NATIONAL CERTIFICATES (VOCATIONAL)

ASSESSMENT GUIDELINES

TOURISM OPERATIONS
NQF Level 3

September 2007
TOURISM OPERATIONS – LEVEL 3

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SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

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

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

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

1 ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

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

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

The principles that drive these objectives are:

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

- **Relevance**
  To be dynamic and responsive to national development needs.

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

- **Coherence**
  To work within a consistent framework of principles and certification.

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

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

- **Access**
  To address barriers to learning at each level to facilitate students’ progress.
• **Progression**  
To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

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

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

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

• **Validity of assessments**  
To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:
  - clearly stating the outcome to be assessed;
  - selecting the appropriate or suitable evidence;
  - matching the evidence with a compatible or appropriate method of assessment; and
  - selecting and constructing an instrument(s) of assessment.

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

• **Fairness and transparency**  
To verify that no assessment process or method(s) hinders or unfairly advantages any student. The following could constitute unfairness in assessment:
  - Inequality of opportunities, resources or teaching and learning approaches
  - Bias based on ethnicity, race, gender, age, disability or social class
  - Lack of clarity regarding Learning Outcome being assessed
  - Comparison of students’ work with other students, based on learning styles and language

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

2 ASSESSMENT FRAMEWORK FOR VOCATIONAL QUALIFICATIONS
The assessment structure for the National Certificates (Vocational) qualification is as follows:

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

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

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

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

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

3 MODERATION OF ASSESSMENT

3.1 Internal moderation

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

3.2 External moderation

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

The external moderator:

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

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

4 PERIOD OF VALIDITY OF INTERNAL CONTINUOUS ASSESSMENT (ICASS)

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

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

5 ASSESSOR REQUIREMENTS

Assessors must be subject specialists and should ideally be declared competent against the standards set by the ETDP SETA. If the lecturer conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process in order to ensure the quality and integrity of assessments.
6 TYPES OF ASSESSMENT
Assessment benefits the student and the lecturer. It informs students about their progress and helps lecturers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.

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

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

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

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

7 PLANNING ASSESSMENT
An assessment plan should cover three main processes:

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

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

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

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

<table>
<thead>
<tr>
<th>LECTURER ASSESSMENT</th>
<th>The lecturer assesses students’ performance against given criteria in different contexts, such as individual work, group work, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELF-ASSESSMENT</td>
<td>Students assess their own performance against given criteria in different contexts, such as individual work, group work, etc.</td>
</tr>
<tr>
<td>PEER ASSESSMENT</td>
<td>Students assess another student’s or group of students’ performance against given criteria in different contexts, such as individual work, group work, etc.</td>
</tr>
<tr>
<td>GROUP ASSESSMENT</td>
<td>Students assess the individual performance of other students within a group or the overall performance of a group of students against given criteria.</td>
</tr>
</tbody>
</table>
9 INSTRUMENTS AND TOOLS FOR COLLECTING EVIDENCE

All evidence collected for assessment purposes is kept or recorded in the student’s Portfolio of Evidence (PoE).

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

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

10 TOOLS FOR ASSESSING STUDENT PERFORMANCE

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

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

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

11 SELECTING AND/OR DESIGNING RECORDING AND REPORTING SYSTEMS

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

Computer-based systems, for example spreadsheets, are cost and time effective. The recording system should be user-friendly and information should be easily accessed and retrieved.
12 COMPETENCE DESCRIPTIONS
All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not be simply a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) that a student must demonstrate to achieve each level of the rating scale.

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

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

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

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

SECTION C: ASSESSMENT IN TOURISM OPERATIONS

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

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

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

<table>
<thead>
<tr>
<th>Rating Code</th>
<th>Rating</th>
<th>Marks %</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Outstanding</td>
<td>80-100</td>
</tr>
<tr>
<td>4</td>
<td>Highly competent</td>
<td>70-79</td>
</tr>
<tr>
<td>3</td>
<td>Competent</td>
<td>50-69</td>
</tr>
<tr>
<td>2</td>
<td>Not yet competent</td>
<td>40-49</td>
</tr>
<tr>
<td>1</td>
<td>Not achieved</td>
<td>0-39</td>
</tr>
</tbody>
</table>
The programme of assessment should be recorded in the Lecturer’s Portfolio of Assessment for each subject. The following at least should be included in the Lecturer’s Assessment Portfolio:

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

The college must standardise these documents.

