



EXECUTIVE OFFICE PROCEDURES- OPE300-400

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EXECUTIVE OFFICE PROCEDURES

Course Number

OPE300-400

Course Number

COURSE PREREQUISITES:

Prerequisite for OPE300 - OPE200

Prerequisite for OPE400 - OPE300

GENERAL OBJECTIVES

To prepare the student whose career plans include eventually working as a top-notch executive secretary through the introduction of the primary duties of professional secretaries, including emphasis on the essential non-technical skills such as decision-making, the exercise of initiative, thoroughness, working with people and effective management of time and materials.

To prepare the student to perform as a management assistant who understands business operations and techniques of management.

SPECIFIC OBJECTIVES - SEE "UNITS"

## GENERAL STATEMENTS

## ASSIGNMENTS:

DUE 100% completion of all assignments is expected. Any class assignment  
DATES submitted 1-7 days after due date\* will result 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 - 4TH SEMESTER ONLY

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 (THESE % REDUCTIONS APPLY TO EACH LATE APPLICATION. PARTIAL IN-BASKETS WILL HAVE THE REDUCTION PRORATED ACCORDINGLY.)

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 addressee/sender.
3. No or incorrect copies or attachments.
4. Incorrect calculations, dates, etc.
5. Construction errors of a serious nature in composition structure,
6. Not properly labelled and submitted.

\*Whenever 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 procedure will be followed for OPE300 and OPE400:

OPE300		OPE400	
TESTS (4):		TESTS:	
Meeting - Hemi	5%	In-Basket 1 -	S/U
		In-Basket 2 -	5%
		In-Basket 3 -	10%
Meeting- Text- (3x5%)	15%	In-Basket 4	10%
Filing (av. tests)	10%	In-Basket 5	10%
Direct Mail	5%	In-Basket 6	10%
Travel	10%	In-Basket 7	10%
Taxation	10%	Decision-Making #1	5%
Ansley Simulation	15%	Decision-Making #2	5%
Sub-total	70%	Sub-total	65%
ROUGH DRAFT	10%	ROUGH DRAFT	5%
CLASS PARTICIPATION & ASSIGNMENTS 15%		CLASS PARTICIPATION & ASSIGNMENTS 10	
-Travel Binder, Travel Cheques, Inc. Tax Pkg.r Meeting/Conf, Binder, Logs, etc. as listed in objectives			
DIARY - to be maintained but mark recorded in Semester IV			<b>5%</b>
TIMED WRITINGS	<b>5%</b>		5%
		Binder	10%
TOTAL- 100%			

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

NOTE - SEE OBJ. 1 RE ATTENDANCE

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):

Semester nr

Progressive Filing Practice Set (ninth edition)  
Ricks-Gow, 1984 - South Western

NOTE - Student will pay the required cost of this item to the Campus Book Shop for which they will receive a receipt with THEIR OWN NAME recorded on it. The student will then present this to the instructor at the first HaGR of the semester and will be given the kit. The first test on this material will be Sept, 9 after (6) jobs have been completed and checked, therefore, it is mandatory that the kit be purchased prior to that date or the student will not be allowed to take Test #1. (There are no delayed tests allowed in this segment of the course.)

The textbook which accompanies this series is not required, however, a copy will be on reserve in the college library at the Circulation Desk under the name of Elsie Lalonde for reference purposes.

The Meeting Will Come to Order  
Central Michigan University

The Successful Meeting Master Guide  
Palmer & Palmer, 1983, Prentice Hall

Pine Tree Resorts  
Kowalchuk & Lyons, 1986, Copp Clark Pitman Ltd.

Ansley House Assonates - The Executive Secretary (An office simulation)  
McIntosh, Welter, 1986, South-Western (distributed through Gage)

Standard Payroll Project, Nanya, 1983, Glenco Publishing (Pending - not presently available.)

