

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY
SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

Course Outline: EXECUTIVE OFFICE PROCEDURES

Code No.: OPE 300

Program: EXECUTIVE SECRETARIAL

Semester: THREE .

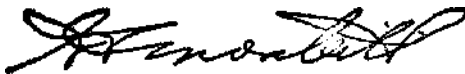
Date: SEPTEMBER, 1985

Author: ELSIE LALONDE

New:

Revision; X

APPROVED:



Chairperson

Date

G E N E R A L S T A T E M E N T S

ASSIGNMENTS:

DUE DATES 100% completion of all assignments is expected. Any class assignment submitted 1-7 days after due date* will be subject to a loss of 20% of the mark given the assignment. No mark will be assigned after the 7th consecutive day the assignment is late.

IN-BASKETS

FIRST SUBMISSION: "S" - Satisfactory
 "C" - Correctable
 T - Unacceptable or Incomplete

No grade will be assigned until second submission - Precedent Binder. However, if items are missing from any In-Basket, the second submission grade of 10% for the binder will be reduced by 1%; if the complete In-Basket is late, a 2% reduction will apply.

SECOND SUBMISSION: A percentage will be assigned subject to any reductions as noted under "FIRST SUBMISSION." If the Precedent Binder is not received on the due date* the student will receive a 2% reduction for each day late from the 10% binder grade..

Examples of type of errors which could result in a "C" or "T":

1. Errors such as -
 - (a) misspelled words
 - (b) punctuation errors
 - (c) unacceptable erasures
 - (d) incomplete documents
 - (e) formatting errors; lack of professionalism in setups
 - (f) proofreading errors
2. Reversal of addressed/sender.
3. No or incorrect echoes or attachments.
4. Incorrect calculations, dates, etc.
5. Construction errors of a serious nature in composition structure.
6. Not properly labeled and submitted.

*Unless a valid reason is provided in advance to instructor and instructor approval is received or the instructor deems the reason given after the due to be a legitimate basis for postponement.

The following grading procedures will be followed for OPE300 and OPE400:

OPE300		OPE400	
TESTS (4):		TESTS:	
Chapters 11, 12, 13 - 10%		3h-Basket 3	10%
Chapters 14, 15, 17 - 20%		1h-Basket 4	10%
Chapters 18, 19, 21 - 10%	if/)	1h-Basket 5	10%
Chapters 22, 23, 7A -		1h-Basket 6	10%
		1h-Basket 7	10%
		Decision-Making #1	5%
		Decision-Making #2	5%
Sub-total	70%		60%
ROUGH DRAFT	10%		10%
CLASS PARTICIPATION & ASSIGNMENTS	10%		10%
DIARY	5%		5%
TIMED WRITINGS	5%		5%
		Binder	10%

TOTAL-100%

Individual segments of the final grade are calculated according to the evaluation procedures outlined in the individual objectives for OPE300 and OPE400 and the GENERAL STATEMENT Page.

NOTE - SEE OBJECTIVE 1 RE ATTENDANCE

DEFINITIONS:

ASSIGNMENTS - SEE OBJECTIVE 4

CLASS PARTICIPATION - QUESTIONS WILL BE ASSIGNED TO STUDENT FOR PREPARATION PRIOR TO APPLICABLE CLASS AND SUBMITTED TO INSTRUCTOR AT CLASS START. QUESTIONS ARE TO BE NEATLY HANDWRITTEN NOT TYPED.

GRADE/NUMERICAL EQUIVALENCIES:

- 85% - 100% OUTSTANDING achievement
- 70% - 84% consistently above average
- 60% - 69% satisfactory or acceptable
- below 60% - REPEAT - THE STUDENT HAS NOT ACHIEVED THE OBJECTIVES OF THE COURSE AND THE COURSE MUST BE REPEATED

TEXTBOOK(S):

Executive Secretarial Procedures

2nd Canadian Edition by Place, Byers, et al, 1981, McGraw-Hill

Accompanying materials - In-Basket and stationery packets for above.

