

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY

SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

Course Title: OFFICE MANAGEMENT
Code No.: BUS 224-3
Program: NATIVE SOCIAL SERVICES AIDE
Semester: III
Date: 1988 09 01
Author: Elsie Lalonde

New: X Revision:

APPROVED:

Elsie Lalonde
Chairperson -

SS-08-24
Date

COURSE PREREQUISITE(S) - None.

EDUCATIONAL GOAL

The educational goal of this course is to provide the Native Social Services Aide student with the knowledge and basic skills to handle administrative duties related to their employment with an agency, etc.

INSTRUCTIONAL GOALS

This course is designed to provide the Native Social Services Aide with:

- a basic knowledge of office "management" skills both of a personal and interactive nature aimed at responding to the administrative duties of an agency or like work situation
- a basic knowledge of the steps required to organize a meeting, be an active participant (either informal or formal meeting structure), record minutes or act as the chair.

LEARNING OBJECTIVES

(see individual objectives which follows)

OUTLINE OF COURSE STRUCTURE

The course will be comprised of three distinct components: basic records management (filing), basic administrative office procedures, and indepth coverage of the role in meetings of the member, committee member, officers, and the chair. All three of these components will be run simultaneously with one period per week devoted to each segment. This procedure should allow for a balanced workload and, more importantly, simulate the actual work-world setting which is most often subject to constant interruption of task which necessitates the use of time management skills.

GUIDELINES RE GRADING

1. If a student is not able to write a test because of illness, or a legitimate emergency, that student must contact the instructor prior to the test and provide an explanation which is acceptable to the instructor (medical certificates or other appropriate proof may be required). In cases where the student has contacted the instructor, and where the reason is not classified as an emergency, i.e. slept in, forgot, etc., the highest achievable grade is a "C." In cases where the student has not contacted the instructor, the student will receive a mark of "0" on that test. THERE WILL BE NO REWRITES OF TESTS OR QUIZZES. If any final tests are not written, student grade will be subject to a 10% penalty on total grade attained at that point for each -final test not attempted.

2. DUE DATES - 100% completion of all assignments is expected. Any class assignment/project, etc., 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.

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

3. Field trips, guest speakers and specified visuals or like are arranged to supplement classroom activities. Attendance is mandatory. If a student is not in attendance, then the student will have a choice of either (a) a loss of 10% of the accumulative semester mark (all items except tests), or (b) preparing a paper relating to the field trip or topic under discussion - particulars to be approved by instructor.

EVALUATION

Class participation (including attendance)/discussion.....	5%
Records Management - 8 tests	15%
Class Assignments (6) - Motion.....	2%
Resolution...	3%
Agenda.....	5%
Notice.....	2%
Press Release	2%
Letter.....	2%
Memo.....	2%
Bus. Card File	2%.....
Projects:	
Appointment Diary/To Do List.....	5%
Minutes of Meeting - class meeting..	5%
Minutes of Meeting - outside association	5%
Precedence of Motion Test (open book)	
and meeting vocabulary (closed).....	5%
Test #1 (mid-term).....	20%
Test #2 (final - two-part test - 1 period each).....	20%
TOTAL - 100%	

GRADE/NUMERICAL EQUIVALENCIES:

A+	95 - 100% - consistently outstanding achievement
A	85 - 94% - outstanding achievement
B	70 - 84% - consistently above average achievement
C	60 - 69% - satisfactory or acceptable achievement
R	below 60% - REPEAT - THE STUDENT HAS NOT ACHIEVED THE OBJECTIVE OF THE COURSE AND THE COURSE MUST BE REPEATED

MATERIALS

Progressive Filing Practice Set (ninth edition)

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. The student will then present this to the instructor at the first class of the semester and will be given the required kit. Work on this kit starts immediately so even a slight delay may cause the student to be unprepared for the first test as the test is based on the actual work done by the student with this kit.