The student’s Portfolio of Evidence (PoE) must include at least:

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

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

The following units guide internal assessment in Tourism Operations:

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

#### Topic 1: Tourism marketing

#### SUBJECT OUTCOME

1.1 Identify and define what marketing is

**ASSESSMENT STANDARD**
- A definition of marketing is given in the context of the Tourism industry
- All the elements of marketing, as related to the Tourism industry, are identified and listed
- Marketing is put into context with other functions in the Tourism office

**LEARNING OUTCOME**
- Verbally explain marketing in the context of the Tourism industry
- Identify and list all the elements of marketing, relating them to the Tourism industry
- Put marketing into context with other functions in the Tourism office

**ASSESSMENT TASKS OR ACTIVITIES**
- Compile a diagram or flow chart with marketing definition in the centre, indicating the elements of marketing (with tourism examples)
- Compile a diagram or flowchart relating marketing to other functions in a typical tourism business

1.2 Identify marketing principles and concepts

**ASSESSMENT STANDARD**
- Marketing principles are defined
- The components of a marketing concept in Tourism are defined
- A commitment to marketing principles in a Tourism context is demonstrated

**LEARNING OUTCOME**
- Verbally define marketing principles
- Define the components of a marketing concept in Tourism
- Demonstrate a commitment to marketing principles in a Tourism context

**ASSESSMENT TASKS OR ACTIVITIES**
- Class discussion to formulate definition
- Compile a written list
- Search for a relevant article in the press and participate in small group discussions
- File article and short written paragraph or comments in PoE
- Case study with question and answers at end of the section

1.3 Identify the benefits of instilling a marketing culture in oneself

**ASSESSMENT STANDARD**
- Tourism examples for each of the following benefits are given:
  - People are influenced towards a marketing culture
  - Company competitiveness is ensured
  - Job satisfaction levels are ensured
  - Overall business process runs more smoothly
  - Customer needs are met

**LEARNING OUTCOME**
- Formulate tourism examples for each of the following benefits:
  - People are influenced towards a marketing culture
  - Company competitiveness is ensured
  - Job satisfaction levels are ensured
  - Overall business process runs more smoothly
  - Customer needs are met

**ASSESSMENT TASKS OR ACTIVITIES**
- Group discussions during which student compiles own examples
- Articles from the press can be sourced in advance, in order to stimulate the discussions
### SUBJECT OUTCOME

#### 1.4 Persuade others of the benefits of a marketing culture

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer orientation is identified and explained against a Tourism background</td>
<td>Identify and explain computer orientation against a Tourism background</td>
</tr>
<tr>
<td>Customer service orientation is identified and explained in a Tourism context</td>
<td>Identify and explain customer service orientation in a Tourism context</td>
</tr>
<tr>
<td>Interdepartmental objectives are met</td>
<td>Meet interdepartmental objectives (using a Tourism organisation example)</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES
- Worksheets with comprehension-type scenarios relating to the Learning Outcomes with the questions planned in such a way that they will assist student to formulate own ideas as set out in the three Learning Outcomes

### SUBJECT OUTCOME

#### 1.5 Explain integrated marketing communications in the context of the Tourism industry

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>A complete but concise definition of integrated marketing communications in Tourism is formulated</td>
<td>Formulate a complete but concise definition of integrated marketing communications in Tourism</td>
</tr>
<tr>
<td>The evolution of integrated marketing communications is briefly explained</td>
<td>Briefly explain the evolution of integrated marketing communications</td>
</tr>
<tr>
<td>The use of integrated marketing communications in Tourism is described</td>
<td>Describe the use of integrated marketing communications in Tourism</td>
</tr>
<tr>
<td>Steps in using integrated marketing communications in the Tourism Industry are listed and explained</td>
<td>List and explain steps in using integrated marketing communications in the Tourism Industry</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES
- Write the definition of marketing communication, (including sponsorship, event marketing, sales promotion and advertising through public relations)
- Research and report back, describing the shift from ‘sales talk’ and pure advertising only, to the more integrated approach of modern marketing communication. In the discussion mention should also be made of the shift from the production era to the sales era to the marketing era. Examples should be Tourism related as far as possible
- Group discussion on the role of marketing communications including promoting image, providing information, creating, increasing and stabilising demand, differentiating product features and benefits, providing competitive differentiation, customer retention and loyalty, motivating staff; Briefly consider how these can be applied?
- Student to compile own written descriptions for PoE
- Compile a list of the detailed process of the marketing communication plan, from determining the promotional opportunity and promotional objectives, to selecting the appropriate audience, the message, the marketing communication mix etc. to determining the budget, implementing the plan and measuring the results. Student must apply the steps to a simple Tourism promotional idea as the list grows and develops