REFERENCE TEXTS ONLY (NOT REQUIRED TO PURCHASE)

Contemporary Office Procedures  
Attridge & Cunningham, 1983, McGraw-Hill (1985-6 OPC100-200 text)

Executive Secretarial, Procedures  
2nd Canadian Edition by Place, Byers, et al, 1981, McGraw-Hill  
(1985-86 student or perhaps copy in college library or Secretarial Centre library)

Business Communications, A Problem Solving Approach  
2nd edition by Poe & Fruehling, 1978, McGraw-Hill  
(Sault College Library Circulation Desk under name Elsie Lalonde - one-day loan basis in-library use only)

SEMESTER IV

Accompanying materials div-Basket and Stationery Packets) - Executive Secretarial Office Procedures

Note - extra stationery can be purchased from the Campus Books Store; and additional forms, etc., can be obtained from instructor.

MATERIALS (COMMON TO SEMESTERS IE & IV):

- carbon paper
- typing paper (not corrasabla bond)
- newsprint (for file cc^iies)
- onionskin (for distribution copies)
- erasing material (duplex eraser, Hquid paper, etc.)
- maniUa file fcOders (8-1/2" x 11" letterhead size only) - 12  
(no assignments will be accepted with a file folder properly labelled)
- file labels
- perpetual diary (may continue using 1986\*s from OPE200)
- Webster's New World Dictionary, 2nd College Ed. or equivalent
- <3) 3~ring tander (2" ring - busine^like and professional in appearance)

HMSTABLE

<u>CHAPTER/ASaCGNMENT.ETC.</u>	<u>WK.</u>	<u>DATES</u>
Review Objectives & Assign Filing Jobs	1	Aug. 26
Intro- to Rough Draft & Timings		Aug. 27
Ttavel - Lecture on Pre Arrangements		Aug. 27
Analey Ih-Basket - Packet #1 - review procedure		Aug. 29
Filing	2	Sept. 2
Meetings - Films - Meetings, Bloody Meetings - Parlimentary Rules		Sept- 3
Rough Draft		Sept. 3
Travel - Lecture on Pre Arrangements		Sept. 5
Analey In-Basket - Packet #1, <i>Items</i> a,b,c.		Sept. 5
Filing	3	Sept. 9
Meetings - HEMI - Video & Lecture		Sept, 10
Rough Draft & Timings		Sept. 10
Travel - Lecture on International		Sept. 12
Ansley m-Basket - Packet #1, <i>Items</i> d,e,f Packet #1 - Item g (out-of-dass)		Sept. 12
Filing	4	Sept. 16
Meetings - HEMI - Video 5c Lecture		Sept. 17
Rough Draft		Sept. 17
Travel - Lecture - International		Sept. 19
Analey In-Basket - Packet #1 - Due Packet #2 - Review Procedures		Sept. 19
Filing	5	Sept. 23
Meetings - TEST ON HEMI		Sept, 24
Rough Draft & Timings		Sept. 24
Travel - Lecture on Post Arrangements		Sept. 26
Ansley lii-Basket - Packet #2, <i>Items</i> a,b,c		Sept, 26
Filing	6	Sept, 30
Meetings - Text (Successful . . . ), Chs. 1 & 2		Oct. 1
Rough Draft		Oct, 1
Travel - Guest Speaker- attendance mandatory		Oct. 3
Analey In-Basket - Packet #2, <i>Items</i> d,e,f Packet #2, Item g (out-of-dass)		Oct, 3
		Oct. 3
FiUng	7	Oct, 7
Meeting - Text (Succe^ful . . . ), Chs. 3 & 4		Oct. 8
Rough Draft & Timings		Oct. 8
Travel - TEST		Oct, 10
Analey Ih-Basket - Packet #2 - Due - Packet #3, <i>Items</i> a,b,c		Oct, 10
		Oct. 10