The Meeting Will Come to Order

Harold Sponberg, North Central Regional Extension Publication No. 228

Robert's Rules of Order (illustrated edition)

Bantam Books: Toronto, Ont. (1982)

- (3) Lettersize File Folders
- (1) Perpetual Diary
- (1) 3" x 5" File Box (Plastic)
- (1) pkg. 3" x 5" Index Cards
- (3) pkgs. Index Tabs
- (1) set 3-ring dividers
- (1) highlighter (preferrably yellow)
- (1) red lead pencil
- (1) box paperclips

ESTIMATED SCHEDULE - BUS. 224-3 (1988)

1. Schedule subject to change due to:

*availability/unavailability of listed films, videos, etc.

*since this is the first time this course has been offered, and in view of the extensive material which is scheduled to be covered in a three-period program, the instructor may make alterations (in writing) - preferably in consultation with Native Studies Coordinator and students.

*unanticipated delays or deletions caused as a result of any class cancellations by college management or similar situation.

2. All filing homework assignments are normally due one week from date assigned unless otherwise specified by instructor. Practice kit work prior to a test must be completed as this kit serves as the basis for testing.

DATE ACTIVITY

SEPT.	5	Holiday - LABOUR DAY
	7	Distribution and Review of Objectives
	8	Film - Topic - Parliamentary Rules
	12	Film - <u>Filing Procedures in Business</u> Filing Rules for Homework Assignment Jobs 1 - 3
	14	<u>The Meeting Will Come To Order</u> , pp. 1-9
	15	Film - Time Management
	19	Filing Rules for Homework Assignment Jobs 4 - 7
	21	<u>The Meeting Will Come To Order</u> , pp. 10 - 11; 18
	22	Time Management
	26	FILING TEST #1, JOB 8 Filing Rules for Homework Assignment Jobs 9 - 11
	28	Speakers
	29	Meeting Films
OCT.	3	Filing Rules for Homework Assignment Jobs 12 - 15
	5	Memos, Letters, Reprographics, Copyright, etc.
	6	" " (plus a meeting film, if available)
	10	Holiday - THANKSGIVING
	12	Speaker - Filing/Fin. Computer Software (Native Programs)
	13	TEST #1 (MID-TERM)
	17	FILING TEST #2, JOB 16 Filing Rules for Homework Assignment Jobs 17 - 18
	19	<u>The Meeting Will Come To Order</u> , pp. 11-14
	20	Contribution Agreement
	24	Filing Rules for Homework Assignment Jobs 19 - 21
	25	<u>The Meeting Will Come to Order</u> , pp. 14 - 15
	27	Government Forms
	31	FILING TEST #3, JOB 22 Filing Rules for Homework Assignment Jobs 23-26

NATIVE SOCIAL SERVICES AIDE - BUS 224-3 (OFFICE MANAGEMENT)
(SCHEDULE-continued)

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<u>DATE</u>	<u>ACTIVITY</u>
NOV. 2	<u>The Meeting Will Come to Order</u> , pp. 16 - 20
3	References
7	Filing Rules for Homework Assignment Jobs 26-30
9	<u>Robert's Rules of Order</u> , pp. 128-153; 153-164
10	References
14	TEST #4, JOB 31
	Filing Rules for Jobs 32 - 35
16	<u>Robert's Rules of Order</u> , pp. 165-183, 80-94, 112-120, 183-186, 26-35
17	Mail, etc.
21	Filing Rules for Homework Assignment Jobs 36 - 49
23	<u>Robert's Rules of Order</u> , pp. 186-203, 36-79, 103-110
24	Mail, etc.
28	TEST #5, JOB 40
	Filing Rules for Homework Assignment Jobs 41 - 43
30	<u>Robert's Rules of Order</u> , pp. 203-226, 94-103, Press Kit
DEC. 1	Purchase Req., Expense Acct. Report, Petty Cash, Check Req.
5	Filing Rules for Homework Assignment Jobs 44-47
7	Meeting - classroom
8	Telephone
12	TEST #6, JOB 48
	Filing Rules for Homework Assignment Jobs 49-53
14	Meeting - Classroom
15	Telephone
19	TEST #7, JOB 54; FINAL TEST ON FILING - JOB 55
21	FINAL TEST ON MEETINGS
22	FINAL TEST ON ADMINISTRATIVE TOPICS
	LAST DAY OF FIRST SEMESTER AND BEGINNING OF CHRISTMAS BREAK

N.B. ALL FILING CLASSES IN WHICH THERE ARE NO TESTS ADMINISTERED MAY INCLUDE FILMS ON MEETINGS, MINI-CLASS MEETINGS, OR SHORT LECTURES ON OTHER TOPICS. IN OTHER WORDS, ANY REMAINING TIME IN THESE PERIODS HAS A FLEXIBLE SCHEDULE.