It's All Right Draft

Sar^QSon, 1980, McGraw-Hill

MATERIALS:

- carbon paper
- typing paper (not cotxasahle bond)
- newsprint (for file copies)
- onion paper (for distribution copies)
- erasing material, (duplex eraser, liquid paper, etc.)
- manilla file folders (8-1/2" x 11" letterhead size only) - 8
- file labels
- perpetual diary (may continue using 1985's from OPE200)
- Webster's New World Dictionary, 2nd College Ed. <a: equivalent
- 3-ring binder (2" ring - businesslike and professional in appearance)

Note: Additional stationery for the file-Baskets can be purchased at the Campus Shop.

•HMETABLE

<u>OBJ.</u>	<u>CHAPTER/ASSIGNMENT^ETC.</u>	<u>WK.</u>	<u>DATES</u>
	REGISTRATION LATE REGISTRATION	1	Aug. 26 Aug. 27
	OBJECTIVE REVIEW		First class(s)
1-4	General Objectives Running Full Length of Semester		
5.1	CH. 11 - Word Processing Equipment & System Rough Draft & Timed Writings Cf class not on holiday)	2	Sept. 2 - 6
5.2	CH- 12 - Dictation	3	Sept. 9-13
5.3	CH. 13 - Transcription Rough Draft Timed Writings		
6.1	CH. 14 - Editing & Composing Techniques	4	Sept. 16-20
	TEST #1 - CHAPTERS 11,12, 13		
6.2	CH. 15 - Reprographics Rough Draft Timed Writings	4-5	Sept. 24
6.3	CH. 16 - Researching Information Rough Draft Timed Writings	6	Sept. 26 - Oct. 4
	THANKSGIVING		OCT. 7
7J.	CH. 18 - Preparing Reports & Manuscripts Rough Draft Timed Writings	7	Oct. 8-11
	TEST #2 - CHAPTERS 14, 15, 17	8	Oct. 14-18
7.2	CH. 19 - Supervisory Techniques		
7.3	CH. 21 - Travel Arrangements Rough Drafts Timed Writings	8-9	Oct. 17-24

TIMETABLE

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<u>OBJ,</u>	<u>CHAPTER/ASSIGNMENT,ETC.</u>	<u>WK,</u>	<u>DATES</u>
8.1	CH. 22 - Banking Procedures Rough Draft Timed Writix^	9-10	Oct. 28 - Nov. 1
	TEST #3 - CHAPTERS 18, 19, 21	11	
8.2	CH. 23 " Office Finance Rough Draft Timed Writings	11-13	Nov. 4-22
8.3	CH. 20 - Meetings & Conferences Rough Draft Timed Writings	14-16	Nov. 25 - Dec. 13
	TEST #4 - CHAPTERS 20, 22, 23 Rough Draft Timed Writings	17	Dec, 16-20

CLASSES END - DECEMBER 20, 1985

CHRISTMAS BREAK - Sat. Dec. 21, 1985, to Sun., Jan. 5, 1986 incQusLve

Timetable for OPE400 will be available Jan. 6, 1985

NOTE: THIS TIMETABLE IS SUBJECT TO CHANGE BY INSTRUCTOR IF DEEMED NECESSARY TO ACCOMMODATE TOURS, SPEAKERS, EOIMS, SPECIAL ASSIGNMENTS, OBSOLESCENCE OR ADDITION OF NEW EQUIPMENT OR PROCEDURES, ETC-

OBJECTIVE 1:

Attendance

The student will demonstrate the ability to attend functions during Semester III and IV (examples listed below) and/or provide prior notice with just cause or just cause without prior notice.

NOTICE (prior or post) - shall be given to the instructor in MEMO form in duplicate, signed by the student. If pre-notice, instructor will indicate acceptance or non-acceptance of cause for absenteeism on one copy and return it to the student. Also, valid post-notice should be supported by a record of the student's attempt to contact instructor by one of the following methods: in person, by telephone (school - 949-2050, Ext. 283; residence 256-2725), message left with Secretarial Centre, main switchboard operator, or switchboard message recording device (1-min. message may be left between 4:45 p.m. and 8 a.m.). This will ensure that student can establish contact 24 hours a day regardless of whether student is in or out of the city.

APPLICATIONS

Group I:

- tour/trip/field trips/seminars as arranged by instructor
- guest speakers, presentations, etc.
- films, video, slide presentations (in or out of class time)

Group H:

EVALUATION:

Attendance will be monitored through the use of absenteeism reports in class personnel file or instructor record book

Group I - any absence w/o authorization or just cause will result in the loss of 10% of the total semester cumulative mark for class participation and assignments and rough draft work.

