 44	T4 SO1 LO1
Activity 45	T4 SO1 LO1

### Activity 44: Which magazines are available?

Student's Book page 117  
T4 SO1 LO1

### Guidelines

It is important for students to be aware of the publications on the market and to keep pace with new magazines and sources of reference, including those read by the clients, otherwise business will be lost if the agent is more ignorant than the customer. This is particularly true today, when it is so easy to make an electronic booking on the Internet that travel agents are becoming redundant. The only reason why a client will make a reservation with an agent is that the agent can advise him or her as a result of greater product knowledge. This cannot be emphasised too strongly to those students who wish to work in travel agencies.

### Suggested answers

These will depend on the magazines mentioned. A list has been given in the introduction to this guide, but this is far from exhaustive. Students should be encouraged to look for new magazines as well as the 'old favourites' like *Getaway* and must be able to identify the target group (age, interests etc.). Notes on various types of tourists discussed in the various textbooks comprising this course as well as a discussion of Maslow's hierarchy of needs would help here.

### Inclusive education

Students with mobility difficulties will need assistance with transport to the store and help in the store itself. Try and find a wheelchair-friendly shopping centre.

Students with sight impairments will need to have sections of the magazines read to them or enlarged. If Maslow's hierarchy or any other system of assessing needs and target groups is explained, make sure that the diagram is large enough for these students to see it.

Hearing impaired students will also benefit by graphic presentation on the board or OHP and fellow students should be encouraged to make visual aids when reporting back to the class.

### Suggested assessment

Method: Self assessment and answers by students

Form: Homework/fieldwork

Tool: Oral/written presentation

### Activity 45: Know your facts!

Student's Book page 118  
T4 SO1 LO1

### Guidelines

This is a humorous, tongue-in-cheek activity demonstrating, by means of a rather exaggerated example, the effect that an agent's lack of general knowledge can have. In light of the forthcoming FIFA Soccer World Cup, it is important that employees in the tourist sector know their own country and show some knowledge and understanding of the countries of the guests.

### Suggested answers

1. There is no model answer, but the conversation could have gone something like this

**Tourist:** We have heard of the famous Waterfront, but where can we go to find a trip to Robben Island where one of your presidents was imprisoned?

**Agent:** Yes, the Waterfront is very popular and I have good news for you – that's where you can find a ferry to take you to Robben Island where Nelson Mandela was imprisoned. It leaves from the Nelson Mandela Gateway near the Clock tower – I can give you a map of the Waterfront if you like.

**Tourist:** Is that near those famous botanical gardens – we saw their plants at the Chelsea

Flower Show?

**Agent:** You must be talking about the Kirstenbosch Gardens – they did have a beautiful exhibition at Chelsea this year. No, they are on the other side of Table Mountain – we can give you a roadmap. Do you come from England?

**Tourist:** No, we travelled to Chelsea from Berlin – that’s where we come from. We used to live near the Berlin Wall and of course it’s so much better now that the Wall is down.

**Agent:** Yes, it must have been terrible to live in a divided city. And of course one never hears about the Iron Curtain now that there are no more restrictions and one can move freely throughout Europe. I hope you have a wonderful time in South Africa as well.

2. They would have got hopelessly lost (students can go into detail if they like). They would have gone to the other side of Cape Town in search of Bloubergstrand and would have found out that the ferry didn’t leave from Blouberg anyway! It is to be hoped that they didn’t go all the way to Blouberg when they discovered where it was!

They would have been annoyed at the inconvenience and also amazed at the ignorance of the agent.

3. Chelsea Flower Show – annual world famous international flower show held at Chelsea in England (students can give more detail)

Berlin Wall – built by Russia in 1961 to stop the flow of refugees and jobseekers from the Communist-held East Germany to West Germany which was ceded to the Allied Forces after WWII. The Wall was demolished in 1991 and Germany was re-united (more detail can be given if students wish).

Iron Curtain – a symbol of the restriction on travel, movement etc. imposed by Russia during the Cold War (the hostile relationship between Communist Russia and the ‘West’).

4. Any plausible answer – see previous notes – also reading newspapers, listening to and watching news, documentaries, etc.

### **Inclusive education**

Ensure that hearing-impaired students are included in the discussion by being in positions where they can lip-read, by summarising clearly and by using visuals. You could write an ‘ideal’ conversation on the board at the end of the session and show pictures of some of the places and historical events.