### SUBJECT OUTCOME

#### 1.6 Explain the objectives of integrated marketing communications in the Tourism industry

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>The objectives of integrated marketing communications in the Tourism industry are defined</td>
<td>Define the objectives of integrated marketing communications in the Tourism industry</td>
</tr>
<tr>
<td>The objectives’ roles in the process of marketing communication are explained</td>
<td>Explain the objectives’ roles in the process of marketing communication</td>
</tr>
<tr>
<td>Methods of communicating marketing communications objectives are explained</td>
<td>Explain methods of communicating marketing communications objectives</td>
</tr>
<tr>
<td>The use and control of objectives (against a Tourism background) are explained</td>
<td>Explain the use and control of objectives (against a Tourism background)</td>
</tr>
</tbody>
</table>
ASSESSMENT TASKS OR ACTIVITIES

• Compile a definition of advertising objectives in Tourism i.e. why is one doing it?
• Advertising objectives should meet certain requirements - student should research Tourism marketing source literature and try to formulate four or five of these requirements, i.e. what results will I achieve by advertising, or promoting etc.
• By means of an applicable case study, introduce student s to the ATR model (Awareness, Trial and Reinforcement) and lead them with questions-and-answer worksheet to apply this variation of the communication process to a tourism-related business situation
• Supply student with an example e.g. in winter, a promotion would be a more suitable tool for a specific travel destination than plain advertising. Student must then identify three other tourism situations where the use and control of objectives can be illustrated

SUBJECT OUTCOME

1.7 Describe integrated marketing communication tools that can be used in the Tourism industry

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated marketing communication tools in Tourism are defined</td>
<td>Define integrated marketing communication tools in Tourism</td>
</tr>
<tr>
<td>A list of integrated marketing communication tools is compiled</td>
<td>Draw up a list of integrated marketing communication tools</td>
</tr>
<tr>
<td>How and where these tools can be used in the Tourism industry, is described</td>
<td>Describe how and where these tools can be used in the Tourism industry</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Group discussion, then write a definition
• Assignment or project: Compile a diagram with a detailed list, including the whole marketing mix, advertising, the AIDA principle, (Attention, Interest, Desire, Action principle) brochures and print material, advertising media, personal selling, sales promotions, direct marketing, on-line marketing (Internet*), exhibitions and public relations. Other columns in the diagram can match the possible ‘how and where’ of each tool.
• * IT-related exercise towards website design recommended here

Topic 2: Tourism entrepreneurship

SUBJECT OUTCOMES

2.1 Describe and discuss entrepreneurship in tourism

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Entrepreneur” and “intrapreneur” are described and discussed in terms of tourism employment opportunities</td>
<td>Describe and discuss “entrepreneur” and “intrapreneur” in terms of tourism employment opportunities</td>
</tr>
<tr>
<td>Different types of entrepreneurial opportunities are identified, described and discussed within the tourism industry</td>
<td>Identify, describe and discuss different types of entrepreneurial opportunities within the tourism industry</td>
</tr>
<tr>
<td>Advantages and disadvantages of entrepreneurship are discussed and tourism-related examples are given</td>
<td>Discuss advantages and disadvantages of entrepreneurship and give tourism-related examples</td>
</tr>
<tr>
<td>The role of tourism entrepreneurship in social development is explained and tourism examples are given</td>
<td>Explain the role of tourism entrepreneurship in social development and give tourism examples</td>
</tr>
<tr>
<td>Range: Job creation, local wealth creation, negation of the migrant labour, urbanization, empowerment</td>
<td>Range: Job creation, local wealth creation, negation of the migrant labour, urbanization, empowerment</td>
</tr>
<tr>
<td>Reasons for business failure are identified and discussed against the tourism industry background</td>
<td>Identify and discuss reasons for business failure against the tourism industry background</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Written tasks based on related research on well-known local tourism entrepreneurs and aided by group discussions
• Draw a diagram (3 column) and complete
• NB: Several case studies and related question-and-answer worksheets on each of these points but especially on BEE and the importance of bringing BEE into the tourism business
• Set a case study of a tourism enterprise that has failed, then lead with a class discussion, so that student can compile own list of reasons for failure and/or pitfalls to beware of
### SUBJECT OUTCOMES