Group H - the highest mark assigned to a delayed test will be a minimum "C" to offset the increased preparation time factor.

There will be no opportunity to write tests in advance of the test day. A student who wishes to write in advance will automatically fall into the delayed test category.

ESTIMATED TIME
TO ACHIEVE:

SEMESTERS BHV
OPE CLASSES

OBJECTIVE 2:

Rough Drafts to Mailable Copy (Speed Building)

Semester III - Given in-class testing on unfamiliar material, of a MEDIUM degree of difficulty selected by instructor from IT'S ALL ROUGH DRAFT (instructor will pre-advise format section), the student will demonstrate the ability to:

- locate and handle written and implied details
- locate and correct spelling errors (dictionaries may be used)
- properly hyphenate (body and line-ending words)
- organize rough draft copy without supervision
- prepare and correct final copy of a full range of correspondence and documents
- work with proofreading symbols
- produce copy of neat appearance (no obvious erasures, smudges, etc.)
- complete a specified quantity of work in a specified time

Semester IV - as above with the unfamiliar material will be of an ADVANCED degree of difficulty.

LEARNING ACTIVITIES

READING ASSIGNMENT - the type of material to be covered will be announced by instructor each week in advance. Students are requested to contact instructor if they have any problems with the reading material,

%

EVALUATION:

Items assigned will be designated a figure grade (e.g. 20 points). The final grade will be the AVERAGE of 85% of the student's marks attained during the semester - the lowest 15% will be dropped (this provides a balance for illness, etc. - however, no additional allowance for absenteeism will be made). The final grade obtained will be used to reflect 10% of the grade for the EOP Course in both semesters.

DEDUCTION SYSTEM

- 0 - if proofreading error found in copy (includes spelling errors)
- Less 4 points - if major format error or proofreading instruction violations found
- Less 2 points - minor format error
- Less 1/2-2 points each unacceptable erasure or smudge
- Less appropriate deduction for incomplete copy

ESTIMATED TIME TO ACHIEVE

Approximately (1) 50-min period
per week (Semesters
III-IV) - 13-17 hrs. total

*copy shall be deemed to be the approximate number of lines equal to the shortest item assigned

OBJECTIVE 3:

Typing Speed

The student will demonstrate the ability to type at 50 gross words per minute by the end of Semester III and 60 gross words per minute by the end of Semester IV on three 5-minute straight copy timings with 98% accuracy or better. OfELdal testing must be supervised by instructor or instructor authorized individual.

Goals by timeframe:

Semester III (mid-term) - 47 gwpm w/98% accuracy on three attempts
Semester III (end) - 50 gwpm w/98% accuracy on three attempts
Semester IV (mid-term) - 55 gwpm w/98% accuracy on three attempts
Semester IV (end) - 60 gwpm w/98% accuracy on three attempts

Note:

1. TIMINGS ACHIEVED IN SEMESTER III ARE NOT TRANSFERRABLE TO SEMESTER IV.
2. THOSE STUDENTS REQUIRING REMEDIAL TRAINING will be assigned speed and accuracy drills. Vdrin tape programs by instructor to assist in attaining the goal. Completion of these assigned drills is mandatory. No further speeds will be recorded if assigned WCB is not completed.

EVALUATION:

Speed - the total number of words or strokes converted to words will be divided by 5 to obtain the gross words per minute.

Accuracy - the total number of accurate words typed (total - not per minute rate) will be divided by the number of words typed,

Example re accuracy: 300 words typed with 295 correct

Accuracy % = 295 divided by 300 = 98.3%. Note: 97.5% or higher does not roll to 98%.

ESTIMATED TIME

TO ACHIEVE:

8 periods of 50 minutes each*

Note - these timings are given in 30-min. sessions.

The world's FASTEST TYPIST (1984) - according to PS for Professional Secretaries, VOL 27, No. 21, Nov. 15, 1984 typed at the rate of 124.8 nwpm.