OBJECTIVE 1

Given an in-class "finding" quizz, the student will demonstrate the ability to find the requested items from their own prearranged filing kits within one-half hour. The number of questions per test will vary but tests 1-7 will not exceed 25 and the final will have 50. The types of filing will include:

<u>TEST NO</u>	<u>TYPE OF FILING</u>
1-3	Alphabetic Indexing
4	Alphabetic Correspondence
5	Subject Correspondence
6	Numeric Card
7	Geographic
8	Final (comprehensive)

Also, the student will be able to respond to brief essay or multiple-choice questions covering filing materials, equipment, basic agency/band filing methods, as well as electronic filing and retrieval.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE	1. Instructor will introduce the rules and review the homework assignments with the students for the practice kit - <u>Progressive Filing Kit (Ninth Edition)</u> . 2. Instructor will cover filing materials, equipment, retention schedule, classification of records as vital, important, useful, or nonessential, and colour coding.
FILMS	<u>Filing Procedures in Business</u> , Ontario Dept. of Education (13 min., clr.) (Cat. No. 002036)
GUEST LECTURER	First Nations Technical Institute, R.R.#1, Deseronto, ON - Dave Wilson
HANDOUTS	To be provided by instructor.
PRACTICAL WORK	Hands-on filing practice kit. Answers to jobs will be available at the S.C. Library Circulation Desk shortly after the class in which the jobs were taken up.

EVALUATION

1. Hands-on filing applications and short theory questions - 8 quizzes.
2. Theory covering materials, equipment, etc. - Test #1 (mid-term) and Test #2 (final). The latter would be at the instructor's choice. Students would be preadvised.

ESTIMATED TIME TO ACHIEVE:

(14) 50-minute periods

N.B. Time allowance does not include out-of-class homework or assignments. This applies to this and all subsequent objectives.

OBJECTIVE 2

ADMINISTRATIVE SKILLS

Given a combination of in/out-of-class assignments/projects as well as short essay, multiple choice, and/or matching questions on tests, the student will show ability to satisfactorily handle the specific areas highlighted below at a job-entry level (cummulative average min. 60%).

TIME MANAGEMENT

- explain time management concepts and techniques
- identify low-payoff items and suggest methods to avoid them
- identify high-payoff items and discuss their importance
- identify typical time wasters and how to remove them from your routine
- explain what is meant by the term work simplification
- list and discuss a minimum of ten techniques which will provide for the more efficient use of time

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor lecture and demonstrations.
FILMS Finding Time, 16mm, 28 min. col. - Mtry. C&R
The Time of Your Life, 16mm., 28 min., col. film -
Ministries of C&R (#16497) and also Education.
Video Tape - Sault College A-V - N.B. Also entitled: How to Control Your Time and Your Life
It's About Time, TV Ontario - Video Tape - S.C. A-V (expires Apr. '90)
A Team of Two (Rev.), col., (need special VHS), 30 min. - Mtry. of Ed.
A Perfectly Normal Day, 28 min., col. - Mtry. of Ed.
RESERVE RDG. How to Control Your Time and Your Life - CIRCULATION S.C. Library
DEMO Tickler Files; Time Study - local native band office.
APPLICATION Perpetual Diary maintenance
1-wk. maintenance of TO-DO list
HANDOUTS "Procrastination," etc. - by instructor

MATERIALS

Perpetual Diary
To-Do List - instructor to provide

EVALUATION

Questions on Test #1
Projects - Appointment Diary & To-Do List = 5% of final grade

TIME TO ACHIEVE

(2) 50-minute periods

Objective 2 - continued.