### **Suggested assessment**

Method: Self-reporting and answers by students

Form: Case study

Tool: Written presentation assessed according to suggested solutions

# Unit 12: From supplier to client

### **Unit outcomes**

<b>Activity</b>	<b>Topic, Subject Outcome and Learning Outcome</b>
Activity 46	T4 SO1 LO2

Activity 47	T4 SO1 LO2
Activity 48	T4 SO1 LO1
Activity 49	T4 SO4 LO4
Activity 50	T4 SO1 LO4
Activity 51	T4 SO4 LO1
Activity 52	T4 SO4 LO4
Activity 53	T4 SO4 LO3
Activity 54	T4 SO4 LO6, T4 SO4 LO1

### Activity 46: Planning a dream holiday

Student's Book page 120  
T4 SO1 LO2

#### Guidelines

This is a 'fun' activity designed to stimulate the students' imaginations and to help them become more engaged with the reservation process by relating their own imaginary trip to the dreams and expectations of others – in this case, the tourists they will deal with.

#### Suggested answers

Definitely no 'model' answers here! Students must be encouraged to use their imaginations and be receptive to other students' dreams. Try to encourage them to involve as many sectors of the tourist industry as possible in preparation for the next activity.

#### Inclusive education

Hearing impaired students should be accommodated in the discussion as previously described.

#### Suggested assessment

Method: Self-assessment

Form: Class work

Tool: Students share and discuss their answers.

### Activity 47: Research

Student's Book page 120  
T4 SO1 LO2

#### Guidelines and additional information

It will be necessary to explain what is meant by a distribution channel (suppliers/manufacturers distribute to wholesalers who distribute to retailers who distribute to consumers). Use an example of food/clothing (or any other) industry to explain the function or role of suppliers, wholesalers and retailers. (You can draw a simple diagram to illustrate the flow of the product from supplier to consumer.) Once students understand the concept of a distribution channel, they can complete the activity.

#### Suggested answers

1. Students could work in groups to plan the flow chart and present it to the rest of the class on large sheets of paper. The class can use a checklist to assess each flow chart. The checklist should include all the principals, intermediaries and the providers of support services.

- Students should also decide whether the direction of each arrow is correct (from principals to tour operators and conference organisers, to retailers, to consumers, with support services feeding into each role player).
2. Any of the ideas given in the previous section e.g. 'educationals', workshops, indabas, reading, watching documentaries, referring to updated tourism – specific sources e.g. GSA. Travelinfo, magazine etc.

### **Inclusive education**

Arrangements should be made to accommodate hearing-impaired students during the discussion (as previously mentioned). Enlarge the chart for students with sight impairments.

### **Suggested assessment**

Method: Performance-based

Form: Homework/class work

Tool: Students mark their work according to suggested answers

### **Activity 48: Worksheet on case study**

Student's Book page 123  
T4 SO1 LO1

### **Guidance and additional information**

You can provide the students with examples of bad experiences or service delivery on a tour, and also ask them to give examples from their own experiences. Emphasise the critical importance of service delivery.

### **Suggested answers**

1. Governmental, accommodation, transport, entertainment, restaurants, health and safety.
2. Some points to be noted could be:
  - Travel agent – co-ordinates and confirms all reservations, gives advice on possible trips and destinations, arranges visas if necessary and travel documentation etc. Tour operators – ensure bookings are accurately recorded, special arrangements noted etc.
  - Transport sector e.g. car hire company – all bookings to be accurately noted and information given to the agent and tourist correct and up to date.
  - Hospitality industry – reservations must be accurate, no clashes of booking arrangements, tourist must be welcomed and dealt with courteously and efficiently, no delays. Special requests and needs must be recorded and dealt with promptly.
  - Auxiliary services – must deal with requests promptly, efficiently and courteously. It is very important that documents such as passports and visa applications are dealt with quickly to prevent delays and inconvenience to the tourist and to dovetail with other arrangements.

### **Inclusive education**

This is a written exercise, so arrangements should be made as previously discussed for students with sight impairments. The exercise could be done orally by these students if the educator has time to arrange a private session with them.

Arrangements should be made to accommodate hearing-impaired students during the feedback discussion (as previously mentioned).



### **Suggested assessment**

Method: Self-assessment and answers by students

Form: Homework

Tool: Students compare their answers with the rest of the class and mark their answers according to suggested solutions or teacher takes in answers for marking and gives feedback session.