OBJECTIVE 4:

EOP-^

1

Perpetual Diary

The student will demonstrate the ability to record in a out-of-class situation during the 1985-86 school year the minimum shown below:

1. Dates
 - appointments (dentist, doctor, counselling, placement, instructor, out-of-school wdc commitments
 - tests, assignments, tours, speakers (minimum of OPE300-400)
 - holidays and illnesses as they affect the school year.
 - Occasions - school starting dates, last day of classes, convocation, etc.
2. Record related materials required for any of the above
3. Contents of any of the items 1-2

in a Perpetual Diary of the variety carried by the Campus Shop for this purpose in a businesslike manner.

- * -juggle (to a third party)
- in proper time slot
- equivalent data - eg. name of person and/c organization, telephone if applicable, nature of appointment, materials required
- precisely dated each day (not by week)
- no "trivial" personal listings

and to make use of aids such as calendar references, ready-location index card "clip aff", and telephone listing (to include out-of-class instructors, placement contacts - sd:KxiL aM office).

LEARNING ACTIVITIES & APPLICATION

%

1. Instructor review of method of use.
2. Instructor feedback on OPE300.
3. Daily use by student*

EVALUATION:

The diary will be compared against an instructor checklist with:

- 10) points for general use and organization
- 25-point check (each check will have varying points allotted to reflect content level of recorded item)

Deductions (over and above point system):

- 5 points for each telephone number or spelling error in name or address error

TOTAL - will be converted to a % of 100% - 5% of this converted % will be applied to the final grade for OPE300-400 respectively.

ESTIMATED TIME TO ACHIEVE:

N.A. - IN AND OUT-OF-CLASS TIME CONTRIBUTION DURING SEMESTER DI AND 17.

%

OBJECTIVE 5:

OPE300

Unit 1 - Word Processing Equipment and Systems

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a knowledge of word processing equipment, magnetic media, word processing vocabulary, word processing support systems and careers, and the format and use of a feasibility study.
- Given an out-of-class assignment the student will prepare an electronic typewriter performance sheet*
- Given an in-class and out-of-class assignment which requests the completion of justified text both on an electronic typewriter without justification capabilities and a dedicated WP unit or a mini or micro computer unit with justification capabilities, the student will complete same and prepare a typed comparison chart which compares time, ease (rating 1-10), and finished quality.

LEARNING ACTIVITIES AND APPLICATION

READ:

Pgs. 188-204, CH. 11

Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

- TO BE GIVEN OUT BY INSTRUCTOR

CLASS DISCUSSION:

"Exercising Your Judgements - pgs. 206-7

"Applying the Reference Section"- pg. 207

EVALUATION:

1. Test #1
2. "Reviewing Your Reading" - p. 205, Q. 1-10
- 3* Assignment - Question 3, p. 206 of text w/instructor handouts
- 4, Assignment - Question 4, p. 206 of text

ESTIMATED TIME

TO ACHIEVE:

4 periods of 50-minutes each*

*does not include student reading and assignment time

Umt 2 - Dictation and TranscriiDtLon

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a knowledge of authentic, receiving and transcribing dictation, as well as a familiarity with the most common parts of dictating/transcribing equipment and maintenance of same.
- Given an out-of-class assignment the student will demonstrate the ability to schedule equipment, compose correspondence for dictation using a "planning guide," dictate the assignment using a dictator's checklist, and present it to instructor with all appropriate materials required for transcription.
- Given an in-class setting, the student will demonstrate the ability to edit, transcribe, and present a peer-originated tape as well as prepare a memo to the author offering suggestions on methods to improve future output.

LEARNING OBJECTIVES AND APPLICATION

READ:	Pgs. 20&-218 and Pgs. 222-235, CHs. 12 & 13 <u>Executive Secretarial. Procedures, 2nd Canadian Edition</u>
LECTURE, DEMOS AND HANDOUTS	
PRACTICE ASSIGNMENT	- TO BE GIVEN OUT BY INSTRUCTOR
CLASS DISCUSSION	"Exercising Your Judgement" - p. 220 & 239 "Applying the Reference Section", p. 221 & 229 "Using Your Skills" - pgs 236-7, Qa & 2

%

EVALUATION

1. Test #1
2. "Reviewing Your Reading" - p. 219, Q1--13; pgs. 235-6, Q.1-14
3. Assignment - dictation
- 4* Assignment - Transcription and Presentation

ESTIMATED TIME TO ACHIEVE:

4 periods of 50-minutes each*
1 50-min. test period

*does not include student reading and assignment time

OBJECTIVE 6:

OPE300

Unit 1 - Editing and Composing Techniques

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a knowledge of letter writing skills; will be able to compose business letters (requests and inquiries, acknowledgments, covering and transmittal, referrals, follow-ups, congratulations, invitation/acceptance, regrets, consolation, complaint and adjustment, credit and collection, request).
- (Given an out-of-class assignment the student will prepare a model(s) letters for classroom presentation and critique.