CORRESPONDENCE

Given (2) out-of-class assignments as well as application or essay type questions on a test, the student will demonstrate a basic knowledge of:

- letter format
- envelope formats
- memo formats
- methods of copying
- methods of communicating materials
- methods of correction (manual and electronic)
- methods of proofreading and proofreading symbols
- equipment - alternate languages (including native), type styles, filing
- methods of requesting word processing
- methods of reproduction and copy control
- copyright
- dictation techniques

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor lecture and demonstration.
HANDOUTS Provided by instructor - e.g. Dictation Checklist, copyright regulations, proofreading reference chart, word processing requests, reprographic request forms, typestyle chart, letter style and memo sample packages.
FILMS Put it in Writing, TV Ontario, col., S.C. A-V (expires Apr. '90)
DEMOS Word Processor (if students feel necessary).

EVALUATION

Application and essay questions (closed and open book) - Test #1

ESTIMATED TIME TO ACHIEVE

(1-2) 50-minute periods

ADMINISTRATIVE FORMS

Given short essay type and/or application questions (open-book), the students will determine the correct form, apply the information, and indicate source of form.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor and, if possible, guest speaker(s).
HANDOUTS Provided by instructor*.

*(GOVERNMENT FORMS, CONTRIBUTION AGREEMENT)

EVALUATION

Test #2.

TIME TO ACHIEVE

(2) 50-minute periods

REFERENCE MATERIALS

Given short response type or essay questions, the student will demonstrate ability to analyze a situation, select a suitable source of reference, and locate information.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor
SLIDES Community Information Centres in Ontario - Mtry. Culture & Rec.
DEMOS Postal Code Directory
City Directory
Telephone Directory (government, kwick-find)
Community Information Directory
Telex Directory
Fax Directory
Business Card Directory
OTHER - (TO BE ESTABLISHED AT A LATER DATE)
APPLICATION Personal Card Box Directory

EVALUATION

1. Test #2
2. Business Card Directory = 2% of final grade

ESTIMATED TIME TO ACHIEVE

(2) 50-minute periods

MAIL, ETC.

Given a combination of open-book and close-book short essay, matching, or fill-in questions of either a theory and application nature, the student will attain a min. of 60% on questions relating to:

- the processing of incoming mail (annotation, dating, logging, release, etc.)
- the processing of outgoing mail including:
 1. by hand
 2. classes of domestic mail and special features
 3. courier service
 4. electronic mail - word processing, fax, telegrams, computers, telex

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor
FILMS, etc. Processing Incoming and Outgoing Mail, film-strip & cassette, col.,
 - Sec. Ctre.
SPEAKERS Courier Service, Canada Post Rep. (if available)
DEMOS Fax - Purchasing Dept., S.C. (if possible)
HANDOUTS Courier Rate Sheet, Canada Post Rate Sheets

EVALUATION

Test #2

ESTIMATED TIME TO ACHIEVE

(3) 50-minute periods

GENERAL OFFICE FORMS

Given application questions, the student will demonstrate ability to handle the following general office forms at a satisfactory job-entry level:

- purchase requisition
- travel expense request form
- travel expense report
- cheque requisition
- petty cash voucher

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor
HANDS-ON In-class hands-on practice

EVALUATION

Test #2.

ESTIMATED TIME TO ACHIEVE

(1) 50-minute class period

TELEPHONE

Given short essay and application questions on recording messages, logging calls, telephone courtesies, the student will demonstrate knowledge and application of same at a job-entry level.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor
FILMS, ETC. How to Lose Your Best Customer, 16mm, 28 min. col. -
 Sec. Ctre. or Mtry. of C&R.
 Talk Business, TV Ontario - S.C. A-V (expires Apr.'90)
SLIDES Telephone Techniques - Sec. Ctre
HANDOUTS Message Pads, Message Record Books, Logging Sheets

EVALUATION

Test #2.

ESTIMATED TIME TO ACHIEVE

(2) 50-minute periods

OBJECTIVE 3 - MEETINGS

Given the following in/out-of-class assignments/projects, the student will perform the following tasks at a min. job-entry level (e.g. 60%):

- preparation of and response to a meeting notice
- preparation of a written motion
- preparation of a written resolution
- preparation of minutes a class meeting
- preparation of minutes of an in-school or outside organization meeting

and, given an open book test of precedence of motions; a closed-book short reponse or matching test; and, a series of theory questions (some open- and some closed-book) on the procedure of business meetings, committees, officers, and the purpose of a constitution, bylaws, standing rules, etc., plus the vocabulary used during parliamentary meetings etc., the student will attain a min. 60% level.

also, the student will actively participate in mock classroom meetings.

