

SAULT COLLEGE OF APPLIED ARTS & TECHNOLOGY

SAULT STE. MARIE, ONTARIO

COURSE OUTLINE

OFFICE MANAGEMENT

COURSE TITLE:

BUS224

IV

CODE NO.:

SEMESTER:

NATIVE COMMUNITY WORKER

PROGRAM:

ELSIE LALONDE

AUTHOR:

1992 01 01

DATE:

PREVIOUS OUTLINE

1991 01 01

DATED:

New: \_\_\_\_\_

Revision: \_\_\_\_\_

X

APPROVED:

*Elsie Lalonde*  
DEAN, SCHOOL OF BUSINESS &  
HOSPITALITY

DATE



OFFICE MANAGEMENT

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COURSE NAME

COURSE CODE

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 an 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. Understand the value and use of time management techniques as well as be able to apply same to diaries, calendars, reporting forms, etc.
2. Understand 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 meetings, 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.



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5. Understand the value and the application of such administrative paperwork as:

Travel Expense Request Forms  
Travel Expense Reports  
Petty Cash  
Cheque Requisitions

Travel Advance Forms  
Government Forms  
Purchase 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.

**I. 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 9 to 16



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 this course have not been achieved and the course must be repeated.

EVALUATION

Participation Activities	=	25%
Filing - (8) Quizzes (7 @ 2%; 1 @ 11%)	=	25%
Tests - 4 quizzes on Minutes at 4@	=	25%
- 1 test at 9 -Minutes	=	25%
- Office Management	=	20%
- Perpetual Diary	=	5%
		100%



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" (60%). 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 the 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 the 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 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.



VI. REQUIRED STUDENT RESOURCES:

Textbooks/Materials:

Gregg Quick Filing Practice, 3rd Edition, 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) 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)

Fax Directory

Native Community Branch Directory

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

Others - to be advised

VIII. SPECIAL NOTES - none



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<u>WEEK OF</u>	<u>CLASS</u>	<u>TOPIC</u>
Jan. 6	1	School not in session
	2	Review Objectives
	3	Time Management - To Do, Time Study
Jan. 13	4	Filing - Set up Kit; Ex. 1, 2
	5	Telephone - Film, Message Pad
	6	Telephone - Telephone Directory
Jan. 20	7	Filing - Ex. 3,4,5 (Omit 6)
	8	Purchase Order, Petty Cash
	9	Travel Requisition, Cheque Req.
Jan. 27	10	Filing - QUIZ #1; Ex. 7,8
	11	Travel Expense
	12	Dictation Techniques, Proofreading
Feb. 3	13	Filing - Ex. 9, 10
	14	Mail Processing
	15	Postal Directory; City Directory
Feb. 10	16	Filing - Ex. 11,12 (Omit 13)
	17	Copies (cc;bc; follow-up/tickler; chronological); Photocopy - req. form; reduction/enlarge; copyright
	18	Reference Books
Feb. 17	19	Filing - QUIZ #2; Ex. 14, (Omit 16)
	20	Test - Office Management Section
	21	Pending
Feb. 14		<b>BREAK</b>
Mar. 2	22	Quiz #3, Ex. 17, 18
	23	Meetings - Discussion of Parliamentary Rules; Film (if not previously shown); Intro. to Robert's Rules of Order Book as a reference; Bylaws; Script 4,5,6,7, M.W.C.O.



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<u>WEEK OF</u>	<u>CLASS</u>	<u>TOPIC</u>
	24	Meetings - Agenda, p. 4 - Preparation; Types - formal/informal, basic/advanced Terms - 9 from back of <u>The Meeting Will Come to Order</u>
Mar 9	25	Filing, Ex. 19
	26	Meetings - Quiz #1 on Agenda - Voting on Motions, p. 10-11; Terms - (9) from back of M.W.C.O.
	27	Meetings - Quiz #2 on Voting - Types of Motions, pages 11-12; 20 - Terms - 9 from back of M.W.C.O.
Mar. 16	28	Filing, Quiz #4; Ex. 20, 21
	29	Meetings - Quiz #3 on Types of Motions - Motions - Change, p.13-14 - 8 terms from back of M.W.C.O
		GOOD FRIDAY
Mar. 23	30	Filing - Ex. 22
	31	Meetings - Quiz #4 on Motions Change - Motions - Discuss Again, etc., p. 16-18 - 8 terms from back of M.W.C.O
	32	TEST #5 - all Terms back of M.W.C.O. plus 16-18
Mar. 30	33	Filing - Quiz #5, Ex. 23, Omit 24
	34	Meetings - p. 7,8,9 - M.W.C.O. Meeting Package - Part I
	35	Meetings - Meeting Package - Part II



<u>WEEK OF</u>	<u>CLASS</u>	<u>TOPIC</u>
Apr. 6	36	Filing - Quiz #6, Ex. 25
	37	Meetings - Meeting Package - Part III
	38	Meetings - Agenda (mini project pkg.)
Apr. 13	39	Filing, Quizzes #7 and #8 FINAL
	40	Motion, Resolution
	41	Notice of Meeting Project
Apr. 20	42	Perpetual Diary Quiz
	43	Informal Meeting
	44	-----

Any authorized missed test can be done in the Learning Assistance Centre with penalty per objectives - but, not after any test has been returned. If no test in the Centre, you do not qualify to write and will receive a 0.