LEARNING ACTIVITIES AND APPLICATION

READ:

Pgs. 240-260, CH. 14

Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

- TO BE GIVEN OUT BY INSTRUCTOR

CLASS DISCUSSION:

"Exercising Your Judgement" - pgs. 262, Q1

"Using Your Skills" - p. 261, Q1-3

"Applying the Reference Section, p. 262, Q1-3

EVALUATION:

1. Test #2
2. "Reviewing Your Reading" - p. 260, Q. 1-14
3. Assignment - Letters for in-class critique

ESTIMATED TIME

TO ACHIEVE:

4 periods of 50-minutes each*

*does not include student reading and assignment time

OBJECTIVE 6:

OPE300 %

Unit 2 - Reprographics

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a knowledge of the essential difference between copiers and duplicators such as spirit, stencil and offset; will be able to know which reproduction process is best for a given duplication need.
- Given an in-out-of-class assignment the student will prepare an acceptable facsimile, offset master, spirit master, use mailing label material on photocopier, and design a cover page for O.P. binder (4th semester) with applicable specifications for a phototypesetter,

LEARNING ACTIVITIES AND APPLICATION

READ: Pgs. 263-279, CH- 15
Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

- TO BE GIVEN OUT BY INSTRUCTOR

CLASS DISCUSSION:

"Exercising Your Judgement" - pgs. 282

"Using Your Skills" - p. 281, Q4

"Applying the Reference Section, p. 282, Q1-2

TOUR - Reprographics Dept. - Sault Ste. Marie (log required)

%

EVALUATION:

1. Test #2
2. "Reviewing Your Reading" - p. 279, Q1-15
- 3* Assignment - "Using Your Skills", p. 281, Q1-3 plus earlier and phototypesetter
4. Log - Repro Dept. Tour

ESTIMATED TIME

TO ACHIEVE;

4 periods of 50-minutes each*

*does not include student reading and assignment time

OBJECTIVE 6:

OPE300

Unit 3 - Researching Information

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a familiarity with a wide range of reference materials used in the research of information; will be able to outline procedures that simplify the search for data in libraries.
- " Given (3) in/out-of-class assignments the student will demonstrate the ability to use the techniques involved in researching information needed by an employer and present it in usable form through the completion of these assignments which require use of most common business reference aids. As a result the student will develop an awareness of the problems and questions that most often plague an employer as he searches for information.

LEARNING ACTIVITIES AND APPLICATION

READ: Pgs. 299-312, CH. 17
Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

"Using Your Skills", p. 313-4, Q1-4

CLASS DISCUSSION:

"Exercising Your Judgement" - p. 314

"Applying the Reference Section", p. 314, Q1-10

TOUR - Library (emphasis on related area information available both in general library stacks and behind circulation desk. Log required.

EVALUATION:

1. Test #2
2. "Reviewing Your Reading" - p. 312-13, Q1-15
3. Assignments - Tutorial Research.
4. Log -Library Tour

ESTIMATED TIME

TO ACHIEVE:

6 periods of 50 minutes each*
1 50-min. test period

*does not include student reading and assignment time

Unit 1 - Planning Reports and Manuscripts

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to respond accordingly to demonstrate a familiarity with the gathering of information/ assisting in the preparation of the outline, organization of content, as well as editing for clarity and correctness.
- Given an in/out-of-class assignment the student will demonstrate the ability to compose a letter requesting permission to reprint an article for use in a class report which includes all the appropriate information for such a request.
- Given an in/out-of-class assignment the student will demonstrate ability in preparing final report reference copy so that it is attractive; correct and clear in terms of front matter, body, and back matter; easily understood and concise in terms of tables and figures to the degree specified in the assignment.
- Given an in/out-of-class assignment the student will demonstrate the ability to prepare tables from data and provide a good visual (facsimile).

