



NATIONAL CERTIFICATES (VOCATIONAL)

SUBJECT GUIDELINES

TOURISM OPERATIONS NQF LEVEL 2

September 2007

INTRODUCTION

A. What is Tourism Operations?

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

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

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

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

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

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

In Tourism Operations, students should be able to:

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

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

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

TOURISM OPERATIONS – LEVEL 2

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1 DURATION AND TUITION TIME

This is a one-year instructional programme comprising 200 teaching and learning hours. The subject may be offered on a part-time basis provided the student meets all the assessment requirements.

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

2 SUBJECT LEVEL FOCUS

The student should be able to:

- Handle and maintain tourism office equipment.
- Operate and maintain a tourism information system.
- Manage telephone calls professionally.
- Receive and process reservations.
- Create and maintain a recordkeeping system.
- Book external services for guests.
- Process payments and operate a payment point.

3 ASSESSMENT REQUIREMENTS

3.1 Internal assessment (50 percent)

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

3.1.1 Theoretical component

The theoretical component forms 60 percent of the internal assessment mark.

Internal assessment of the theoretical component in Tourism Operations Level 2 takes the form of observation, class questions, group work, informal group competitions with rewards, individual discussions with students, class, topic and semester tests and internal examinations. Lecturers can observe students when marking exercises from the previous day and asking class questions.

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

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

3.1.2 Practical component

The practical component forms 40 percent of the internal assessment mark.

Practical components include applications and exercises. All practical components must be indicated in a Portfolio of Evidence (PoE).

Internal assessment of the practical component in Tourism Operations Level 2 takes the form of assignments, practical exercises, case studies and practical examinations in a simulated business environment.

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

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

- A. Presentations (lectures, demonstrations, group discussions and activities, practical work, observation, role-play, independent activity, synthesis and evaluation)
- B. Exhibitions by students
- C. Visits undertaken by students based on a structured assignment task
- D. Research
- E. Task performance in a "Structured Environment"

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

For the purposes of assessment, “Structured Environment” refers to a simulated workplace or workshop environment. A practicum room should be available on each campus (where applicable) for practical assessments.

- **Evidence in practical/application assessments**

All evidence pertaining to evaluation of practical work must be reflected in the students’ Portfolio of Evidence (PoE). The tools and instruments constructed and used to conduct these assessments must be clear from the evidence contained in the Portfolio of Evidence (PoE).

- **Job shadow or industry practicum**

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

- Cover page – details of student and workplace
- Key functions to be observed (job shadowing) or competencies to be demonstrated (industry practicum)
- Period of job shadowing or practicum, with relevant dates
- Daily signature of supervisor and student
- Evaluation or comment by supervisor, including recommendations for improvement

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

3.1.3 Processing of Internal assessment mark for the year

A year mark out of 100 is calculated by adding the marks of the theoretical component (60 percent) and the practical component (40 percent) of the internal continuous assessment (ICASS).

3.1.4 Moderation of internal assessment mark

Internal assessment is subjected to internal and external moderation procedures as set out in the *National Examinations Policy for FET College Programmes*.

3.2 External assessment (50 percent)

A National Examination is conducted annually in October or November by means of a paper(s) set and moderated externally. A practical component will also be assessed.

External assessment details and procedures are set out in the *Assessment Guidelines: Tourism Operations (Level 2)*.

4 WEIGHTED VALUES OF TOPICS

TOPICS	WEIGHTED VALUE
1. Operate and Maintain Office Equipment	10
2. Manage and Store Information	30
3. Use the Telephone	10
4. Apply Product Knowledge and Make Reservations	30
5. Process Payments	20
TOTAL	100

5 CALCULATION OF FINAL MARK

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

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

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

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

6 PASS REQUIREMENTS

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

7 SUBJECT AND LEARNING OUTCOMES

On the completion of Tourism Operations Level 2, the student should have covered the following topics:

- Topic 1: Operate and Maintain Office Equipment
- Topic 2: Manage and Store Information
- Topic 3: Use the Telephone
- Topic 4: Apply Product Knowledge and Make Reservations
- Topic 5: Process Payments

7.1 Topic 1: Operate and Maintain Office Equipment

Subject Outcome 1: Follow instructions to operate office equipment.

