

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY

SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

COURSE: OFFICE MANAGEMENT

CODE NO.: BUS224-3

PROGRAM: NATIVE COMMUNITY WORKER

SEMESTER: IV

DATE: 1991 01 01

AUTHOR: ELSIE LALONDE

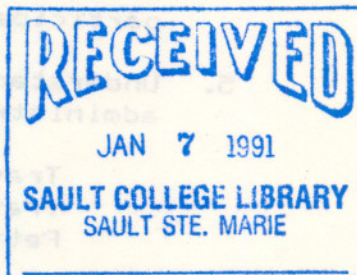
PREVIOUS OUTLINE

DATE: 1988 09 01

NEW: \_\_\_\_\_ REVISION: X

APPROVED: [Signature]  
Chairperson

91-01-07  
Date



TOTAL CREDIT HOURS = 45

PREREQUISITE(S) = None

**I. PHILOSOPHY/GOALS:**

EDUCATIONAL - to provide the NATIVE COMMUNITY WORKER student with the knowledge and basic skills to handle administrative duties related to their employment with a agency, etc.

INSTRUCTIONAL -

to provide 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

to provide basic knowledge of the steps required to organize a meeting, be an active participant (either informal or formal meeting structure), records minutes or act as the chair.

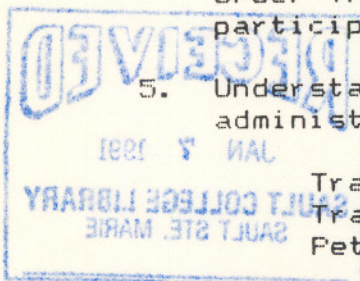
**II. STUDENT PERFORMANCE OBJECTIVES**

Upon successful completion of this course the student will:

1. Understanding the value and use of time management techniques as well as be able to apply same to diaries, calendars, reporting forms, etc.
2. Understanding the value and appropriate application of basic records management techniques including record retention, record retrieval, filing supplies, filing rules in the areas of alphabetic, subject, numerical, geographical filing.
3. Understand the value and the application of the various meeting paperflow (notices, minutes of meeting, motions/resolutions, agenda, press release, etc.).
4. Understand the value and application of Robert's Rules of Order from the viewpoint of member and/or executive participation at committee or general meeting level.
5. Understand the value and the application of such administrative paperwork as:

Travel Expense Request Forms  
Travel Expense Reports  
Petty Cash

Travel Advance Forms  
Government Forms  
Purchase Requisitions  
Cheque Requisitions



6. Understand the value and application of mail handling procedures for incoming mail as well as outgoing mail.
7. Understand the value and application of correspondence procedures (formats, correction, distribution copies, copyright, proofreading, alternate languages, word processing, reproduction, and dictation).
8. Understand the value and application of reference materials.
9. Understand the value and application of good telephone techniques and recording and logging procedures.

### III. TOPICS COVERED

1. Filing
2. Time Management
3. Correspondence
4. Reference Materials
5. Mailing Procedures - Incoming and Outgoing
6. General Office Forms
7. Telephone
8. Meetings - administrative paperwork and parliamentary procedure rules of order.

### IV. LEARNING ACTIVITIES AND RESOURCES

See attached pages 8 to 15

### V. EVALUATION METHODS

#### 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 is issued to facilitate the production of a student transcript when faculty, because of extenuating circumstances, find it impossible to report grades by due dates.

#### FINAL GRADE REPORTING

- A+ 90% - 100% - CONSISTENTLY "OUTSTANDING"  
 A 80% - 89% - "OUTSTANDING" ACHIEVEMENT  
 B 70% - 79% - CONSISTENTLY "ABOVE AVERAGE"  
 C 60% - 69% - SATISFACTORY OR ACCEPTABLE ACHIEVEMENT  
 R BELOW 60% - REPEAT - objectives of the course have not been achieved and the course must be repeated.