<u>CHAPTER/ASSIGNMENT, ETC.</u>	<u>WK.</u>	<u>DATES</u>
Filing	8	Oct. 14
Meeting - Text (Successful . . . ), Chs. 5 & 6		Oct, 15
Rough Draft		Oct, 15
Direct Mail - Speaker (Canada Post) - attendance mandatory		Oct, 17
Ansely In-Basket - Packet #3 - Items d,e^		Oct, 17
Packet #3 - Item g (out-of-class)		Oct, 17
Filing	9	Oct. 21
Meeting - Text (Successful. . . ) TEST CHS. 1-6		Oct. 22
Rough Draft & Timings		Oct. 22
Direct Mail - Lecture		Oct, 24
Ansely In-Basket - Packet #3 - due		Oct, 24
- Packet #4r Items a, b		Oct. 24
Filing	10	Oct, 28
Meeting - Text (Successful . . . ), Chs, 7, 8 & 9		Oct. 30
Rough Draft		Oct, 30
Direct Mail - Lecture or TEST		Oct, 31
Ansely In-Basket - Packet #4, Items cA		Oct. 31
Filing	11	Nov. 4
Meetings - Text (Successful . . . ), Chs, 10 & II		Nov. 5
Rough Draft & Timings		Nov. 5
Taxation - Guest Speaker(s) Revenue Canada - attendance mandatory		Nov. 7
Ansely In-Basket - Packet #4, Items e,f		Nov. 7
Filing	12	Nov. 11
Meetings - Text (Successful . . . ), Chs, 12 & 13		Nov. 12
Rough Draft		Nov. 12
Taxation - lecture and/or practical		Nov. 14
Ansely In-Basket - Packet #4, Items g,h		Nov. 14
Filing	13	Nov. 18
Meetings - Text (Successful . . . ) TEST - Chs. 7-13		Nov. 19
Rough Draft & Timings		Nov. 19
Taxation - lecture and/or practical		Nov. 21
Ansely In-Basket - Packet #4 - due		Nov. 21
- Packet- #5 - arb		Nov. 21
Filing	14	Nov. 25
Meetings - Text (Successful . . . ), Chs. 14 & 15		Nov. 26
Rough Draft		Nov. 26
Taxation - lecture and/or practical		Nov. 28
Ansely In-Basket - Packet #5^ Items cA		Nov. 28

<u>CHAPTER/ASSEGNMENT, ETC.</u>	<u>WK.</u>	<u>DATES</u>
Ming	15	Dec, 2
Meetings - Text (Successful . . . ), Chs. 16 & 17		Dec. 3
Rough Draft & Tiinings		Dec. 3
Taxation - lecture and/or practical		Dec. 5
Ansely In-Baslctet - Packet #5, JQzems e^f		Dec. 5
Ming	16	Dec. 9
Meetings - Text (Successful), Chs. 18 & 19		Dec. 10
Rough Draft		Dec. 10
Taxation - lecture and/or practical		Dec. 12
Ansely In-BasJcet - Packet #5, Items g,h		Dec. 12
Ming	17	Dec. 16
Meetings - Text (Successful) TEST, Chs. 14-19		Dec. 17
Rough Draft & Timings		Dec. 17
Taxation - TEST		Dec. 19
Ansley li>-Basket - Packet #5, Items i^j		Dec. 19
Packet #5 - due		Dec. 19

NOTE: THIS TIMETABLE IS SUBJECT TO CHANGE BY INSTRUCTOR WITH LITTLE OR NO PRIOR NOTICE TO ACCOMMODATE ADDITION, SUBSTITUTION OR CANCELLATION OF TOURS, SPEAKERS, FILMS, SPECIAL ASSIGNMENTS, OR LECTURE MATERIAL (DUE TO OBSOLESCENCE), ETC.

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:

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

Group II

- tests

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 II - 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 TIMES  
TO ACHIEVE:

SEMESTERS UI-B/  
OPE CLASSES

OBJECTIVE 2:

PG. 6  
EOP-300-400

(  
)

Rough Drafts to Mailable Copy (Speed Building)

Semester in - Given irt-dass tasting on unfamiliar material of a MEDIUM degree of difficulty selected by instructor from PINE TREE RESORTS, 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 decisions)
- 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 ^eci,fied quantity of work in a ^ecifi,ed tune
- use thinidng skills to produce acceptable office-standard material

Semester 17 - as above but the unfamiliar material will be of an ADVANCED degree of di.fficulby.

LEARNING ACTIVITIES

READING ASSIGNMENT - it is suggested the student review the types of material found in the text and check out any problems with current typing or office procedures texts.