LEARNING ACTIVITIES AND APPLICATION

READ:

Pgs. 315-341, CH 18

Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

"Using Your Skills", p. 342-5, Q1-4

CLASS DISCUSSION:

"Exercising Your Judgement" - pg. 345

"Applying the Reference Section", p. 345-6, Q1-4

VISUALS (IF AVAILABLE) - log required

%

EVALUATION:

1. Test #3
2. "Reviewing Your Reading" - p. 341-42, Q1-15
3. Log - Report Videos
4. Assignment - Facsimile of #4 a & b, p. 345
5. Assignment - Report Sample Reference

ESTIMATED TIMETO ACHIEVE:

3 periods of 50-minutes each*

*does not include student reading and assignment time

%

OBJECTIVE 7:

OPE300

Unit 2 - Supervisory Techniques

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to demonstrate an awareness of the secretary's supervisory management potential and the qualities and skills required of those who exercise supervisory responsibilities. As well, the student will demonstrate an understanding of the procedure involved in recruiting, training, and motivating competent subordinates.
- Given an in/out-of-Class assignment the student will demonstrate the ability to complete a personnel office file from application to termination.

LEARNING ACTIVITIES AND APPLICATION

READ:

Pgs. 348-362, CH. 19

Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS
CLASS DISCUSSION

"Using Your Skills", p. 363-5, Q1-4

"Exercising *Year* Judgement" - pg. 366

"Applying the Reference Section", p. 366, Q1-10

GUEST SPEAKER (if available) - log required

EVALUATION:

1. Test #3
2. "Reviewing Your Reading" p. 362-3, Q1-14
3. Log - Guest speaker
4. Personal Personnel File

ESTIMATED TIME

TO ACHIEVE:

3 periods of 50-minutes each*

*does not include student reading and assignment time

Unit 3 - Travel Arrangements

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to interpret and demonstrate the ability to contribute to the planning that precedes the executive's business trips and follow-up the activities required after their completion. As well, the student will demonstrate the ability to research information about domestic and international flights, train, bus, and car rental services so that choices can be made.
- Given an out-of-class assignment the student as a participant in a group will demonstrate the ability to complete all the pre, interm and post paperwork (including calculations) required for an executive-level trip.
- Given an out-of-class assignment the student will demonstrate the ability to prepare a TRAVEL REFERENCE MANUAL for domestic and international use.
- Given an out-of-class assignment as part of a group, the student will prepare a comparison chart with supporting information demonstrating the cost of traveller's cheques based on types of bank accounts at various financial institutions.

LEARNING OBJECTIVES AND APPLICATION

READ:	Pgs. 385-404, CH. 21	%
	<u>Executive Secretarial Procedures, 2nd Canadian Edition</u>	
LECTURE, DEMOS AND HANDOUTS		
PRACTICE ASSIGNMENT	"Using Your Skills", p. 405, Q1, 2 & 4	
CLASS DISCUSSION	"Exercising Your Judgement" - pg. 406	
	"Applying the Reference Section", p. 406, Q1-8	
GUEST SPEAKER (if available) - log required		

EVALUATION:

1. Test #3
2. "Reviewing Your Reading" - p. 404-5, Q1-12
3. Log " Guest Speaker
4. Assignment - pre, interm and post travel paperwork
- So Assignment- TRAVEL REFERENCE MANUAL
- 6- Assignment - Traveller's Cheques

ESTIMATED TIME

TO ACHIEVE:

5 periods of 50-minutes each*
1 50-minute test period

*does not included student reading and assignment time

OBJECTIVE 8:

"^
OPE300

Unit 1 - Banking Procedures

- Given an in-class test containing questions and examples (student will be informed of type of testing format prior to testing), the student will be able to:

*list define and/or relate to questions on Promissory Instruments and the range of banking sendees.

^demonstrate the ability to prepare checks and manage an executive cheque book; use blank, restrictive and full endorsements, compute interest charges and interpret current financial information from newspaper.