#### 2.2 Identify and describe the characteristics of a successful tourism entrepreneur

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>- The characteristics of a successful entrepreneur are identified and discussed, with tourism examples</td>
<td>- Identify the characteristics of a successful entrepreneur and discuss, with tourism examples</td>
</tr>
<tr>
<td>- Skills, aptitudes, personality and values of entrepreneurial behaviour are differentiated, with relevant tourism examples</td>
<td>- Differentiate skills, aptitudes, personality and values of entrepreneurial behaviour with relevant tourism examples</td>
</tr>
<tr>
<td>- The importance of each characteristic is analysed in the context of a specific new tourism venture</td>
<td>- Analyse the importance of each characteristic in the context of a specific new tourism venture</td>
</tr>
<tr>
<td>- The technical, business, managerial and personal strategies required for establishing a successful tourism venture are explained and examples are provided</td>
<td>- Explain the technical, business, managerial and personal strategies required for establishing a successful tourism venture and provide examples</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES

- Compile a table or adapt from an earlier, similar exercise. Alternatively, use an article about a prominent tourism entrepreneur from a current financial magazine, as comprehension test/worksheet
- Set short written tasks to guide student towards research on each of these strategies, ending in a group discussion or oral report-back session

### SUBJECT OUTCOMES

#### 2.3 Identify, assess and improve tourism entrepreneurial characteristics

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>- A base-line knowledge in respect of own personality, interests and aptitude is established</td>
<td>- Establish a base-line knowledge in respect of own personality, interests and aptitude</td>
</tr>
<tr>
<td>- Individual/ personal entrepreneurial characteristics are assessed against the general entrepreneurial characteristics</td>
<td>- Assess individual/ personal entrepreneurial characteristics against the general entrepreneurial characteristics</td>
</tr>
<tr>
<td>- Own strengths and weaknesses as a potential tourism entrepreneur are determined</td>
<td>- Determine own strengths and weaknesses as a potential tourism entrepreneur</td>
</tr>
<tr>
<td>- Strategies to address shortcomings are developed and implemented where possible</td>
<td>- Discuss and develop strategies to address shortcomings and implement where possible</td>
</tr>
<tr>
<td>- Enabling programs for the new tourism entrepreneur are identified</td>
<td>- Identify enabling programs for the new tourism entrepreneur</td>
</tr>
<tr>
<td>- Short-term goals for self in entrepreneurial context are determined and discussed</td>
<td>- Articulate short-term goals for self in entrepreneurial context and discuss</td>
</tr>
<tr>
<td>- Medium- and long-term goals are planned and the sustainability of these goals is determined</td>
<td>- Plan medium- and long-term goals and determine the sustainability of these goals</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES

- Use a standard character-analysing quiz from a popular magazine, or based on something similar. (There should be a definite section on entrepreneurial potential)
- Students use a detailed checklist to assess which of their entrepreneurial skills are particularly strong, average, weak, very weak, etc. This is then compared to a general list of accepted important general entrepreneurial characteristics, in order to detect shortfalls
- Short case studies in which various entrepreneurial shortcomings feature; group discussions on possible remedies
- Research assignment to source local or national programmes that exist
- The work on the short, medium and long term goals can tie in with the assessment activity of the improvement strategy, or can be used to extend the discussion relating to the strategy
SUBJECT OUTCOMES

2.4 Explain and demonstrate effective teamwork strategies in a tourism entrepreneurial context

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The concepts of teamwork and how these should be implemented in a tourism enterprise are explained</td>
<td>• Explain the concepts of teamwork and how these should be implemented in a tourism enterprise</td>
</tr>
<tr>
<td>• The characteristics of group dynamics are analysed and examples given of each</td>
<td>• Analyse the characteristics of group dynamics and give examples of each</td>
</tr>
<tr>
<td>• Group roles and stages in team development are identified</td>
<td>• Identify group roles and stages in team development</td>
</tr>
<tr>
<td>• Strategies for effective teamwork and the effects of group dynamics in the tourism workplace are discussed, with examples</td>
<td>• Discuss strategies for effective teamwork and the effects of group dynamics in the tourism workplace, with examples</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Discussions on the various aspects of teamwork, followed by a worksheet on various tourism work situations where the entrepreneur needs to identify lack of teamwork, and suggest possible solutions
• Alternatively, students must source media articles reporting on tourism successes where teamwork was the key to an entrepreneur’s good performance