EVALUATION:

Items assigned will be designated a figure grade (e.g. 20 points). The final grade will be the AVERAGE of 90% of the student's marks attained during the semester - the lowest 10% 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 far the EOP Course in both semesters.

DEDUCTION SYSTEM

- 0 - if proofreading error found in cc^y\* (includes ^jelling errors)
- Less 4 points - if majca: format error or proofreading instruct±3n omission error found
- Less 2 points - minor format error
- Less 1/2-2 points each unacceptable erasure or smudge
- Less aEpropdate deduction for incomplete cc^y
- Less 8 pts. if ^3enfic instruction (see paperdipped sections in text) not adhered to

ESTIMATED TIME

TO ACHIEVE:

Approximately (1) 50-min perLod  
per week (Semesters  
H-IV) - 13-17 hrs, total

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

OBJECTIVS 3;

PG. 7  
EOP-300-400

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 typings with 98% accuracy or better. Official 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 drill/tape programs by instructor to assist in attaining the goal. Completion of these aligned drills is mandatory. No further tests will be recorded if assigned work is not completed.
3. No in-class practice time is available - instructor will try and find a room and time for out-of-class group practice. Individual practice - see S- Boushear.

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 5 errors

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

ESTIMATED TIME

TO ACHIEVE:

3 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:

PG. 8  
EOP-300-400

Perpetual Diary

The student will demonstrate the ability to record in a out-of-class situation during the 1986-87 school year the minimum shown below:

1. Dates -appointments (dentist, doctor, counselling, placement^ instructor, out-of-school work commitments  
-tests, assignments, tours, ^akers Cminimum of OPE300-400 )  
-holidays and illness 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- Cancellations of any of the S^ms 1-2

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

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

and to make use of aids such as calendar references, ready-location corner "dip-offs", and telephone listing (to include college instructors, placement contacts - school and 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 HI AND 17.

Unit - 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 trip and the follow-up activities required on 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 appropriate choices can be made.
- Given an in/out-of-class assignment the student as a participant in a group will demonstrate the ability to complete all the pre, interim and post paperwork (including calculations) required for an executive-level trip. -
- Given an in/out-of-class assignment the student will demonstrate the ability to prepare a TRAVEL REFERENCE MANUAL for domestic.
- Given an in/out-of-class assignment as part of a group, the student will prepare a companion chart with supporting information demonstrating the cost of traveller's cheques based on various types of bank accounts at different financial institutions.

LEARNING ACTIVITIES AND APPLICATION

READ: Pgs, 255-277  
Contemporary Office Procedures

LECTURES, DEMOS AND HANDOUTS  
CLASS DISCUSSIONS  
GUEST SPEAKER (IF AVAILABLE) - LOG REQUIRED

EVALUATION:

1. Test
2. Log - Guest Speaker
3. Assignment - pre, interim and post travel paperwork
4. Assignment - TRAVEL REFERENCE MANUAL
5. Assignment - Traveller's Cheques

ESTIMATED TIME

TO ACHIEVE:

6 periods of 50-minutes each\*  
1 50-minute test period

\*does not include student reading and assignment time

UNIT - Direct Mail

- Given an in-class test containing essay questions and applications the student will be able to respond accordingly to demonstrate a familiarity with the benefits, procedures, etc., of Direct Mail (Canada Post) and advertising agencies.

LEARNING ACTIVITIES AND APPLICATION

LECTURE

HANDOUTS - D.M. Contacts

GUEST SPEAKER - Canada Post Northern Region Rep  
Quiz on speaker's input

EVALUATION

1. Test

ESTIMATED TIME

TO ACHIEVE:

2 periods of 50 minutes each  
1 50-minute test period



OBJECTIVE 7:

PG. 11  
OPE300

Unit 1 - OffHne Finance

- Given an in-class test containing questions and examples (student wiU be informed of type test±ig format prior to testing), the student wiH be able to:
  - interpret federal income tax,, pension, and UXC. tahlp and compute appropriate deductions
  - prepare and/or fiig> all paperwork for submission of tax, pension and UXC.

