



**EXECUTIVE OFFICE PROCEDURES - OPE300**

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**COURSE PREREQUISITES**

Prerequisite for OPE300 - OPE200

**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, follow-through, 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"**

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The following grading procedure will be followed for OPE300:

TESTS

Meeting - Hemi	5%
Meeting - Text (3x5%)	15%
Filing (av. Tests)	10%
Travel	10%
Taxation	10%
Ansley Simulations (1x5%, 1x10%)	15%
Sub-total	65%
ROUGH DRAFT	10%
CLASS PARTICIPATION AND ASSIGNMENTS GENERAL	10%
ANSLEY IN-CLASS	10%
TIMED WRITINGS	5%
TOTAL MARK	100%

**GDIDELINES RE GRADING**

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,**

Individual segments of the Class Participation and Assignment final grade are calculated according to the evaluation procedures listed in the individual objectives for OPE300.

Marking Deductions:

- 5 points for each proofreading, spelling or major format error
- 2 points each for all other types of errors (poor corrections, alignment problems, word division, minor format errors)
- 1/2 to 5 points for each punctuation error

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4, Due Dates - 100% completion of all assignments is expected. Any class assignment submitted 1-5 days after due date\* will be subject to a loss of 10% of the mark given the assignment. No mark will be assigned after the 5th consecutive day the assignment is late\*

"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 date to be a legitimate basis for postponement.

5, Field trips and guest speakers 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 (daily work) or (b) preparing a paper relating to the field trip or topic under discussion - particulars to be approved by instructor,

**GRADE/NUMERICAL EQUIVALENCIES;**

A+	95% - 100%	CONSISTENTLY OUTSTANDING
A	85% - 94%	OUTSTANDING ACHIEVEMENT
B	70% - 84%	CONSISTENTLY ABOVE AVERAGE ACHIEVEMENT
C	60% - 69%	SATISFACTORY OR ACCEPTABLE ACHIEVEMENT
R	BELOW 60%	SATISFACTORY OR ACCEPTABLE ACHIEVEMENT
		REPEAT - OBJECTIVES OF THE COURSE HAVE NOT BEEN ACHIEVED AND THE COURSE MUST BE REPEATED

**MID-TERM REPORTING**

- S - Satisfactory Progress
  - U - Unsatisfactory Progress
  - R - Repeat (objectives have not been met)
  - NR - Grade not reported to Registrar's Office. This grade issued to facilitate transcript production when faculty, because of extenuating circumstances, find it impossible to report grades by due dates.
- COURSE OUTLINE SUBJECT TO CHANGE DEPENDING ON UNFORESEEN CIRCUMSTANCES.

**TEXTBOOK(S):**

**Semester III**

Progressive Filing Practice Set (9th ed\*)  
Stewart, Scharle, Kahn, 1980 - McGraw-Hill

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 class of the semester and will be given the kit. The first test on this material will be scheduled 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 Meeting Will Come to Order  
Central Michigan University

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

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

Organizing Business Meetings - Joyce Berezowsky, 1983, Falken Publishing

**REFERENCE TEXTS ONLY** (NOT REQUIRED TO PURCHASE)

O Contemporary Office Procedures

Attridge & Cunnington, 1983, McGraw-Hill (1987-8 OPC100-200 text)

**MATERIALS** (COMMON TO SEMESTERS III & IV)

- carbon paper
- typing paper (not corrasable bond)
- newsprint (for file copies)
- onionskin (for distribution copies)
- erasing material (duplex eraser, liquid paper, etc.)  
and non-adhesive "Lift Off" tape for typewriter
- manilla file folders (8 1/2" x 11" letterhead size only)  
(minimum 6)  
(assignments will only be accepted with a file folder properly  
labelled)
- file labels
- perpetual diary
- Gregg Reference Manual
- 2 double-sided, double density diskettes
- V7ork Perfect Reference Manual
- Webster's New World Dictionary, 3rd College Ed. or equivalent

**OBJECTIVE 1:****ATTENDANCE**

The student will demonstrate the ability to attend functions during Semester III (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. If pre-notice, instructor will indicate acceptance or non-acceptance of cause for absenteeism. 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 - 759-6774, ext. 487; residence 779-2925), message left with Secretarial Centre, main switchboard operator, or switchboard message recording device (1-min. message may be left between 5:15 p.m. - 8:15 a.m.). This will ensure that student can establish contact 24-hours a day regardless of whether a student is in or out of the city.

**APPLICATIONS**

- Group I:     - tours/field trips/seminars as arranged by instructor  
              - guest speakers, presentations, etc.  
              - films, videos, slide presentations, (in or out of class)
- Group II:    - tests

**EVALUATION**

Attendance will be monitored through the use of absenteeism reports in instructor record book.

- Group I:     - any absence without authorization or just cause will result in the loss of 10% of the **total** semester cumulative mark for class participation and assignments.
- 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.

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**OBJECTIVE 2:**

**ROUGH DRAFTS TO MAILABLE COPY (SPEED BUILDING)**

Semester III - Given in-class testing on unfamiliar material of 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 specified quantity of work in a specified time
- use thinking skills to produce acceptable office-standard material

**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. 10 points). There is no opportunity to make up missed rough draft classes. However, to accommodate illness, etc., one rough draft mark will be dropped from the total semester mark. The final grade obtained, will be used to reflect 10% of the grade of the OPE course in both semesters.