SUBJECT OUTCOME

2.5 Identify and research the potential for a specific tourism SMME as an own business

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Personal profile is matched to type of work, product or service that has potential as a tourism SMME</td>
<td>• Match personal profile to type of work, product or service that has potential as a tourism SMME</td>
</tr>
<tr>
<td>• Training required to ensure success of tourism SMME is identified and a decision is made relating to when and where to access training</td>
<td>• Identify training required to ensure success of tourism SMME and make a decision relating to when and where to access training</td>
</tr>
<tr>
<td>• The need for the identified tourism product or service and possible competition in a selected area is researched and a decision is made about possible distribution channels</td>
<td>• Research the need for the identified tourism product or service and research possible competition in a selected area and make a decision about possible distribution channels</td>
</tr>
<tr>
<td>• A decision is made and supported regarding a suitable location for a selected SMME</td>
<td>• Make and support a decision regarding a suitable location for a selected SMME</td>
</tr>
<tr>
<td>• Municipal by-laws and other constraints on trade for a selected tourism SMME in a specific location are investigated</td>
<td>• Investigate municipal by-laws and other constraints on trade for a selected tourism SMME in a specific location</td>
</tr>
<tr>
<td>• The importance of networking for an SMME, is explained with examples</td>
<td>• Explain the importance of networking for an SMME, with examples</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Present student with a diagram containing a column of potential tourism SMME jobs, products or services and student must match these to personal profile (compiled during earlier outcomes)
• Student selects one of the above and conducts related research for Learning Outcomes.
• Report-back in written form, or, if orally, against a specific tick-sheet containing specific criteria
• NB If students are totally unfamiliar with the concepts mentioned in these outcomes, group work and work sheets should be used to bridge the gap
• When the report has been delivered, this outcome can serve as a concluding exercise, possibly in the form of a short oral report-back
### SUBJECT OUTCOME

2.6 Identify the risk associated with a tourism-type SMME

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The financial risks encountered by SMMEs are described and tourism-related examples are given</td>
<td>• Describe the financial risks encountered by SMMEs and give tourism-type examples</td>
</tr>
<tr>
<td>• Risks associated with being an employer for a tourism SMME are explained</td>
<td>• Explain risks associated with being an employer for a tourism SMME (Small, Medium, Micro Enterprises)</td>
</tr>
<tr>
<td>• The need for a tourism SMME to market and to advertise is explained and an indication of the associated risks is given</td>
<td>• Explain the need for a tourism SMME to market and to advertise, and give an indication of the associated risks</td>
</tr>
<tr>
<td>• Risks associated with growth are discussed for three different tourism scenarios</td>
<td>• Discuss risks associated with growth for three different tourism scenarios</td>
</tr>
<tr>
<td>• The insurance needs of a specific tourism enterprise are investigated</td>
<td>• Investigate the insurance needs of a specific tourism enterprise</td>
</tr>
<tr>
<td>• The risks associated with stock and other tourism business assets are described and an indication given of possible measures to reduce risk</td>
<td>• Describe the risks associated with stock and other tourism business assets and give an indication of possible measures to reduce the risk</td>
</tr>
</tbody>
</table>

**ASSESSMENT TASKS OR ACTIVITIES**

- Outcomes can best be assessed by means of worksheets combined with case studies to cover the various aspects mentioned.

### SUBJECT OUTCOME

2.7 Explain the financial aspects involved in running a tourism SMME

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The concepts of start up and working capital are explained with reference to a specific tourism SMME</td>
<td>• Explain the concepts of start up and working capital with reference to a specific tourism SMME</td>
</tr>
<tr>
<td>• The relationship between cash flow and profit is explained for three tourism-related case studies</td>
<td>• Explain the relationship between cash flow and profit for three tourism-related case studies</td>
</tr>
<tr>
<td>• Financial controls required to ensure that a tourism business is viable are explained, with examples</td>
<td>• Explain financial controls required to ensure that a tourism business is viable, with examples</td>
</tr>
<tr>
<td>• The implications of poor financial management are explained with tourism-related examples</td>
<td>• Explain the implications of poor financial management, with tourism-related examples</td>
</tr>
<tr>
<td>• The types of contract that a tourism SMME could enter into are listed and contract wording is interpreted and explained in plain language</td>
<td>• Name the types of contract that a tourism SMME could enter into and interpret and explain contract wording in plain language</td>
</tr>
<tr>
<td>• The tax responsibilities of a SMME are explained and an indication is given of when a business is liable for each form of tax</td>
<td>• Explain the tax responsibilities of a SMME and give an indication of when a business is liable for each form of tax</td>
</tr>
</tbody>
</table>