LEARNING ACTIVITIES AND APPLICATION

READ: Pgs. 42^452, CH. 23  
Executive Secretarial Procedures, 2nd Canadian Edition

or Pgs, 542-551  
Contemporary Offi.ce Procedures

LECTURE , DEMOS AND HANDOUTS  
PRACTICE ASSIGNLMENT

- as given out by instructor
- Standard Payrdl Project (modified for Canadian application)

GUEST SPEAKER (iE available) - REVEiSIUE CANADA, TAXATION CENTRE, SUDBURY OFFICE

EVALUATION:

1. Test
2. Assignment on Payroll Deductions {Optional}

ESTIMATED TIME

TO ACHIEVE:

8 periods of 50-minutes each\*

\*does not included student reading and assignment time

Unit " In-Baskets (medium difficulty)

-Given in/out-of-class In-Basket work the student will demonstrate the ability to employ medium levels of cognitive abilities through the completion of accurate finished work.

Cognitive abilities include:

- \* an understanding of assigned task
- \* using previously learned competencies in new situations
- \* gathering facts from various sources and determining course of action
- \* judging which data or action is appropriate for a given situation

LEARNING ACTIVITIES AND APPLICATIONS

Instructor review and ongoing assistance as In-Baskets are completed. Then, feedback after In-Baskets has been turned in.

Completion of In-Baskets - Ansley House Associates

Students are recommended to complete the major portion of In-Basket work in class so instructor can observe work and make last-minute changes (as is normal in the work environment - onus is on student to be aware of any changes). Also, remember that quality of finished product will be judged. If material is completed on poor equipment, it will be judged that the student assumes this to be business quality and marks will be deducted accordingly.

EVALUATION;

In-Basket work will be evaluated per Work Evaluation Check Sheet(s) in work package and the average of the (5) packets will count 20% towards final mark.

.ESTIMATED TIMES TO ACHIEVE; 17 in-class periods plus 15 out-of-class periods max.

OBJECTIVE 3:

PG. 13  
OPE300

Unit - Meeting and Conferences

- 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, 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 4-6 common problems 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 select 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 APPLICATION

READ: The Successful Meeting Master Guide  
The Meeting Will Come to Order  
VIEW: HEMI- MEETING Video

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT - as given out by instructor

CLASS DISCUSSION

GUEST SPEAKER (if available) -log required

EVALUATION:

1. Test
2. Log - Guest Speaker (if applicable)
3. Assignment PETITION or RESOLUTION (instructor will provide paper - additional copies must be purchased by student from office supply store.
4. Letter and request for bylaws, etc,
5. Conference Scrapbook
6. Motion Form and Motion
7. Record minutes of meeting for outside association (out-of-class and subject to ability of instructor to obtain openings for students).

ESTIMATED TIME

TO ACHIEVE:

15 periods of 50-minutes each\*  
2 period for testing

•does not include student reading and assignment time

OBJECTIVE 10:

PG, 14  
OPE300

UNIT - FILING

-Given finding and theory questions related to the material found in the student practice Jcit, the student will demonstrate a minimum of 60% competency in the following filing areas:

- alphabetic filing rules
- alphabetic correspondence filing
- subject correspondence filing
- numeric filing systems
- geographic filing systems

LEARNING ACTIVITIES:

Progressive Filing Practice Set {ninth edition}  
Ristics-Gow, 1984 (South-Western)

EVALUATION:

(SEE FILING TEST WEIGHTING BREAKDOWN PG. 14.5) - 10% of final grade

ESTIMATED TIME

TO ACHIEVE:

17 periods of 50-minutes each (including testing)

## FIUNG AND APPIXCATION SECTION OF COURSE

METHOD OF PRESENTATION

- bdef overview cf rules and guidelines
- provision of additional reference sources
- in-claFfs assistance before and after student has completed assignments in the hands-on filing practice set

TESTING METHODS

Two types of testing will be used:

- (a) Finding Quizzes- student to locate material from own uncheckKed files within a specified time limit.
- (b) Theory application - student will 1:^ provided with examples of items to be filed and will be required to sort into prc^jer filing order^^or, will respond to questions on filing termindlDgy,
- (c) Number of questions and estimated testing time:

<u>TEST</u>	<u>COVERAGE AREA</u>	<u>FINDING</u>	<u>APPLYING</u>	<u>TIME</u>
1	ALPHABETIC INDEXING	15	25	1/2 HR,
2	ALPHABETIC INDEXING	15	25	V 2 HR
3	ALPHABETIC INDEXING	15	25	1/2 HR,
4	ALPHA CORRESPONDENCE	15	18	1/2 HR,
5	SUBJECT CORRESPONDENCE	10	15	1/2 HR,
6	NUMERIC CARD	50	35	V 2 HR,
7	GEOGRAPHIC	N.A.	15	15 MIN,
a	FINAL		50	35 MIN,

SPECIFIC OBJECTIVES

Given the tests covering the subject areas outlined above, the student will within the ^3ecifi,ed time respond to a minimum with 60% accuracy on (5) out of (7) tests. Note - the final test will not be one of the test marks dropped. Any mark below 60% win. be recorded as a 0% as this would mean the student has not reached even a introductory level of competency.

## TESTING AND CLASSWORK DUE DATE SCHEDULE

## NOTE;

1. All jobs must be completed by the due date shown or the student will be unable to participate in the "finding" tests since these tests are based on their classwork packages.
2. Work cannot be done in advance of schedule as this will totally destroy the sequence for finding tests. The onus is on the student to adhere to this regulation.
3. As a word of warning, due to the tightly integrated nature of classwork and testing, it is doubtful that any student missing more than 20% (3 classes) will be able to maintain classwork in such a manner as to keep up with testing schedule. Since this course is set up to match a work environment, the evaluation of the student's ability to complete work on schedule is essential, to establishing the student's competency; but—more importantly—the DEPENDABILITY to meet deadlines.

JOB	STATUS	CLASS	HOMEWORK	DUE	FINDING	QUIZ
1		Ass. Aug. 26	Aug. 26-Sept. 2	Sept. 2		
2						
3	—					
4						
5		Sept, 2	Balance	Sept, 9		
6						
7	—					
Rev. 1-6		Sept. 9			Sept, 9	
9	—	Sept. 9	Balance	Sept. 16		
8						
10		Sept. 16	Balance	Sept, 23		<b>Sept, !</b>
11						
12						
13		Sept. 23	Balance	Sept. 30		
14						

JOB	STATUS	IN CLASS	HOMEWORK	DUE	FINDING	QUIZ
15					Sept. 30	
17	Rev. 9 - ^		Balance	Oct. 7		
18		Sept. 30				
16						Oct, 7
19			Balance	^ Oct. 14		
20		Get. 7				
21					Q&tm i4	Oct. 14
23	Rev. 14-21	Oct. 14				
24	N.A.					
25			Balance	Oct. 21		
26						
27						
28						
22						Oct. 21
29		Oct, 21	Balance		Ofri^ ZI	
30	N.A.					
31	Rev. 23-28					"Oct. 23
32						
33		Oct. 28	Balance	Nov. 4		
34						
35						
36		Nov. 4	Balance	Nov, 11		
37						
38					Nov 11	
39	Rev. 3M7					
41	N.A.		Balance	Nov. 25		
42		Nov. 11				

JOB	STATUS	IN CLASS	HOMEWORK	DUE	FINDING	QUIZ
40	Z I					Nov. 2 5
43					Nov. 25	
44	N.A.					
	Rev. 41-42					
45		Nov. 25	Balance	Dec. 2		
46					Uac^ 2	
	Rv. 45					
47	N.A,					
^^	—	Dec. 2	Balance	Dec. 2		
^^	—			in-class	^ecv 2	
48						Dec. 2
51	N.A,					
52		B^c. 9"	Balance	Dec. 16		
53						
	Rv. 46-53					
54		Dec. 16				Dec
55						Dec, 16
	(FINAL)					

^JS^k1SM^?3^i^i^\* DELAYED FINAL (MAX. "C")