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE Instructor and demo
PARTICI- Mock Meetings AND attendance at 1 - 2 out-of-class meetings
PATION
FILMS Parliamentary Procedures:

Parliamentary Procedures, Mtry. of Ed. (000575), 22-min. b&w 16mm
Meetings, Bloody Meetings, 16mm, 30 min., col. - Ministries of
C&R or Education (014079), or Indian Affairs.
Meeting in Progress, 16mm, 43 min., col. - Mtry. Culture & Rec.
Meeting in Session, 16mm, 20 min., b&w - Mtry. of Culture & Rec.
Parliamentary Procedures, 16mm, 10 min, b&w -Mtry. of Culture
Parliamentary Procedure in Action, 16mm, 16 min., col. - Mtry ".
Speech - Conducting a Meeting, 16mm, 10 min., b&w - Mtry. "

Other meetings, etc.:

All I Need is a Conference, 16mm, 28 min., b&w - Mtry. C&R
How to Conduct a Discussion, 16mm, 24 min, b&w - "
Hemi Series () video, () min. ea. col. - S.C. A-V

Listening Skills:

Listening - The Problem Solver. 1981. 20 min. 16mm. col. -
Sault Ste. Marie Public Library
Roadblocks to Communication, 16mm, 30 min., b&w - Mtry. C & R
What Do You Mean, What Do I Mean? Case Studies in Communication,
16mm, 18 min., col. - Mtry. C&R

Objective 3 - continued.

Communication:

Communication-Non Verbal Agenda, 16mm, 30 min. col. - Mtry. C&R
More Than Words, 16mm, 14 min., col. - Mtry. C & R
Perception, 16mm. film, 27 min., col. - Mtry. C & R
A Birdseye View of Cree and Ojibwe Language - Part 1 - 60 min.;
 Part 2 - 20 min. - 1/2" reel-to-reel video, b&w
How to Read A Foreigner - Part 1 - 3/4" video cassette, 45 min.,
 col.; Part 2 - 30 min., col. (also both parts available in 1/2"
 reel-to-reel video, b&w) - Mtry. of C&R
More Than Words, 16mm, 14-min., col. - Mtry. C&R

Speech:

Speech - Function of Gestures, 16mm, 20 min., b&w, Mtry. C&R
Speech - Planning Your Talk, 16mm, 10 min., b&w - Mtry. "
Speech - Platform Posture, 16mm, 11 min., b&w - Mtry. "
Speech - Stage Fright, 16mm, 11 min., b&w - Mtry. "
Speech - Using Your Voice, 16mm., 10 min., b&w - Mtry. "

Groups:

The Anatomy of a Group, 16mm, 30 min., b&w - Mtry. C&R
Diagnosing Group Operations, 16mm., 30 min., b&w - Mtry. C&R
Group Dynamics: "Groupthink", 16mm, 22 min., col. - Mtry. C&R

Leadership:

Developing Leadership, 16mm, 10 min., b&w - Mtry. C&R
Sharing Leadership, 16mm, 30 min., b&w - Mtry. "
Situational Leadership, 30 min., b&w - Mtry. "

ASSIGNED The Meeting Will Come To Order (see schedule pp. 4-5 for
 READING Robert's Rules of Order page coverage and dates)

EVALUATION

1. Test #2.
2. Class Assignments:
 - Motion..... 2% of final grade
 - Resolution..... 3% of final grade
 - Agenda..... 5% of final grade
 - Notice..... 2% of final grade
3. Projects:
 - Minutes of in-class meeting..... 5% of final grade
 - Minutes of outside association meeting..... 5% of final grade

ESTIMATED TIME TO ACHIEVE (15) 50-min. periods plus whatever time can
 be used from the balance of lecture time in the (14) filing period slots.

N.B. not all videos listed in the previous objectives will be used. Choice will
 be dictated by quality, availability of film, etc., and class viewing time.