Any class handout materials missed may be picked up from the Secretarial Centre in the morning.

Items where an Answer Key has not been provided may be checked at the Library reserved under instructor's name



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 non-essential, and colour coding.

FILMS Filing Procedures in Business, Ontario Dept. of Education (13 min., cir.) (Cat.#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.



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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	<u>Finding Time</u> , 16mm, 28 min., col. film Ministries of C&R (#16497) and also education Video Tape - Sault College - A/V - N.B. Also entitled, " <u>How to Control Your Time and Your Life</u> C255 Sault College (no expiry date) <u>A Team of Two</u> (Rev), col., (need special VHS), 30 min. - Ministry of Ed. <u>A Perfectly Normal Day</u> , 28 min., col. - Ministry of Education
LIBRARY	Reserve Reading - Circulation Desk - under name of Elsie Lalonde - <u>How to Control Your Time and Your Life</u>
DEMO	Tickler Files: Time Study - local native band office
APPLICATION	Perpetual Diary Maintenance 1 week maintenance of TO-DO list
HANDOUTS	"Procrastination", etc. - by instructor
<u>MATERIALS</u>	Perpetual Diary; To-Do List - instructor provided



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OBJECTIVE - ADMINISTRATIVE SKILLS

EVALUATION:

1. TEST #1 - Office Management  
Questions on Test #4 - (To-Do and Appointment Diary)
2. Perpetual Diary Test

TIME TO ACHIEVE: (2) 50-minute periods

LEARNING ACTIVITIES AND APPLICATIONS

LEARNING ACTIVITIES AND APPLICATIONS	REMARKS
LECTURE	Instructor lecture and demonstrations
FILMS	<p>Ministry of Education - <u>A Perfectly Normal Day</u>, 28 min., col., Ministry of Education</p> <p>30 min. - Ministry of Ed. <u>A Team of Two</u> (Rev), col., (need special VHS)</p> <p>CSSS Sault College (no expiry date) entitled, "How to Control Your Time and Your Life"</p> <p>Video Tapes - Sault College - A/V - N.S. Also</p> <p>Ministry of CAR (416497) and also education</p> <p>Finding Time, 16 min., col., film</p>
LIBRARY	<p>Reserve Reading - Circulation Desk - under name of <u>Elsie Lalonde - How to Control Your Time and Your Life</u></p>
DEMO	Tickler files: Time Study - local native band office
APPLICATION	<p>1 week maintenance of TO-DO list</p> <p>Perpetual Diary Maintenance</p>
HANDOUTS	"Procrastination", etc. - by instructor
MATERIALS	Perpetual Diary; To-Do list - instructor provided



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OBJECTIVE - ADMINISTRATIVE SKILLS (cont'd)

TELEPHONE

Given short essay and application questions on recoding 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.	<u>How to Lose Your Best Customer</u> , 16mm, 28-min, col. Secretarial Centre or Mtry. of C&R <u>Talk Business</u> , TV Ontario - Sault College A-V (expires April '90)
SLIDES	<u>Telephone Techniques</u> - Secretarial Centre
HANDOUTS	Message Pads, Message Record Books, Logging Sheets

EVALUATION:

Test #1 - Office Management

ESTIMATED TIME TO ACHIEVE: (2-3) 50-minute periods



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**OBJECTIVE - MEETINGS**

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

- preparation of a written motion
- preparation of a written resolution
- 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, ec.

**LEARNING ACTIVITIES AND APPLICATIONS**

**LECTURE** Instructor and demo

**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 READINGS** The Meeting Will Come to Order (if available)  
Robert's Rules or Order

**EVALUATION:**

1. Tests (5) quizzes
2. Minutes - written participation - How to Streamline Your Minute Taking Techniques
3. Assignments - 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.



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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
- cheque requisition
- petty cash voucher

LEARNING ACTIVITIES AND APPLICATIONS

LECTURE	Instructor
HANDS-ON	In-class practical

EVALUATION:

Participation Exercises  
 Test #1 - Office Management

ESTIMATED TIME TO ACHIEVE: (2) 50-minute class periods



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OBJECTIVE - REFERENCE MATERIALS

Given a project:  
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)  
Fax Directory  
Community Directory

EVALUATION:

Test #1 - Office Management

ESTIMATED TIME TO ACHIEVE:            (3) 50-minute periods



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**OBJECTIVE - CORRESPONDENCE**

Given essay type questions on a test, the student will demonstrate a basic knowledge of:

- methods of copying
- methods of proofreading and proofreading symbols
- methods of reproduction and copy control
- copyright
- dictation techniques

**LEARNING ACTIVITIES AND APPLICATIONS**

<b>LECTURE</b>	Instructor lecture and demonstration
<b>HANDOUTS</b>	Provided by instructor - e.g. Dictation Checklist, copyright regulations, proofreading reference chart, word processing requests, reprographic request forms, typestyle chart
<b>DEMOS</b>	Word processor (if students feel necessary)

**EVALUATION:**

Test #1 - Office Management

**ESTIMATED TIME TO ACHIEVE** (4) 50-minute periods



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Given 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
  5. postage services

**LEARNING ACTIVITIES AND APPLICATIONS**

LECTURE	Instructor
FILMS	<u>Processing Incoming and Outgoing Mail</u> , film-strip, and 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 #1 - Office Management

**ESTIMATED TIME TO ACHIEVE:** (2) 50-minute periods