### **Activity 49: Class discussion**

Student's Book page 123  
T4 SO4 LO4

#### **Guidelines**

This is a fairly informal class discussion to emphasise the importance of good customer service. The discussion can be initiated by asking students the questions asked in the paragraph above this activity and by encouraging them to share their own experiences and anecdotes.

#### **Suggested answers**

This is an 'open' answer – accept any plausible opinion. Students should substantiate their answers by reference to examples. This can be a 'brainstorming' exercise, with the educator writing points made on the board as the students mention them. Please ensure that you set a few ground rules at the beginning – students should not shout out at once, for example, but be allowed to speak one at a time!

Any sensible answers – the reason why clients still use travel agents is for their product knowledge and their ability to co-ordinate reservations and give advice.

#### **Inclusive education**

It is important to make sure that students with hearing problems do not feel confused and 'lost' during the discussion, particularly if it takes the form of a brainstorming session. Points should be written clearly on the board – this will also help students with sight problems. Even though this is technically a brainstorming exercise, try to encourage these students to participate by asking them direct questions at some stage of the discussion.

### **Suggested assessment**

Method: Peer

Form: Report back to class

Tool: Brainstorm/ oral presentation

### **Activity 50: Dealing with clients**

and

### **Activity 51: Think about good service**

Student's Book page 124, 125  
T4 SO1 LO4, T4 SO4 LO1

#### **Guidelines**

These activities are designed to encourage students to realise that it is important to make reservations or attend to queries both quickly and accurately – in other words, quality should not be sacrificed for speed and vice versa. This would seem to be obvious, but problems of this nature often occur in practice. It is only through experience that employees gain skills of speed

combined with accuracy, but at this stage it is important to make them aware of the importance of these skills and that there can often be a problem trying to achieve a balance. Do not labour the point too much – try to keep the discussion as brief as possible. The questions are given merely as pointers for discussion.

### **Suggested answers**

There are no model answers. The questions are aimed to stimulate discussion.

The ideas which should emerge are that clients do not want delays or slow service because they do not wish to spend a long time on the reservation process – they want to get to their destinations with the least amount of fuss! However, if reservations are inaccurate, the client can be seriously inconvenienced and this will cause even more frustration.

Some examples of inaccurate reservations where accuracy could have been sacrificed in favour of speed would be those caused by the inaccurate recording of names, destinations, details of travel arrangements (including special arrangements), agent not checking on visa requirements etc.

This could have many unpleasant consequences such as:

- Passenger booked on incorrect flight
- Passenger denied boarding because the name was incorrectly spelt
- Special arrangements not recorded – especially problematic when a wheelchair is needed, for example
- Passenger stranded for hours at an airport
- Passenger misses connecting flight due to the agent not checking times correctly
- Problems with tour bookings and car hire due to incorrect information and information not being carefully recorded and checked.

An example of reservations made accurately but not quickly could be irritating delays at booking counters while an agent laboriously checks and double-checks everything. This would annoy the clients and give the impression of incompetence on the part of the agent. In extreme cases, it may also result in a passenger missing a flight or some other transport if checking reservation details takes too long. There are also other delays, for example if the agent is too slow in following up on visa and other requirements or problems and in giving feedback to the client. This could cause the entire trip to be cancelled!

### **Inclusive education**

The same consideration for students with hearing problems as discussed earlier in this book should apply during the group work and subsequent class discussion.

As mentioned, during the report back session points should be written clearly on the board – this will also help students with sight problems.

### **Suggested assessment**

Method: Individual

Form: Report back to class

Tool: Oral presentation

## **Activity 52: Internet research**

and

### Activity 53: Assisting clients

Student's Book page 127, 128  
T4 SO4 LO4, T4 SO4 LO3

#### Guidelines

Note: The information obtained in Activity 52 can be used to answer the questions in Activity 53.

It is important that students are computer-literate and know how to find travel-related information on the Internet. All computer-based exercises in this textbook should be done in conjunction with the computer training received in this course. Please consult with the computer teacher or lecturer and schedule some classes together (cross-curricular activities). If necessary, all activities requiring the use of a computer can be dealt with in these classes, so it will not be necessary to do an activity like this in isolation.

Team teaching is a good idea and the computer teacher could use this exercise to demonstrate how to 'surf' the net.