FILING TEST WEIGHTING BREAKDOWN

TEST NO,	FINDING SCORES	APPLIED THEORY SCORES
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TOTALS (LESS LOW TWO)	(	(
AVERAGE (DIVIDE BY SIX)	(	(
WEIGHTING (MULTIP!^ BY)	25%	75%
ADD TWO TOTALS = FINAL GRADE		

NOTE:

To offset sickness lowest (2) marks in Category A and B will be dropped with exception of #3 (FINAL THEORY). No delayed tests will be allowed. In the event of a prolonged illness it will be at teacher's discretion only and with a doctor's slip verifying illness as to whether it is possible for student to catch up missed portions of work. However, due to tightness of time Tutations in most cases it will be highly unlikely that it will be possible for a student to make up lost time.

SEMESTER II PROPOSED COVERAGE (OBJECTIVES PENDING)  
1986-87 OPE400

16-WEEK SCHEDULE

RCXJGH DRAFT - (1) HOUR PER WEEK

(7) IN-BASKETS PLUS (5) TWO-HOUR TESTS - APPROX. 2 HRS. CLASS TIME FOR WORK  
(20 HRS. IN-CLASS PRACTICAL AND 12 HRS. TESTING TIME)

PROJECTS: - SPREAD OUT OVER 16 WEEKS IN ONE-HOUR PERIODS:

PERSONNEL {INCLUDING TESTING)	4 HRS.
SOCIAL BUSINESS LETTERS - (EVALUATE ON PRODUCTION)	4 HRS.
REPROGRAPHICS (INCLUDING TEST)	4 HRS.
AUTOMATING THE OFFICE & TESTS	9 HRS.
REFERENTIAL RESEARCH - OUT-OF-CLASS EXCEPT	
(1) HR. SPECIAL LIBRARY TOUR	
(1) HR. INSTRUCTOR PREPARATION ASSISTANCE	2 HRS.
DICTATION PROJECT (2 OUT-OF-CLASS) PLUS	2 HRS.
DECISION PACKAGES (FOLLOW COMPLETION OF LAST IN-BASKET)	6 HRS.
TOTAL	31-32 HOURS,

SPEED & ACCURACY - OUT-OF-CLASS ONLY

NO TIME CAN BE SET UNTIL NEXT SEMESTER'S TIMETABLE IS KNOWN.  
SUBJECT TO CHANGE WHEN 1987 OPE400 OBJECTIVES ARE PREPARED

Unit " Autorating the Office

-Given a test at the completion of each video presentation, the student will dononstrate the ability to review, record and recall information relative to the various aspects of a modern office - computer, word processing, telecoimini cations networking, etc. (This objective is airred at providing the student with the oppoortunity of being exposed to an "information finding" session such as may be required of a secretary should the employer not desire or cannot attend various business presentations.)

LEARNING ACTIVITIES AND APPLICATIONS:

Video Presentations  
Class Discussion

EVALUATION;

Tests (NU^EER APPLICABLE TO NUS5BER OF PRESENTATIONS)  
(Note - lowest test will be dropped - no rewrites or allowance for absenteeism)

ESTIMATED TIME TO ACHIEVE:

(9) in-class periods

OBJECTIVE 12:

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OPE400

Unit - Researching Information

- Given (10) 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

SUPPLEMENTARY READING

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

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

Instructor will Provide

CLASS DISCUSSION:

Applying the Reference Section", p. 312-314 Q-1-10

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

EVALUATION:

1. Assignment - Library Research.

ESTIMATED TIME

TO ACHIEVE:

2 periods of 50-minutes each=

\*does not include student reading and assignment time

Unit - Editing and Composing

Given an out-of-class assignment the student will demonstrate ability to prepare model letters for classroom presentation and critic. Through these letters the student will be able to show ability to respond according to specific area exhibiting a knowledge of letter writing skills and composition of business and social business letters in such areas as requesting material, acknowledgments, copyright privilege, covering and transmittal letters, letters of referral, follow-up, congratulations on appointments, etc, invitations/acceptance and/or regret, consolation, etc.