BUS224-3 Evaluation

Assignment		Test				Topic(s)
#	%	Filing	%	Theory	%	
1	4					Time Management
		1	1	1	15	Filing (Rules 1-5)
						Tel., Travel, P.O., Budget, Petty Cash
		2	1			Filing (Rules 1-10)
2	1					Notice of Meeting
3	2					Agenda
4	2					Resolution
						Motion
5	3					Meeting - City Council
6	2					" - Academic Council
MID-TERM		/33 =		/100%		
		3	1			Filing (Rules 1-12)
		4	1			Filing (pps. 27-37, Jobs 17-19)
		5	1			Filing, pps. 39-44 Jobs 20-22)
				2	15	Meeting Terms
		6	1			Filing (pps. 44-47) Ex. 23-24)
				3	10	Minutes of Meeting
		7	1			Filing (pps. 47-49) Ex. 25--26)
7	10					Reference
8	3					Correspondence - Letter
9	2					Correspondence - Memo
10	5					Press Release
11	1					Proofing
12	5					Dictation
		8	8			Filing (all rules)
				4	4	Diary, Mail, etc.
TOTAL	41	15		44		= 100%

PERCENTAGE OF GRADE ASSIGNMENTS - 41%  
 PERCENTAGE OF GRADE TESTS - 59%

FINAL GRADE REPORTING  
 A+ - 100% - OUTSTANDING  
 A - 90% - CONSISTENTLY ABOVE AVERAGE  
 B - 80% - SATISFACTORY OR ACCEPTABLE ACHIEVEMENT  
 C - 70% - REPEAT - objectives of the course have not been achieved and the course must be repeated.  
 D - 60%  
 F - 50%  
 I - 40%  
 R - 30%  
 W - 20%  
 X - 10%  
 Y - 0%

## 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 ON TESTS/QUIZZES. If any final tests in any section (filing, etc.) are not written, the student's grade will be subject to a 10% flat penalty on the total grade for that section which was attained at the point the final test was 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 (not the mark achieved by the student). No mark will be assigned after the 7th consecutive day the assignment is late. Note - consecutive days include weekends.  
  
\*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 due date to be a legitimate basis for postponement.
3. Field trips, guest speakers and specified visuals or like are arrange 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 expect tests), or (b) preparing a paper relating to the field trip or topic under discussion - particulars to be approved by instructor.

**VI. REQUIRED STUDENT RESOURCES**Textbooks/Materials

Gregg Quick Filing Practice, 3rd Ed., Jeffrey R. Stewart, Jr., Ed. D., Gregg - McGraw Hill, Inc.: Toronto, Ont. (1989).

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 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 (preferably yellow)
- (1) red lead pencil
- (1) box paperclips

**VII. ADDITIONAL RESOURCE MATERIALS AVAILABLE IN COLLEGE LIBRARY**

Reserve Items - reserved in name of instructor

Filing Exercise Answer Key for Gregg Quick Filing Practice

How to Control Your Time and Your Life

Canada Postal Directory

U.S.A. Postal Directory

Government of Ontario Telephone Directory (1988)

Community Information Directory (1988-89)

Telex Directory

Fax Directory

Native Community Branch Directory

KWIC Index to Services, 1988 (Gov. of Ontario)

Others - to be advised

**VIII. SPECIAL NOTES - none**

MON. (SGLE.) - 1:30-2:30 P.M.

THURS. (DBLE) 11:30-1:30 P.M.

## JANUARY

Jan. 10 Objective Review  
 Jan. 14 Film, File Box Set-up, Filing Ex. 1,2,3,4,5  
 Jan. 17 Time Management  
 Jan. 21 Telephone  
 Filing Ex. 6 and Review  
 Jan. 24 Telephone  
 Jan. 28 **QUIZ #1 (RULES 1-5)**, Filing Ex. 7,8,9,10,11  
 Meeting W.C.O. pp. 1-9  
 Jan. 31 Cheque Requisition, Travel Advance, Travel Expense  
 Form, Petty Cash Voucher, Purchase Requisition