#### Suggested answers

Many sources can be used to obtain this information. The computer teacher/lecturer can assist here.

Some sources are:

- Travelinfo.co.za
- Google
- Galileo, Amadeus. Wordspan
- An example of a website advertising a particular hotel chain is choicehotels.com (a website for Choice Hotels, most likely only in the USA – students can find more websites giving information about hotel groups.
- <http://www.travelzoo.com> – lists the 'top 20' hotels. A free subscription can be taken out.
- The GSA also gives GDS booking codes which can then be accessed electronically.
- Any answers are acceptable as long as the hotels are in a central location.

#### Inclusive education

Please consult your colleague regarding specific needs of students with sight, hearing and mobility problems when using the computer. The screen should be enlarged for students with sight impairments, for example. There are also special Braille and voice-sensitive machines which can be purchased for them, if funds permit.

#### Suggested assessment

Method: Performance-based

Form: Class work

Tool: Written presentation

### Activity 54: Talk about communication

Student's Book page 129  
T4 SO4 LO6, T4 SO4 LO1

#### Guidelines

This is an intercultural activity. As well as thinking about 'foreign' names, students can also be encouraged to consider names from South African cultural groups other than their own.

### Suggested answers

These will depend on the examples given by the students, but some which could be mentioned are:

- Phosa ('ph' pronounced as a 'p' – the same rule applies for all words starting with or including 'ph' in the Nguni languages).
- Also point out the different pronunciations of the 'i' and 'e' sounds e.g. the difference between the English 'ship' and 'sheep' is not easily distinguished by speakers of other South African languages and could cause misspelling of names containing these vowels.
- Other problems – the clicks in Xhosa, for example, can cause difficulties in spelling to those not used to them.
- Afrikaans names like 'van der Westhuizen', 'Oosthuizen', 'Gertruida', etc. can cause problems to speakers of other languages.
- Juanita ('J' pronounced as 'W' – Spanish origin); but Jose (in Spanish 'J' pronounced as 'H' pronounced 'Hohsay' – already given, but can full pronunciation can be discussed).
- In French, final letters and syllables are not often pronounced and there is a great deal of nasalisation, e.g. 'Eliane De Saint-Martin' will be pronounced something like 'Elian De Sang Martang'!

Students can find more.

### Inclusive education

Students with hearing problems would have great difficulty with this exercise and they will have to realise that they will have difficulty with a situation of this nature in the normal working world. Arrangements will have to be made for lip-reading and/or hearing aids. Strategies for handling these situations will have to be worked out and in fact these students should be assisted in working out these strategies. Possibly the best idea would be to ask the speaker to write his or her name down before even attempting to pronounce it! It would not harm these students to participate in this discussion, however, and to note the differences between spelling and pronunciation as indicated on the board.

As noted, make sure that all board work is large enough to accommodate students with sight problems.

### Suggested assessment

Method: Peer

Form: Class work

Tool: Brainstorm/oral presentation

# Unit 13: Making reservations

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
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Activity 55	T4 SO2 LO1–9
Activity 56	T4 SO2 LO2
Activity 57	T4 SO4 LO3
Activity 58	T4 SO2 LO4, T4 SO2 LO6, T4 SO2 LO7
Activity 59	T4 SO4 LO1–5
Activity 60	T2 SO1 LO1
Activity 61	T4 SO2 LO8
Activity 62	T4 SO2 LO1–9
Activity 63	T4 SO4 LO1–5
Activity 64	T4 SO4 LO1
Activity 65	T4 SO4 LO6
Activity 66	T4 SO4 LO4

### Activity 55: Research

Student's Book page 133  
T4 SO2 LO1–9

#### Guidelines

Training will possibly take place in a situation where only one type of reservation system is used, so arrangements must be made to visit another organisation where the alternative system is employed.

#### Suggested answers

These would depend on the type of organisation visited.

Generally speaking, computerised systems would follow the steps listed in Activity x on page x.

If a reservation is completed manually, it would be entered in the register and details confirmed by telephone and fax. A deposit would be requested and a receipt sent to the client.

Manual systems are used when the organisation is small and/or situated in a remote area, with little access to networks etc.

#### Inclusive education

The same arrangements as previously discussed should be made for students with mobility difficulties.

Special arrangements should be made for students with sight impairments (e.g. enlarge pages of guest/client details, adapt computer screens as mentioned).