Learning Outcomes:

The student should be able to:

- Identify the functions of equipment in own area of responsibility.
- Understand instructions for operating equipment and follow them responsibly with due regard for safety.
- Identify common problems or faults that occur on a routine basis and solve them, following the manufacturer's instructions.
- Recognise persistent and non-routine problems or faults that require specialist technical skills and report them to the relevant authority.

Subject Outcome 2: Maintain equipment in clean and working condition.

Learning Outcomes:

The student should be able to:

- Clean the equipment and keep in good repair according to the manufacturer's instructions.
- Replace consumable items according to the procedures for the particular machine.
- Describe the dangers of working with electricity and apply safety precautions when cleaning equipment.
- Explain the risks or hazards associated with the use of equipment and the disposal of waste from the machines.
- Dispose of discarded items safely and appropriately.
- Describe the relevant legal requirements that apply to regulations and warranties for selected equipment.

Subject Outcome 3: Monitor and request consumables.

Learning Outcomes:

The student should be able to:

- Estimate the quantity of consumables needed for a specified period.
- Request the required consumables in time according to established procedures.
- Handle consumables correctly and store them securely according to the business' requirements.
- Update the required records for consumables accurately.

Subject Outcome 4: Recognise and take steps to minimise risks when operating equipment.

Learning Outcomes:

The student should be able to:

- Organise the area around the equipment to minimise risk to self and others.
- Correct existing or potential safety risks involving equipment in own working area.
- Identify safety risks involving equipment outside own work area and report them to the appropriate authority.
- Identify actions to be taken to deal with emergencies involving equipment for a specific tourism organisation.

- Report emergencies involving equipment in an agreed format and according to organisational procedures.

7.2 Topic 2: Manage and Store Information

Subject Outcome 1: Explain why companies record and keep information.

Learning Outcomes:

The student should be able to:

- Explain the reason for recording information with reference to an actual document used in a tourism business.
- List five examples of the types of information contained in records in a tourism business.
- Name three methods of creating records that use different types of technology.
- Describe the purpose for which a record is used for three different roles in a tourism organisation.

Subject Outcome 2: Name and describe the types of record that are specific to a contract in the tourism sector

Learning Outcomes:

The student should be able to:

- Identify a policy, agreement, contract and quotation specific to the tourism sector as different types of records.
- Explain the type of information contained in a contract, agreement or quotation.
- Describe the purpose of maintaining a record of contracts, agreements and quotations with reference to specific tourism case studies.
- Explain the importance of client-specific details with examples from the tourism sector.
- Explain the purpose of recording changes to contracts, agreements and quotations with reference to three different circumstances (all tourism related).

Subject Outcome 3: Locate and provide records to users on request.

Learning Outcomes:

The student should be able to:

- Use suitable paper or electronic filing systems to locate the required record.
- Locate, access and retrieve requested data according to agreed organisational service levels.
- List and explain the reasons why confidential records are given only to authorised people.
- Explain the implications of releasing information to unauthorised persons in terms of risk to the company.
- Make and provide a copy of the record as requested, note the request and compliance and return the original documents to the correct location.
- Maintain the confidentiality of records at all times and explain security procedures in simple terms.

Subject Outcome 4: Maintain confidentiality of customer and company information.

Learning Outcomes:

The student should be able to:

- Recognise violations of company procedures relating to the confidentiality of information and report them following established procedures.
- Recognise information classified as confidential and disclose only to approved personnel.
- Describe and explain company and legal requirements and conform all outputs and inputs to the storage system following established procedures.
- Identify situations where colleagues do not comply with security and confidentiality procedures and report immediately to the appropriate authority.
- Carry out all work activities according to the code of conduct and within the requirements of the organisation's security procedures.

Subject Outcome 5: Store information using an existing storage system.

Learning Outcomes:

The student should be able to:

- Classify, sort and record paper-based documentation according to established requirements.

- Store information in the correct location and sequence and describe the serious effect that misfiled documentation has on an organisation.
- Store documents in a manner that ensures that they are undamaged, safe and accessible when required.
- Classify and cross-refer information accurately. Refer classification uncertainties to an appropriate authority.
- 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.
- Discuss the organisation's procedures for archiving in terms of being current, accurate and according to a prescribed format.
- Describe the implications for productivity when an item cannot be located.
- Source and gather filing documentation.
- Create an electronic file and label according to requirements.
- File electronic documentation according to organisational requirements.
- Complete filing within organisational timeframes and standards.
- Refer classification uncertainties to an appropriate authority.
- Classify, sort and store materials without damage, in a safe and secure manner.