**ASSESSMENT TASKS OR ACTIVITIES**

- Outcomes can best be assessed by means of worksheets combined with case studies to cover the various aspects mentioned. Short research tasks can be added where applicable.
### SUBJECT OUTCOME

#### 2.8 Make and support a decision on whether to establish an SMME in the tourism industry

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>The concept of tourism entrepreneur is explained with reference to risk</td>
<td>Explain the concept of tourism entrepreneur with reference to risk</td>
</tr>
<tr>
<td>Three selected tourism SMMEs are surveyed to investigate the service levels required for success</td>
<td>Survey three selected tourism SMMEs to investigate the service levels required for success</td>
</tr>
<tr>
<td>A decision is made to establish or not to establish a SMME supported by the findings of an investigation</td>
<td>Make a decision to establish or not to establish a SMME supported by the findings of an investigation</td>
</tr>
<tr>
<td>Three selected tourism SMMEs are studied to investigate quality of product/service and potential productivity required for success</td>
<td>Survey three selected tourism SMMEs to investigate quality of product/service and potential productivity required for success</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES

- Describe the types of risk that a tourism entrepreneur could face:
- Compile a report showing and comparing the findings of the survey
- Submit and motivate the decision in writing

### SUBJECT OUTCOME

#### 2.9 Describe the various types of business and the registrations required for a small business in South Africa, concentrating on the tourism industry

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
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</tr>
</thead>
<tbody>
<tr>
<td>The types of small tourism business that are legal in South Africa are described and an indication of the advantages and disadvantages of each is given</td>
<td>Describe the types of small tourism business that are legal in South Africa and give an indication of the advantages and disadvantages of each</td>
</tr>
<tr>
<td>The legal requirements of each kind of business entity is explained and an indication of the cost of registration in each case, is given</td>
<td>Explain the legal requirements of each kind of business entity and give an indication of the cost of registration in each case</td>
</tr>
<tr>
<td>The taxation implications of operating each type of entity are researched and compared and an indication is given of the best type of business in specific circumstances</td>
<td>Research and compare the taxation implications of operating each type of entity and give an indication of the best type of business in specific circumstances</td>
</tr>
<tr>
<td>The principles of input and output VAT are explained and one example of the net/input VAT is calculated (using a case study)</td>
<td>Explain the principles of input and output VAT and calculate one example of the net/input VAT (using a case study)</td>
</tr>
<tr>
<td>Registration with the South African Revenue Service (SARS) is discussed and an indication of the implications of non-compliance is given</td>
<td>Discuss registration with the South African Revenue Service (SARS) and give an indication of the implications of non-compliance</td>
</tr>
<tr>
<td>The current rate of the various taxes paid to SARS are indicated in a table and calculated for one example</td>
<td>Using the case study, indicate in a table the current rate of the various taxes paid to SARS and calculate for one example</td>
</tr>
<tr>
<td>The purpose of the skills levy is discussed and a list of the SETAs that would be applicable to a range of tourism businesses is compiled</td>
<td>Discuss the purpose of the skills levy and compile a list of the SETAs that would be applicable to a range of tourism businesses</td>
</tr>
<tr>
<td>An employer’s responsibility to register and pay for UIF is described and the contributions for a tourism-related business example are calculated</td>
<td>Describe an employer’s responsibility to register and pay for UIF and calculate the contributions for a tourism-related business example</td>
</tr>
<tr>
<td>The purpose of benefits of COID are described, and the amounts due (for a tourism-related business example) are calculated</td>
<td>Describe the purpose of benefits of COID, (Compensation of Occupational Injuries and Diseases Act) and calculate the amounts due for a tourism-related business example</td>
</tr>
<tr>
<td>Tourism industry registrations are identified and the addresses and contact numbers for local registration for own hypothetical type of tourism business are researched</td>
<td>Identify tourism industry registrations and research the addresses and contact numbers for local registration for own hypothetical type of tourism business</td>
</tr>
</tbody>
</table>