If interviews or simulation takes place, arrange for sign language interpreter for students with hearing problems, if necessary.

#### Suggested assessment

Method: Task-based

Form: Observation sheet

Tool: Fieldwork, interview and report writing

### Activity 56: Think about the case study

Student's Book page 137  
T4 SO2 LO2

**Guidelines**

Students should be made aware that, although the classification of different types of clients according to age, gender, income etc. is helpful, it could also lead to stereotyping and that each client should be treated as unique. All aspects of a customer's history should be recorded and taken into account – and then it would still be necessary to listen to his/her particular needs for individual trips and not jump to conclusions as happens here.

**Suggested answers**

1. The assumption was that because Mr Khosa was wealthy, he would want to stay in a five-star hotel.
2. The correct facts were that he preferred to stay in a three- or four-star hotel where he could enjoy water sports, good meals and some evening entertainment.
3. Any answer which demonstrates the agent asking Mr Khosa questions about his preferences and not dictating to him or jumping to conclusions will suffice.

**Activity 57: Practical work**

Student's Book page 137  
T4 SO2 LO3

**Guidelines**

The Tour Operator and hotel chosen would depend on the information in the current GSA. e.g. the Coco Hotel would be a good option (see below) – but use own discretion.

**Additional activity**

Below is an example of a letter of confirmation that you could discuss with the students – or ask them to write one first and then provide them with this model. This would also provide a cross-reference to the unit on contracts, quotations, agreements and policies.

## HAPPY TRAVEL

**FOR ATTENTION: MR W KHOZA**

**Fax No 021 7000000**

Dear Mr Khoza

Thank you for calling at the office yesterday, we were all very pleased to see you again. We have much pleasure in providing you with a quotation for you and your family to visit Mauritius in September.

Le Coco Beach

The all inclusive package which we discussed includes, Breakfast, Lunch, Dinner and unlimited local beverages during opening hours of all bars and beach bar Trolleys, unlimited in-room tea and coffee and use of the minibar. Plus a selection of pizzas from the pizza bike and ice cream from the carts during opening hours.

Rate:

Room Type: Standard Family Room

Number of nights 7

Dates of travel: 23–30 September

R... per adult sharing

R./.. per child, 6 + 11 years sharing

The above package includes:

Return economy class airfare ex Cape Town  
Return island transfers (Airport/Hotel/Airport)  
Accommodation as specified  
Meals as specified  
All non-motorised watersports  
Unlimited water-skiing  
Theme evenings and entertainment

The package excludes:

Departure taxes  
All items of a personal nature

Rates are subject to change without prior notice due to currency fluctuations, change in government, airport taxes and airfare or fuel levy increases. As this is a quotation only and no reservations have been made, this offer is subject to availability.

We thank you for allowing us the opportunity to quote for your family holiday in Mauritius. Should you have any queries, please do not hesitate to contact us.

*This quotation is valid for 72 hours.*

South African passports holders do not require a visa to visit Mauritius however please ensure that your passport are valid for at least 6 months after your return to South Africa.

We strongly recommend that you take out insurance against any cancellation or medical risks and we are able to recommend a policy to suit your needs.

Assuring you of our best attention at all times.

Yours sincerely

PAM

### **Inclusive education**

Special arrangements should be made for students with sight impairments as regards enlargement of text, case study, questions and relevant portions of GSA.

### **Suggested assessment**

Method: Self-reporting and answers by students

Form: Case study

Tool: Written presentation assessed according to suggested solutions

### **Activity 58: Discuss the case study**

Student's Book page 150  
T4 SO2 LO4, T4 SO2 LO6,  
T4 SO2 LO7

### **Guidelines**

This is an important activity as it sums up much of the information learnt so far. Most of the activities should be filed in the PoE, but it is particularly important that this revision exercise should be recorded so that the students can refer to it when studying the reservation process.

### **Suggested answers**

- Pam checks her client card which she keeps in a small box close to her. She sees that Mr Clark is a South African Airways Voyager member and that he is the CEO of his Company.
- Pam opens Mr Clark's client profile in her system and proceeds to make the reservation keeping in mind that Mr Clark is a SAA Voyager member.
- Before inserting Mr Clark's name into the booking she checks she has the correct spelling of his name as it appears on his passport, a copy of which she has on file.
- Pam books Mr Clark in Business Class.
- She also requests a window seat and a vegetarian meal.
- She checks in her GSA to see whether there is a public holiday among the three days that Mr Clark will be in Beijing. She sees that the 1<sup>st</sup> of May is a public holiday in China. Pam e-mails Winnie with this information.
- After confirmation from Winnie, Pam amends her reservation for Mr Clark to depart a few days later.
- Next Pam looks in her GSA to check whether Mr Clark will need a visa. She sees that he does and prints out a copy of the visa form and requirements and faxes them to



Winnie.