LEARNING ACTIVITIES AND APPLICATION

READ:

Pgs. 407-426, CH. 22

Executive Secretarial Procedures, 2nd Canadian Edition

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

"Using Your Skills", p. 427, Q1-4

CLASS DISCUSSION

"Exercising Your Judgement" - p. 427

"Applying the Reference Section", p.428, Q1-3

GUEST SPEAKER (if available) - log required

EVALUATION:

1. Test #4

2. "Reviewing Your Reading" - p. 426, Q1-15

3. Log - Guest Speaker

ESTIMATED TIME

TO ACHIEVE:

4 periods of 50-minutes each*

*does not include student reading and assignment time

OBJECTIVE 8:

OPE300

Unit 2 - Office Finance

- Given an in-class test containing questions and examples (student will be informed of type testing format prior to testing), the student will be able to:
 - identify current assets, fixed assets, liabilities, shareholder equity, net working capital, current ratio, gross profit percentage, net profit ratio,
 - list budget considerations
 - prepare and modify a budget report
 - describe the characteristics of the following terms - STOCK: common, preferred, share values, leverage factor; BONDS: coupon, registered, collateral trust bonds, debenture bonds, convertible bonds.
 - define role and responsibilities of investment broker
 - interpret stock, bond, and commodity listings and compute change in a given investment
 - record purchases and sales of security on appropriate record forms
 - define, list and/or relate various types of business insurance
 - record appropriate information on insurance records
 - interpret federal income tax, pension, and U.J.C. tables and compute appropriate deductions
 - prepare and/or file all paperwork for submission of tax, pension and UXC.

LEARNING ACTIVITIES AND APPLICATION

- READ: Pgs. 429-452, CH. 23
Executive Secretarial Procedures, 2nd Canadian Edition %
- LECTURE, DEMOS AND HANDOUTS
PRACTICE ASSIGNMENT - as given out by instructor
- U.Y.S, p. 453, #1 or substitute
- CLASS DISCUSSION "Exercising Your Judgement" - p. 454
"Analyzing the Reference Section", p. 454, Q1-2
- GUEST SPEAKER (if available) - log required

EVALUATION:

1. Test #4
2. "Reviving Your Reading" - p. 453, Q1-15
3. Log - Guest Speaker
4. Assignment on Payroll Deductions (Optional)

ESTIMATED TIME TO ACHIEVE

11 periods of 50-minutes each

- does not include student reading and assignment time

OBJECTIVE 8:

OPE300

Unit 3 - Meeting and Conferaices

- Given an in-class test containing questions and examples (student will be informed of type testing format prior to testing), the student will be able to:
 - *define common meeting terms
 - *describe "aids" in the preparation of agendas, notification of meeting participants and actual recording of minutes/ follow-up of meeting
 - *describe considerations in assembling a committee
 - *describe considerations as they relate to conference and meeting setups - location, cost, environment, physical setup
 - *list measures to control "time" in a meeting
 - ^prepare a checklist of most common areas of a meeting for which a secretary may be responsible
 - *describe the difference between a "resolution" and a "petition"
 - *describe the difference between an "ad hoc" committee and a "standing" committee"
 - *record a motion
 - ^define in layman's terms the basic terms used as a participant in a formal meeting
 - *list 4-8 common practices that reduce the productivity of most meetings
 - ^suggest the format of minutes of meeting which best serve a specific need
- Given an in/out-of-class assignment the student will draft either a petition or a resolution
- Given an in/out-of-class assignment the student will prepare a motion form, prepare a motion, ensure the form is completely filled out
- Given an out-of-class assignment the student will prepare a conference meeting, etc. community reference activity scrapbook
- Given an out-of-class assignment the students will incorporate a corporation (no duplication allowed requesting a copy of the company bylaws, a copy of their last annual report and a copy of the minutes of their annual meeting),

LEARNING ACTIVITIES AND ASSIGNMENT

- READ: Pgs. 367-382, CH. 20
Executive Secretarial Procedures, 2nd Canadian Edition
- LECTURE, DEMOS AND HANDOUTS
- PRACTICE ASSIGNMENT - as given out by instructor
- CLASS DISCUSSION "Exercising Your Judgement" - p. 384
"Adjusting the Reference Section", p.384, Q1-8
- GUEST SPEAKER (if available) - idg required

EVALUATION:

1. Test #4
2. "Reviewing Your Reading" - p. 382, Q1-13
3. Log - Guest Speaker
4. Assignment PETITION or RESOLUTION
5. Letter and response re request for bylaws, etc,
6. Conference Scrapbook
7. Motion Form and Motion

ESTIMATED TIME

TO ACQUIRE:

12 periods of 50-minutes each*
2 period for testing