Subject Outcome 6: Retrieve information from an existing storage system.

Learning Outcomes:

The student should be able to:

- Locate required information promptly and obtain, copy and dispatch it to the correct person or location.
- Communicate delays in the supply of information and politely explain the reason for delay.
- Correctly record retrieved information to track all files.
- Identify missing or overdue items and follow correct procedures to locate them.

Subject Outcome 7: Store valuable documentation and reference materials securely.

Learning Outcomes:

The student should be able to:

- Describe the process for securing valuable items and maintaining that security.
- Explain reasons for security procedures with examples of the effects on an organisation if there is a breach of security.
- Identify and correct security risks in own area of authority.
- Recognise violations of security and report them following familiar and established procedures.

7.3 Topic 3: Use the Telephone

Subject Outcome 1: Process incoming and outgoing phone calls.

Learning Outcomes:

The student should be able to:

- Describe confidential information and explain why it cannot be disclosed.
- Explain the importance of acknowledging callers and keeping them informed of reasons for delays.
- List various ways of finding telephone numbers.
- Explain the difference in answering one's own private telephone and the way the switchboard is answered in terms of assisting customers.
- Describe standard telephone etiquette on answering, transferring and making calls.
- Describe the use of body language in communicating with others while on the telephone and the reason why it is important.
- Describe methods for dealing with abusive callers.
- Describe methods for dealing with emergencies.
- Demonstrate how all necessary documentation and equipment (computers, writing material, notes, etc.) are prepared prior to making outgoing calls.
- 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.
- Ask probing questions to find out the purpose of the call, then transfer the caller to another person who may be more able to assist.
- Take messages for others in the organisation, following the correct procedure.

- Given the nature of the call, decide whether to take a detailed message or to offer to have someone call the customer back.
- Deal politely with callers (incoming, transfers and outgoing), in keeping with the organisation's image and standard telephone etiquette.
- Deal with calls quickly and politely, keeping other callers holding as little as possible.
- Given a specific situation, decide what information can and cannot be disclosed and explain why.
- Given that a new switchboard is being introduced into the organisation, suggest ways to learn the new system quickly and become competent.

7.4 Topic 4: Apply Product Knowledge and Make Reservations

Subject Outcome 1: Demonstrate knowledge and understanding about services and facilities regarding reservations.

Learning Outcomes:

The student should be able to:

- Explain the importance of a good knowledge of services and facilities and how incorrect information could impact on cost and customer service.
- Describe the interrelationship between different sectors of the tourism and hospitality industries and how they relate to reservations.
- Explain the reasons for quickly and accurately dealing with customers when making reservations.
- Explain a central reservations system and how this system affects the performance of the reservations department.
- Describe ways of dealing with power failure and booking errors.

Subject Outcome 2: Demonstrate the ability to make reservations.

Learning Outcomes:

The student should be able to:

- Use a manual and/or computerised reservation system according to organisational procedures.
- Given a range of reservations and a range of customers, check availability of service, advise guests and suggest alternatives.

Range of reservations: Phone, fax, e-mail, face-to-face and Internet

Range of customers: Individual, group, booking agencies, customers with communication difficulties, customers with mobility difficulties, regular customers, VIPs and conference delegates

- Explain why it is important to accurately answer inquiries regarding cost and other product features.
- Check customer history and use this information to assist in making the reservation.
- Make the reservation following the correct procedure and record customer and payment details accurately.
- Record special requests clearly and accurately and explain the importance (for the organisation) of doing this.
- File completed reservations correctly.
- Explain the reasons for accurately recording cancellations and amendments to reservations.
- Explain the importance of advising departments and colleagues of specific customer requirements.

Subject Outcome 3: Demonstrate the ability to learn from own actions and adapt performance when faced with problematic or unusual reservation circumstances.

Learning Outcomes:

The student should be able to:

- Given a situation where the computer system has failed or no reservations have been received from the central reservations system, describe ways to solve the situation.
- In a different type of establishment (e.g. B&B or game lodge) where a manual system is used, describe how reservations are dealt with.

Subject Outcome 4: Demonstrate knowledge and understanding about providing information to and booking additional services for guests.