- Pam then checks the health requirements and notes that a Yellow Fever vaccination is required if coming from/stopping over in an infected area. She doesn't think that this will apply to the area that Mr Clark will be travelling to, but double checks with a travel clinic.
- Pam has also to advise Mr Clark of the additional health recommendations for China e.g. against Polio, Tetanus, Hepatitis A and Malaria. These precautions are not compulsory but the client must be advised.
- She puts all of the above in writing and keeps a copy of the correspondence.
- Pam books accommodation for Mr Clark in Beijing.
- She also remembers to request transfers from the airport to the hotel and back to the airport.
- Once the hotel has been confirmed Pam sends an e-mail to Winnie with details of the itinerary showing departure and arrival times, the fare plus departure taxes, cost of the hotel, health requirements and details of the transfer which has been arranged for Mr Clark.
- Pam must print out and keep a copy of this email on file. She can also save it on her system.
- Pam checks with Winnie that she may go ahead and use the credit card number she has on file to make payment for the above services. (As Mr Clark has made payment by credit card he will receive free travel insurance but Pam encourages Mr Clark to upgrade his insurance to Phase 11 so that he will receive more extensive cover.)
- When all aspects of the reservation are confirmed and finalised Pam will do the following:
  - issue the ticket
  - print out an itinerary showing flight details, hotel name and contact numbers
  - issue an upgraded insurance policy, print out the certificate and attach card with
  - emergency contact numbers
  - check in Mr. Clark's passport that the visa has been issued for the correct dates
  - check that hotel voucher has been issued for correct dates and that transfers are included
- She places all of the above into a wallet and delivers this to Mr Clark's office (she also thanks Winnie for the booking and advises her that the documents are ready and will be delivered).
- She follows up with a call to Winnie after Mr Clark has arrived home to find out whether everything went according to plan. (20 marks – suggested)

2. Pam knows that Mr Clark :

- is a SAA Voyager member.
- is the CEO of his company
- travels Business Class
- requests a window seat and a vegetarian meal.
- likes to stay in five-Star hotels
- prefers a non-smoking room . (6 Marks)

3. She requests a window seat and a vegetarian meal. She reserves a non-smoking room at the hotel. (4 marks) She also remembers to request transfers from the airport to the hotel and back to the airport (hotel's complimentary shuttle service). She includes this in her e-mail to the tour operator. (3 marks) Pam found out that the 1<sup>st</sup> of May was a public holiday and also had some information about the diseases and illnesses which were a potential danger. (2 marks) She sent e-mails and faxes to airlines, hotel and to Winnie. (3 marks) she recorded the information on the

client card and on the computer. (2 marks) **Total- 40 marks**  
A four-point scale can be used for assessment.

**Inclusive education**

Special arrangements should be made for students with sight impairments as regards enlargement of text (case study, questions and relevant portions of GSA).

**Suggested assessment**

Method: Performance-based

Form: Case study

Tool: Written presentation (mark for CASS)

**Activity 59: Revision**

Student's Book page 151  
T4 SO4 LO1–5

**Guidelines**

As indicated, this is a revision exercise.

**Suggested answers**

Let the students use the information gathered during the previous sections of work, but leave scope for personal inputs and opinion.

**Inclusive education**

Special arrangements should be made for students with sight impairments as regards enlargement of text.

**Suggested assessment**

Method: Performance-based

Form: Homework/Class work

Tool: Written presentation (mark for CASS – see rubric on page xx)

**Activity 60: Revision**

Student's Book page 151  
T2 SO1 LO1

**Guidelines**

As indicated, this is a revision exercise.

**Suggested answers**

Any plausible answer, including:

- Records act as a reminder to the travel agent, car-hire company, hotel etc.
- Records provide a useful checklist
- Records can be referred to the case of a problem or dispute
- Records assist the agent in making future bookings because they provide customer history
- Records secure confidential information

**Inclusive education**

Make allowance for students who have physical trouble with writing or who are dyslexic.