**DEDUCTION SYSTEM**

0 - if proofreading error found in copy (includes spelling errors)  
Less 5 points - major format error or proofreading instruction error  
Less 2 points - minor format error, unacceptable erasure or smudge  
Less 1/2 - 5 for punctuation error  
Less appropriate deduction for incomplete copy

**ESTIMATED TIME TO ACHIEVE:**

Approximately (1) 50-minute period per week (Semesters III-IV)  
12 - 15 periods in total.



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**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. 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:

TIMINGS ACHIEVED IN SEMESTER III ARE NOT TRANSFERABLE TO SEMESTER IV.

2. THOSE STUDENTS REQUIRING REMEDIAL TRAINING will be assigned speed and accuracy drills/drill 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 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 Secretarial Centre technician along with instructor recommendation,

**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%.

**ESTIMATED TIME TO ACHIEVE**

12-15 periods of 20 minutes each

Note: these timings are given in 20 minute-sessions during the 50 minute rough draft period.

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**

**UNIT 1 - 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 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 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 as part of a group, the student will prepare a typewritten report, with supporting information, describing a particular aspect of executive travel, i.e., traveller's cheques, ground transportation, car rentals, airline travel, health insurance, hotel accommodations, etc.

**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. Individual Assignment - pre, interim and post travel paperwork
4. Group Assignment - report on one aspect of executive travel

**ESTIMATED TIME TO ACHIEVE**

7 periods of 50-minutes each\*

1 50-minute test period

"does not include student reading and assignment time

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**OBJECTIVE 5**

**UNIT 2 - OFFICE FINANCE**

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 federal income tax, pension, and U.I.C. tables and compute appropriate deductions
- prepare and/or file all paperwork for submission of tax, pension and U.I.C.

**LEARNING ACTIVITIES AND APPLICATION**

READ: pgs. 542-551  
Contemporary Office Procedures

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENTS - as given out by instructor

GUEST SPEAKER (if available) -, REVENUE CANADA, TAXATION CENTRE,  
SUDBURY OFFICE

**EVALUATION**

1. Test
- 2, Assignment on Payroll Deductions

**ESTIMATED TIME TO ACHIEVE**

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

"does not include student reading and assignment time

OBJECTIVE 6

UNIT 3 " 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 have 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. A minimum number of In-Basket assignments must be completed using Word Perfect word processing software on IBM PC compatible equipment.

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 10% towards final mark.

ESTIMATED TIME TO ACHIEVE

12 in-class periods plus 15 out-of-class periods maximum  
1 50-minute test period\*  
1 100-minute test period\*

"Testing will be done on the typewriters located in A205.

OBJECTIVE 7

UNIT 4 - MEETINGS AND CONFERENCES

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:

- describe the term "meeting dynamics" as it relates to task and process activities, describe the term "groupthink", and explain the use of hidden agendas
- describe considerations involved with pre-meeting planning, i.e., scheduling the meeting, notifying participants, the use of proxies, agenda preparation, and preparation and distribution of meeting materials
- describe considerations as they relate to conference and meeting set-ups - cost, location, environment, and physical set-up
- outline items to consider when planning special types of meetings, i.e., booking accommodations for out-of-town meetings, arranging hospitality suites, contacting guest speakers, arranging panel discussions and organizing symposiums and tours
- describe meeting management principles for leaders
- outline key components of a final set of minutes and describe aids used in minute preparation
- describe the principles of formal "rules of order" and classify motions according to purpose and precedence
- describe the difference between a "petition", "recommendation" and "resolution"
- identify the various types of meetings commonly held and explain the difference between a "standing" committee and an "ad hoc" committee
- describe the three forms of electronic conferencing

LEARNING ACTIVITIES AND APPLICATIONS

READ: Organizing Business Meetings  
The Meeting Will Come To Order

VIEW: HEMI - MEETING Video

LECTURE, DEMOS AND HANDOUTS

PRACTICE ASSIGNMENTS

As given out by instructor

CLASS DISCUSSION

GUESTSPEAKER (if available) - log required

**EVALUATION**

Tests (4)

Log - Guest Speaker (if available)

Assignment - prepare a resolution (instructor will provide paper additional copies must be purchased by student from office supply store)

Assignment - research a related meeting topic then prepare a motion form

motion and - prepare an agenda and notice of meeting

Assignment - record and prepare minutes for in-class meeting

Assignment

**ESTIMATED TIME TO ACHIEVE**

16 periods of 50-minutes each\*

4 periods for testing

•\* does not include student reading and assignment time

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**OBJECTIVE 8****UNIT 5 - FILING**

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

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

**LEARNING ACTIVITIES**

Progressive Filing Practice Set (ninth edition)  
Stewart, Scharle, Kahn, 1980, McGraw-Hill

**METHOD OF PRESENTATION**

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

**TESTING METHODS**

Two types of testing will be used:

- (a) Finding Quizzes - student to locate material from own unchecked files within a specified time limit
- (b) Theory Application - student will be provided with examples of items to be filed and will be required to sort into proper filing order - or will respond to questions on filing terminology.
- (c) Number of questions and estimated testing time:

TEST	COVERAGE AREA	FINDING	APPLYING	TIME
1	ALPHABETIC INDEXING	15	25	1/2 HR,
2	ALPHABETIC INDEXING	15	25	1/2 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	30(15&15)	35	1/2 HR.
7	GEOGRAPHIC	15	15	15 MIN.
8	FINAL		50	35 MIN.

**ESTIMATED TIME TO ACHIEVE**

14 periods of 50 minutes each (including testing)