Learning Outcomes:

The student should be able to:

- Explain the importance of giving accurate information to guests who would like to book extra services.
- Explain how inaccurate information impacts on the company, the customer and the service provider.
- Explain the importance of good general knowledge in terms of helping a guest.
- Describe different sources of information and their uses.
- Describe different ways of contacting service providers.

Subject Outcome 5: Attend to customers in a professional manner.

Learning Outcomes:

The student should be able to:

- Explain the importance of attending to customers with minimum delay and in a polite, friendly manner.
- Identify customers' needs correctly, given a range of inquiries.

Range of information: Directions, travel information, local information, guest services and telephone numbers

- Use appropriate information sources to provide customers with accurate information.

Range of sources: Maps, timetables, directories, guides and organisations contacted by telephone

- Make bookings for external services following correct procedure and stress the importance of doing so promptly.

Range of external services: Transport, restaurant reservations and items to be delivered from external organisations

- Display customer information prominently and maintain constant supply of information that is current.
- Make decisions on how to deal with unexpected situations and give reasons for that choice of action.

Range of situations: Special customer requests, rude or aggressive customers, tour fully booked, no booking found and unable to meet customer needs

Subject Outcome 6: Given a different type of establishment, describe ways of providing customer information and booking services.

Learning Outcome:

The student should be able to:

- Provide external services and customer information at a different type of establishment.

Range of establishments: Game lodge, B&B and five-star establishments

7.5 Topic 5: Process Payments

This topic must be assessed in a working environment or in a realistic working environment using a combination of observation, simulation and questioning. Observation can cover payment points, dealings with customers, preparation and use of equipment and cashing up procedures at the end of a shift or at handover. Simulation can be supplemented by questioning to cover unexpected situations

Range of payment points: Tills or billing machines with cash drawers, speed points or manual card machines

Range: Shortage of change, supplies, till rolls and cash discrepancies

Subject Outcome 1: Explain the importance of having sufficient change available at all times.

Learning Outcome:

The student should be able to:

- Discuss the importance of having sufficient change available at all times and the impact on the customer of not doing this.

Subject Outcome 2: Explain the importance of having only a limited amount of cash at a payment point.

Learning Outcome:

The student should be able to:

- Discuss the importance of having only a limited amount of cash at a payment point at any given time.

Subject Outcome 3: Explain the reason for securing a payment point from unauthorised access.

Learning Outcome:

The student should be able to:

- Discuss the reason for securing a payment point from unauthorised access and the impact on the organisation of not doing this.

Subject Outcome 4: Describe types of unauthorised payments.

Learning Outcome:

The student should be able to:

- Describe types of unauthorised payments and explain the reasons for handling unauthorised payments discreetly.

Subject Outcome 5: Describe organisational procedures for operating a payment point

Learning Outcome:

The student should be able to:

- Research and discuss organisational procedures for operating a payment point.

Subject Outcome 6: Interact with all customers in a polite and friendly manner at all times.

Learning Outcome:

The student should be able to:

- Display politeness and friendliness towards the customer whilst completing the transaction.

Subject Outcome 7: Prepare till(s) and billing machines correctly for operation.

Learning Outcome:

The student should be able to:

- Prepare till(s) and billing machines correctly for operation and where appropriate, complete handover procedures correctly.

Subject Outcome 8: Operate payment point equipment in accordance with organisational procedures.

Learning Outcome:

The student should be able to:

- Operate payment point equipment in accordance with organisational procedures.

Subject Outcome 9: Keep sufficient stock of audit rolls, receipt rolls or customer bills.

Learning Outcome:

The student should be able to:

- Explain the importance of keeping sufficient stock of audit rolls, receipt rolls or customer bills and replacing these when necessary.

Subject Outcome 10: Deal with customers promptly and explain the importance of prompt service.

Learning Outcome:

The student should be able to:

- Deal with customers promptly whilst processing the payment and explain the importance of prompt service.

Subject Outcome 11: Alert the supervisor or manager when a shortage of change arises.

Learning Outcome:

The student should be able to:

- Alert the supervisor or manager when a shortage of change arises.

Subject Outcome 12: Given the end of the shift, close the payment point down or complete the handover correctly.

Learning Outcome:

The student should be able to:

- Close the payment point down at the end of a shift or complete the handover correctly.

Subject Outcome 13: Make suggestions on how to secure the payment point from unauthorised access at all times.

Learning Outcome:

The student should be able to:

- List suggestions on how to secure the payment point from unauthorised access at all times.