**Suggested assessment**

Method: Performance-based

Form: Homework/Class work

Tool: Written presentation (mark for CASS – see rubric on page xx)

**Activity 61: What should have been done?**

Student's Book page 153  
T4 SO2 LO8

**Guidelines**

This activity has no fixed answers. Allow the students scope to come up with creative solutions.

**Activity 62: Simulated reservations**

Student's Book page 153  
T4 SO2 LO1–9

**Guidelines**

This exercise can be done in a real workplace environment. If simulated, try to achieve as realistic an atmosphere as possible. A few 'props' such as office desks, computers, client cards, information displays etc. would be necessary.

**Answers**

The process would need to follow the guidelines given in Activity 53.

**Inclusive education**

Any written information would need to be enlarged for students with sight impairments and sign language interpretation or lip reading may be necessary to assist students with hearing problems.

**Suggested assessment**

Method: Group (role-play)

Form: Class work

Tool: Oral presentation

**Activity 63: Services and information**

Student's Book page 154  
T4 SO4 LO1–5

**Guidelines**

This is a fairly brief activity to revise the previous information and place it in a practical context. If there are time constraints, the activity can take the form of a class discussion from the outset, but it would be preferable if students could first write down answers individually, followed by a class discussion.

### **Suggested answers**

1. Accept any plausible, practical answer which would credibly assist clients.

For example:

- Directions to hotel or place of interest: verbal directions, supplemented by a suitable map.
- Information on room service: if client is at the hotel, refer him or her to the documentation in the room. Otherwise, contact the hotel and request this information or refer the client to a brochure, if available.
- Telephone number: refer the client to the local telephone directory and preferably provide him or her with one or even offer to assist him or her to find the number if he or she is willing to let you do this.

### **Inclusive education**

Questions should be enlarged for students with sight impairments. Please ensure that students with hearing problems can hear or lip-read discussions (or that they have a sign language interpreter).

### **Suggested assessment**

Method: Self-assessment and answers by students

Form: Homework/class work

Tool: Students compare their answers with the rest of the class and mark the question according to the suggested answers.

## **Activity 64: Design a brochure**

Student's Book page 155  
T4 SO4 LO1

### **Guidelines**

This is known as a 'rainbow activity' which means that displays are presented simultaneously and visited by all groups who are given the chance to visit and evaluate the work of other groups. The teacher must make sure that groups and individuals rotate among the other presentations so that everyone has a chance to view all the displays. This can be done in various ways, for example, groups can move together in a clockwise direction, each visiting a different display for a few minutes. Then, at a given signal, the groups can move on to the next stall and so on. A more informal approach would be to simulate a tourism exhibition and allow students to walk around and view each display at will. The approach chosen would depend on the maturity of the students and the amount of space available.

It is a good idea to ensure that a group member remains at each display to answer the questions of his or her peers, but these students should also be given a chance to visit the other displays (a rotation system could be worked out here as well).

### **Suggested answers**

A four-point rubric can be used. Groups are evaluated by both teacher and other groups according to criteria of attractiveness, effectiveness, neatness of presentation and relatively up-to-date information (although bear in mind that it is unlikely that agents will be willing to part with their most recent information for this exercise, so be flexible).

### **Inclusive education**

Students with mobility problems will need assistance in preparing the display and in moving around the other presentations, as well as in visiting agents.

### **Suggested assessment**

Method: Task-based

Form: Rubric

Tool: Poster presentation

### **Activity 65: Handling unexpected situations**

and

### **Activity 66: Handling mistakes**

Student's Book page 156, 160  
T4 SO4 LO6, T4 SO4, LO4

### **Guidelines**

Note: The information and insight obtained in Activity 65 can be used to answer the questions in Activity 66.

This activity is designed to foster initiative as it is important in the tourism industry to 'think on one's feet' and be prepared for any eventuality. More situations could have been included in the notes, but it was thought that giving these and then suggesting solutions would encourage students to become note-bound and dependent on rote-learning.

### **Suggested answers**

These would depend on the situations mentioned by the students, but some which should be mentioned are:

- Tour fully booked – Solution: suggest an alternative tour with similar features
- Cannot meet customer needs: Explain reason to customer and suggest an alternative that approximates the customer's needs
- No booking found: Contact tour operator or responsible organisation, find out reason for problem, apologise to customer and do 'damage control', by rescheduling or finding an alternative. Some financial compensation or special offer would probably be in order. It is essential to satisfy the customer before dealing with the other parties involved. If they are to blame, they would have to offer suitable compensation.