## FEBRUARY

Feb. 4 Meeting W.C.P. pp. 10-15  
 Filing, - Ex. 12, Cross Ref. 13, Review  
 Feb. 7 **TEST #1**  
 Feb. 11 **QUIZ #2 (RULES 1-10)**  
 Meeting W.C.O. pp. 16-20  
 Feb. 14 Meetings - Motion, Resolution  
 (Robert's 182-83; 153-164)  
 Feb. 18 Filing - Ex. 14,15,16, Review  
 Feb. 21 Meetings - Notice, Agenda  
 (Robert's 165-183, 80-94, 112-210)  
 Feb. 25 Winter Break  
 Feb. 28 Winter Break

## MARCH

Mar. 4 **QUIZ #3 (RULES 1-12)**  
 Filing Corr. Lect., Ex. 17-19  
 Mar. 7 Meetings - Minutes (Robert's - 186-203, 36-79, 103-110)  
 Mar. 11 **QUIZ #4 - (RULES ALPHA CORR.)**  
 Lec./Setup/Ex. 20,21,22  
 (Robert's - 203-226, 94-103) - **MOCK MEETING**  
 Mar. 14 **QUIZ #5 (SUBJECT)**  
 Mar. 21 **TEST #2**  
 Mar. 25 **QUIZ #6 (NUMERIC)**  
 Geo. Setup, Ex. 25-26, Rv.  
 Mar. 28 **TEST ON MINUTE-TAKING**

APRIL

- Apr. 1 QUIZ #7 (GEOGRAPHIC)  
FINAL OVERALL QUIZ
- Apr. 4 Dictation
- Apr. 8 Reference
- Apr. 11 Memo, Letter, Proofreading
- Apr. 15 Copyright, Alternate Language Print, Reprographics
- Apr. 18 Mail - Postage, etc.
- Apr. 22 Mail - Fax, etc.
- Apr. 25 TEST #3 - including test on  
Time Management (DIARY TEST)

FEBRUARY

- Feb. 1 Meeting W.C.P. pp. 18-19
- Feb. 2 Filing - Ex. 13, Cross Ref. 13, Review
- Feb. 3 TEST #1
- Feb. 11 QUIZ #2 (RULES 1-10)
- Feb. 12 Meeting W.C.O. pp. 18-20
- Feb. 14 Meetings - Motion, Resolution
- Feb. 15 (Robert's 182-83; 183-184)
- Feb. 18 Filing - Ex. 14, 15, 16, Review
- Feb. 21 Meetings - Notice, Agenda
- Feb. 22 (Robert's 185-187, 88-94, 112-210)
- Feb. 25 Winter Break
- Feb. 28 Winter Break

MARCH

- Mar. 4 QUIZ #3 (RULES 1-12)
- Mar. 7 Filing Corr. Lect., Ex. 17-19
- Mar. 7 Meetings - Minutes (Robert's 186-201, 202-209, 193-198)
- Mar. 11 QUIZ #4 - (RULES ALPHA CORE)
- Mar. 11 Lec. Setup/Ex. 20, 21, 22
- Mar. 14 (Robert's 203-205, 24-183) - MOCK MEETING
- Mar. 18 QUIZ #5 (SUBJECT)
- Mar. 21 TEST #2
- Mar. 22 QUIZ #6 (NUMERIC)
- Mar. 25 Geo. Setup, Ex. 23-26, Rv.
- Mar. 28 TEST ON MINUTE-TAKING



OBJECTIVE - FILING

Given an in-class test, the student will demonstrate the ability to apply filing rules. The number of questions per test will vary but tests 1-7 will not exceed 25 and the final will have approximately 50. Rules of filing include:

<u>TEST NO.</u>	<u>TYPE OF FILING</u>
1-3	Alphabetic Card - Individual, Business, Government
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 - Gregg Quick Filing Practice.
  2. Instructor will cover filing materials, equipment, retention schedule, classification of records as vital, important, useful, or nonessential, and colour coding.

FILMS Filing Procedures in Business, Ontario Dept. of Education (13 min., clr.) (Cat. No. 002036)

GUEST LECTURER First Nations Technical Institute, R. R. #1, Deseronto, ON - Dave Wilson (if available).

HANDOUTS To be provided by instructor; filing answer key.

PRACTICAL Hands-on filing practice kit.

EVALUATION:

1. Short theory questions - 7 quizzes.
2. Comprehensive Test - Quiz #8.

ESTIMATED TIME TO ACHIEVE: (15) 50-minute periods

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

OBJECTIVE - 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.