#### ASSESSMENT TASKS OR ACTIVITIES

- Outcomes can best be assessed by means of worksheets combined with case studies to cover the various aspects mentioned. Short research tasks can be added where applicable
### SUBJECT OUTCOME

#### 2.10 Discuss the need for market research when starting any new tourism business

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| - The importance of market research in planning a new tourism business is discussed and an indication is given of the dangers of not doing a proper viability research study  
- The typical target market and consumer profile for three tourism businesses are identified  
- The current competition for potential tourism enterprises is investigated in three locations and recommendations are made as to a suitable location | - Discuss the importance of market research in planning a new tourism business and give an indication of the dangers of not doing a proper viability research study  
- Identify the typical target market and consumer profile for three tourism businesses  
- Research the current competition for potential tourism enterprises in three locations and make recommendations as to a suitable location |

<table>
<thead>
<tr>
<th>ASSESSMENT TASKS OR ACTIVITIES</th>
</tr>
</thead>
</table>
| - Case studies and work sheets on aspects of market feasibility study, including marketing information, SWOT analysis and competitive advantage  
- Assignment  
- Project |

### SUBJECT OUTCOME

#### 2.11 Demonstrate knowledge and understanding of the financial aspects of starting a small tourism business

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| - Possible sources of finance for a small tourism business are researched and presented and a decision is made on the advantages and disadvantages of each  
- Possibilities for small business support are investigated in terms of financial, strategy and training needs  
- The issue of providing suretyship for a business loan is discussed and a substantial opinion as to the risk is expressed  
- Financial implications and alternatives for capital asset requirements are discussed in relation to purchasing or leasing premises and a vehicle(s), IT requirements and other business expenses | - Research and present possible sources of finance for a small tourism business and make a decision on the advantages and disadvantages of each  
- Investigate possibilities for small business support in terms of financial, strategy and training needs  
- Discuss the issue of providing suretyship for a business loan and express a substantial opinion as to the risk  
- Discuss financial implications and alternatives for capital asset requirements in relation to purchasing or leasing premises and a vehicle(s), IT requirements and other business expenses |

<table>
<thead>
<tr>
<th>ASSESSMENT TASKS OR ACTIVITIES</th>
</tr>
</thead>
</table>
| - Case studies and worksheets on the various aspects of financial feasibility study (including the importance thereof, start-up costs, fixed assets required etc.)  
- Assignment |

### SUBJECT OUTCOME

#### 2.12 Compile a business plan based on a budget for an SMME

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| - The typical income and expense items are described for at least two different types of tourism SMMEs  
- The purpose of a business plan is explained in relation to evidence of viability of the budget  
- The basic elements of a business plan for a loan application are explained with examples  
- A basic business plan is compiled and presented for a tourism SMME of choice | - Describe the typical income and expense items for at least two different types of tourism SMMEs  
- Explain the purpose of a business plan in relation to evidence of viability of the budget  
- Explain the basic elements of a business plan for a loan application, with examples  
- Compile and present a basic business plan for a tourism SMME of choice |
ASSESSMENT TASKS OR ACTIVITIES

- Continuation of case studies and research relating to feasibility study (determining the expenditure)
- Detailed written exercises covering all the various aspects of a business plan (with accompanying tourism-related case study)
- Student can then attempt to write own case study in which the various aspects gleaned from the previous exercises are used to put it all together.
- As a final assessment, students (individually or in small groups) get to select a potential tourism SMME of choice and must compile and present a basic but detailed business plan

4 SPECIFICATIONS FOR EXTERNAL ASSESSMENT IN TOURISM OPERATIONS - LEVEL 3

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

Two possible approaches to the ISAT may be applied as follows:
- The students could be assigned a task at the beginning of the year which they will have to complete in various phases in the year to obtain part assessment. The final assessment is made at the end of the year upon completion of the task
- The other option is that students will have achieved the competencies through the year but the competencies will be assessed cumulatively in a single assessment/exam session at the end of the year

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

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

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

<table>
<thead>
<tr>
<th>LEVEL 3</th>
<th>KNOWLEDGE AND COMPREHENSION</th>
<th>APPLICATION</th>
<th>ANALYSIS, SYNTHESIS AND EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>40%</td>
<td>30%</td>
<td>30%</td>
</tr>
</tbody>
</table>