• Special requests and rude aggressive customers have been dealt with within the notes. Students must at least deal with these situations. If not, then the teacher should introduce these as possible scenarios and ask students to suggest solutions.

Each student should then compile a comprehensive list of possible problems and solutions, based on the discussion, and file this in the PoE.

Role-play: Use rubric provided.

### **Inclusive education**

The same guidelines for sight and hearing impaired students apply as previously mentioned.

### **Suggested assessment**

Method: Performance-based

Form: Class work/ homework

Tool: Written and oral presentations (mark recorded for CASS)

# Chapter 5: Process payments

## About this chapter

The table below outlines the work covered in this chapter.

Chapter 5: Process payment	
<b>Unit 14: Operating a payment point</b>	<b>Receiving payment</b>
<ul style="list-style-type: none"><li>• Introduction</li><li>• Payment points</li></ul>	<ul style="list-style-type: none"><li>• Forms of payment</li><li>• Unauthorised payments</li></ul>

Learning outcomes to be covered? See chap 1

## Unit 14: Operating a payment point

### Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 67	T4 SO12 LO1

### Activity 67: Procedure at the end of a shift

Student's Book page 173  
T4 SO12 LO1

### Guidelines

Some props are necessary for this role-play, namely:

- 'Fake' money (Monopoly money or pieces of paper which the students could colour in or draw on to indicate different denominations)
- Plastic or tin discs to act as coins
- 'Fake' cheques and credit card slips
- Hand-over lists
- Other stationery e.g. pens
- Maybe a mock till to make the role-play more realistic.

It is a good idea to repeat this exercise at least a couple of times, using different amounts. This will give the students necessary practice and prepare them for the real situation in the working

environment.

### Suggested answers

The amount must balance at the end (see instructions to students):

Cash brought forward (float) plus total sales should equal the cash on hand, including cheques and credit card slips.

### Inclusive education

'Money' should be drawn, coloured, enlarged or otherwise designed in such a way as to be clear to students with sight impairments. Maybe raised letters could be taped on to the coins (and even onto the notes) to assist these students.

Students with hearing difficulties can be accommodated by facilitating lip-reading or using sign language or an interpreter as previously suggested.

### Suggested assessment

Method: Task-based

Form: Class work (pair work)

Tool: Oral presentation

# Unit 15: Receiving payment

## Unit outcomes

Activity	Topic, Subject Outcome and Learning Outcome
Activity 68	T5 SO14 LO1

### Activity 68: Role-play

Student's Book page 181  
T5 SO14 LO1

### Guidelines

This role-play should test whether the principles of courteous customer service and dealing with difficult situations have been internalised by the students and can therefore be put into practice.

To make the exercise more realistic and more 'fun', students can be seated at a table and some of the group can act the parts of other family members. Allow the actors to use their imagination and to improvise, if they wish.

Some preliminary research regarding credit card regulations is necessary – students could be asked to find out about these from the local banks.

### Suggested answers

These will emerge in the course of the role-play, but obviously the ideal solution would be if the waitron and maybe the manager spoke to Mrs Welland in private and made it clear that there is no suspicion of any wrongdoing on her part. Tactful handling of this situation is of paramount

importance. The card division of bank can be contacted if possible and the situation explained. Mrs Welland may have to provide proof of identity for payment to go through, but this would depend on the rules current at the time (which is why preliminary research is necessary for this activity) – or she could be encouraged to pay by some other means (e.g. cash) if possible. Maybe she could quietly approach one of her children and put it on his or her credit card for the time being. The waitron or manager should apologise for any inconvenience caused, but point out that these security arrangements are beneficial in the long run as they prevent credit card fraud.

#### **Inclusive education**

Arrangements should be made for students with hearing difficulties in order for them to follow the role-play and subsequent discussion.

To assist both this group and the students with sight impairments, the possible solution could be summarised and written clearly on the board at the end of the lesson.

If banks are to be visited, transport arrangements would have to be made for students with mobility difficulties. Preferably, encourage these students to visit banks which have suitable facilities as mentioned previously.

#### **Suggested assessment**

Method: Group

Form: Case study

Tool: Oral presentation