Subject Outcome 14: Given a range of unexpected situations, decide whether to deal directly with the situation or request assistance.

Learning Outcome:

The student should be able to:

- Given a range of unexpected situations, decide whether to deal with the situation directly or request assistance from the supervisor or manager.

Range of unexpected situations: Discrepancies with cash, shortage of supplies or change, customer disputes, float shortages, problems with customer payments, equipment malfunctions, counterfeit money or suspected card or cheque fraud and errors or voids

Subject Outcome 15: Acknowledge receipt of payment.

Learning Outcome:

The student should be able to:

- Acknowledge receipt of payment.

Range of payment: Cash, credit or debit cards, cheques, tokens and voucher

8 RESOURCE NEEDS FOR THE TEACHING OF TOURISM OPERATIONS LEVEL 2

(Recommended per group of 15 – 20 students)

8.1 Physical resources

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

8.1.1 Practicum room or simulator

- A practical room (e.g. a front office or a tourism information centre) which simulates a tourism office environment with the basic office furniture and equipment and the necessary electronic equipment, e.g. computer(s), printer, telephones, fax machines and photocopier
- Two-hole punch and stapler, ideally per work station
- Filing cabinet
- Brochure stand(s)
- Counter top, work station or reception counter as applicable
- Display boards
- Internet access and software training programmes, e.g. for making reservations
- At least one computer (with colour printer and connected to the Internet) equipped with a DVD-writer for presentations
- Storeroom facility for Portfolios of Evidence (PoEs), ideally directly connected to the simulator venue for easy access

8.1.2 Classroom

- Classroom or lecture venues for use by Tourism students, where a tourism “feel” can be created with maps, posters, wall decorations, industry magazines, etc.
- TV monitor and DVD or VCR player
- DSTV satellite dish and decoder with connection (for Travel Channel, National Geographic, etc.)
- Computer and data projector and screen
- Flash disk for lecturer to store information
- Presentation programme on computer to be used by lecturer to provide students with visual information on Learning Outcomes
- Digital video camera (with necessary connections and memory cards)
- Wall clocks (minimum five) to explain time zones or world times
- Larger-than-usual desks or tables as Tourism students work with documents, maps, atlases, globe, reference books, etc.
- Reference books (e.g. Lonely Planet, Rough Guide and World Travel Guide)

- Dictionaries
- Wall maps (World; Africa physical and political; South Africa physical and political)
- Overhead projector and pull down screen
- Flipchart
- White board and/or black board
- Storeroom facility for maps and other teaching aids, consumables, etc.
The storeroom should ideally be situated adjacent to or near the Tourism classroom(s) for easy access.
- Notice board(s) outside in the corridor(s)

8.1.3 Media or resource centre

- Computers and printers for students to complete assignments or case studies and do additional research
- Research software e.g. Encarta
- Subject-related magazines (e.g. Getaway, Travel News Weekly and Outdoors), daily newspapers and subject-related reference books for research by lecturers and students
- Subject-related DVDs and videos
- Copies of applicable tourism legislation or acts

8.2 Human resources

8.2.1 Lecturers

- Lecturers must have a tertiary qualification (or qualification on NQF Level 7) in Travel and/or Tourism or Hospitality, preferably with relevant industry experience.
- In cases where Tourism industry experience is non-existent, it is strongly recommended that the lecturer do some part-time work in the Tourism industry, e.g. during college holiday periods, to gain practical work experience.
- It will be an advantage if lecturers have already been declared competent as assessors and/or moderators.
- Lecturers must have had training in outcomes-based education.
- Partnerships should be established with the industry to augment facilitation in certain specialised areas where the appointed lecturer lacks the necessary expertise.
- The lecturer must be trained to manage the simulator or practicum room activities.

8.3 Other resources

- Iveco bus – 20 seater for educational excursions and projects

8.4 Consumables

- Learning material and textbooks
- Answer books, with examples, that students must complete for practical assignments
- Basic calculator for each student
- Lever arch file for each student to serve as Portfolio of Evidence (PoE)
- Subscription fees for Internet, subject-related magazines, newspapers, TV license, etc.
- Disks and CDs
- Ink cartridges (black and colour)
- Transparencies and pens
- Glossy paper
- Standard office stationary (pens, tippex, etc.)
- Plastic sleeves or files
- Dividers
- Relevant reservations registers and related tourism documents
- Logbooks