LEARNIMS ACTIVITIES AND APPLICATIONS

LECTURE	INSTRUCTOR WILL - present general information required using as a reference <u>Business Communications, A Problem Solving Approach, 2nd Ed.</u>
HANDOUTS	to be provided by instructor
PRACTICE ASSIGNMENT	to be provided by instructor

EVALUTATION:

1. Assignment - letters for in-class critic

ESTIMATED TIME TO ACHIEVE:

(4) periods of 50-minutes each\*

\*does not include assignment time

Unit - Reprographics

Given appropriate in-class assignments the student will demonstrate ability to produce visuals or printed material in the following areas:

- transparency from typed copy (will include a table)
- combination of handwriting, printing and drawing w/transparency pen
- mount and storage of transparency
- select and produce paperwork for internal phototypeset (same package will be given out by instructor)
- letter labelling with photocopy machine
- manufactured lettering products
- prepare camera-ready material for a slide
- prepare camera ready material for offset negative (to be reproduced by Printing Department - to practical assignment - e.g. use Social Letter Project to make a package which may be distributed for future reference)

Given a tour of the A-V Department of Sault College, the student will produce a log describing the specific equipment and general use, etc., as well as the human services available.

LEARNING ACTIVITIES AND APPLICATIONS:

LECTURES, DEMOS AND HANDOUTS

PRACTICAL ASSIGNMENTS

- ALL TO BE GIVEN OUT BY INSTRUCTOR

SPEAKER (if available)

TOUR - college A-V facilities

EVALUATION:

1. Class Assignments
2. Log

ESTIMATE TIME TO ACHIEVE:

(4) 50-minute periods

OBJECTIVE 15:

Pg. 20  
OPE400

Unit - Supervisory Techniques

- 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

LECTURE, DEMOS AND HANDOUTS

CLASS DISCUSSION

GUEST SPEAKER (if available) - personnel manager

EVALUATION:

I. Personal Personnel File

ESTIMATED TIMES

TO ACHIEVE:

4 periods of 50-minutes each'

\*does not include student reading and assignment time

Unit - Dictation and Transcription

- 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 ACTIVITIES AND APPLICATION

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENT

- TO BE GIVEN OUT BY INSTRUCTOR

CLASS DISCUSSION

EVALUATION:

1. Assignment - Dictation
- 2> Assignment - Transcription and Presentation

ESTIMATED TIMES

TO ACHIEVE:

Out-of-Class	as required
Discussion In-Class	1 50-min. period
Transcription	2 50-min. periods



OBJECTIVE 9:

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OPE400

Unit - In-Baskets (advanced difficulty including Decision-Making)

-Given an in-class test containing practical work of a similar nature to that found in the in-baskets or the decision-making sessions, the student will demonstrate the ability to employ higher levels of cognitive abilities — the processes of analysis and decision-making - and to complete accurate finished work or provide answers (as applicable). Cognitive abilities include:

- \* an understanding of assigned task
- \* using previously learned competencies in new situations
- \* gathering facts from various sources and determining course of action
- \* judging which data or action is appropriate for a given situation

LEARNING ACTIVITIES AND APPLICATIONS:

Instructor review and ongoing assistance as in-baskets are completed. Then, feedback after in-baskets have been turned in.

Completion of In-BASKETS 1-7 INCLUSIVE OF EXECUTIVE SECRETARIAL OFFICE PROCEDURES

•Students are recommended to complete the major portion of in-baskets in class so instructor can observe work and make last-minute changes (as is normal in the work environment - onus is on student to be aware of any changes). Also, remember that quality of finished product will be judged. If material is completed on poor equipment, it will be judged that the student assumes this to be business quality and marks will be deducted accordingly.

EVALUATION:

In-basket work - see BINDER - General Statements, Pg. 1 (Note - no portion of binder can be done on word processor since not all students have access to this equipment and also because of duplication capabilities. If any work is found to be done using this process, it will be disqualified.

Tests on In-Baskets 2-7 (practical work similar to in-basket setup)  
Tests 1-3 - on Decision-Making

ESTIMATED TIME TO ACHIEVE: (In-Baskets) 20 In-class periods plus whatever out-of-class time is required  
(Decision-Making) 12 test periods  
(Decision-Making) 6 in-class periods including (2) for tasting