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. 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 - Sault College 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.

LIBRARY Reserve Reading - Circulation Desk - under name Elsie Lalonde - How to Control Your Time and Your Life

DEMO Tickler Files: Time Study - local native band office.

APPLICA- Perpetual Diary Maintenance  
TION 1-wk. maintenance of TO-DO list

HANDOUTS "Procrastination," etc. - by instructor

MATERIALS Perpetual Diary; To-Do List - instructor provided

EVALUATION

1. Questions on Test #4 (To-Do and Appointment Diary).

TIME TO ACHIEVE: (2) 50-minute periods

OBJECTIVE - ADMINISTRATIVE SKILLS - continued

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. Secretarial Centre or Mtry. of C&R.  
Talk Business, TV Ontario - Sault College A-V (expires Apr. '90)

SLIDES Telephone Techniques - Secretarial Centre

HANDOUTS Message Pads, Message Record Books, Logging Sheets

EVALUATION

Test #1

ESTIMATED TIME TO ACHIEVE

(2-3) 50-minute periods

OBJECTIVE - MEETINGS

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

- preparation of and response to a meeting notice
- preparation of a written motion
- preparation of a written resolution
- preparation of minutes of class meeting
- preparation of minutes of an in-school or outside organization meeting
- answer open book test of precedence of motions; a close-book short response or matching test; and, a series of theory questions (some open- and some close-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.

LEARNING ACTIVITIES AND APPLICATIONS

- LECTURE Instructor and demo
- PARTICIPATION Mock Meetings and attendance at 1 - 2 out-of-class meetings
- FILMS Parliamentary Procedures:  
Parliamentary Procedures, Mtry of Ed. (000575), 22-min. b&w 16mm  
 Informal Meetings:  
Meetings, Bloody Meetings. 16mm, 30 min., col. - Ministries of C&R or Education (014079), or Indian Affairs on video.  
 Sault College - Off. Adm. video

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

- ASSIGNED The Meeting Will Come to Order (if available)  
 READINGS Robert's Rules of Order

EVALUATION

1. Test #2
2. Minutes of in-class meeting  
Attendance of outside association meeting(s)
3. Assignments - Motion, Resolution, Agenda and Notice

ESTIMATED TIME TO ACHIEVE

(15) 50-min. periods plus whatever time can be used from the balance of lecture time in the filing sessions.

OBJECTIVE - ADMINISTRATIVE PAPERWORK

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 practical

EVALUATION

Test #1

ESTIMATED TIME TO ACHIEVE

(2) 50-minute class periods

OBJECTIVE - REFERENCE MATERIALS

Given a project and a test on information filed in a personal card box, the student will demonstrate ability to find and record names of individuals, ministries, agencies, etc., applicable titles, telephone numbers, addresses, etc.

LECTURE Instructor

SLIDES Community Information Centres in Ontario - Mtry.  
Culture & Rec.

DEMOS Postal Code Directory  
Zip Code Directories  
City Directory  
Telephone Directory (government, kwick-find)  
Community Information Directory  
Telex Directory  
Fax Directory  
Business Card Directory

APPLICA- Personal Card Box Directory  
TION

EVALUATION

Assignment #7

ESTIMATED TIME TO ACHIEVE

(3) 50-minute periods

OBJECTIVE - 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
- methods of 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** Putting It in Writing, TV Ontario, co., S.C. A-V (expires Apr. '90)
- DEMOS** Word Processor (if students feel necessary)

EVALUATION

Assignments 8, 9, 10, 11, 12

ESTIMATED TIME TO ACHIEVE

(4) 50-minute periods

OBJECTIVE - 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 respond to questions:

- 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 Processing Incoming and Outgoing Mail, film-strip & cassette, col - Secretarial Centre

SPEAKERS Courier Service (if available)

DEMOS Fax - Purchasing Dept., Sault College (if possible)

HANDOUTS Courier Rate Sheets, Canada Post Rate Sheets

EVALUATION

Test #4

ESTIMATED TIME TO ACHIEVE

(2) 50-minute periods