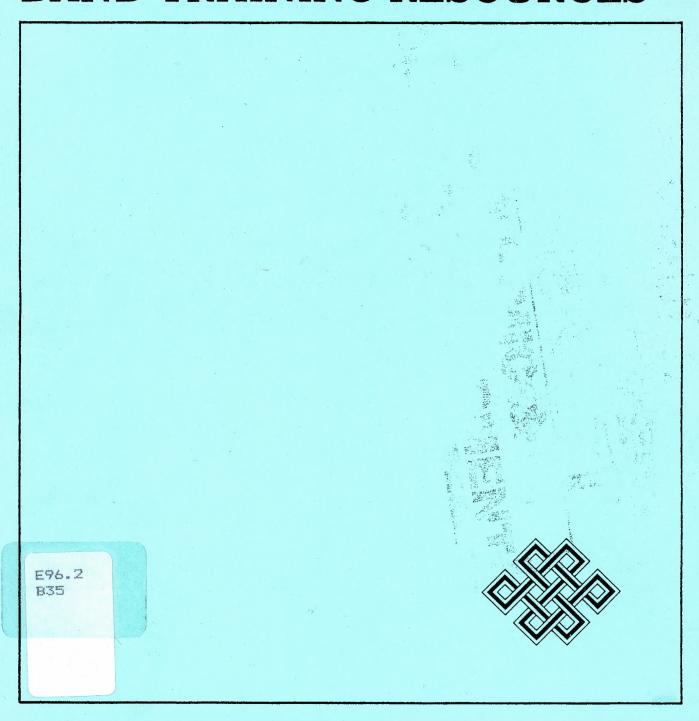
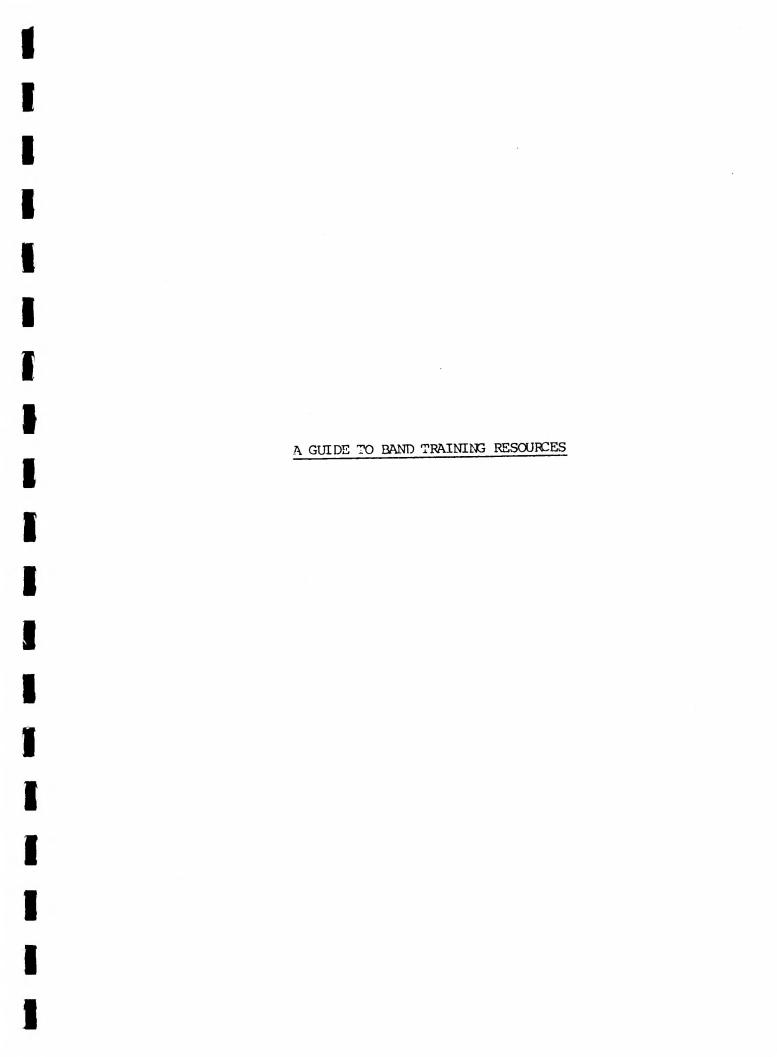
A GUIDE TO BAND TRAINING RESOURCES





BAND TRAINING AND ADVISORY SERVICES BRANCH INDIAN AND NORTHERN AFFAIRS CANADA



A Guide to Band Training Resources

This guide to training resources was prepared by the Band Training and Advisory Services Branch of the Department of Indian and Northern Affairs. It is intended to provide information on training materials and programs available to Indian Bands from various Indian organizations and Government agencies.

While this guide is by no means completely comprehensive of all training materials available in the public and private sectors, it is hoped that it will provide basic reference points which touch upon the major areas of concern to Bands.

Since new training materials and programs are constantly being developed, and existing programs are continuously being revised, this guide has been designed to allow new and updated resource descriptions to be inserted.

September 1981

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Institute for the Development of Indian Government

(IDIG)

Band Development Training Program

The Band Development Training Program is a program that was developed to train Indian community leaders who wish to acquire the personal and economic development skills and knowledge required in assisting a community's development. This training program uses a group process approach. A facilitator/trainer assists participants in their learning through active involvement and participation. The program is divided into four sections:

- Section 1: Problem-Solving and Communication.

 This section of the training program is concerned with the development of self-confidence, as well as skills and knowledge in the areas of problem-solving, communications, interpersonal relations and leadership.
- Section 2: Understanding Government.

 This section deals with understanding government at all levels. It also deals with bureaucracy, government budgeting, government services, the Indian Act and by-laws.
- Section 3: The Economic Development Process.

 This section deals with the skills and knowledge needed in assisting a community with its economic development. The lessons deal with citizen participation, the development and implementation of an economic development plan.
- Section 4: Basic Management and Administration.
 This section is an introduction to the field of management and forms of business organizations.

The Band Development Training Program consists of 78 lessons which require 10-12 weeks training time. It is possible, however, to select those lessons or sections which meet the needs of a particular group.

This program was developed by the Institute for the Development of Indian Covernment. A more detailed explanation of this training program is available by requesting the brochure: "Introducing the Band Development Training Program".

- Introducing the Band Development Training Program, 40 pages.
- Band Development Training Program: Facilitator's Guide, Vols. 1, 2, 3, 4, 5.
- Band Development Training Program: Participant's Handbook, sets for 16 participants.
- Band Development Training Program: Resource Kit

Small Business Management

The Small Business Management course is a practical program designed to prepare Indian people for jobs as owner-manager of their own businesses or for management positions with businesses owned by Bands, co-operatives and others. The course is based on an introductory approach and undertakes to meet the needs of residents who have only a limited knowledge of business. The subject areas consist of topics such as: management process, marketing, finance, accounting, bookkeeping, personnel management, business law, personal finance, business communication, production management and office procedures.

The lectures method is used very little. Instead, learning is facilitated through a group dynamics approach. Discussion is encouraged and participants become involved in the learning experience. Some examples of this approach are brainstorming, lecturettes, case studies, projectuals, tapes, role-playing, resource people and projects.

The course has been developed to be flexible in its use. Lesson materials and training guidelines are designed in detail so they are especially useful to the instructors who do not have extensive training in teaching business management: but who have extensive practical business experience.

The course is divided into nine different subject areas and consists of 134 lessons. It takes approximately five months of class time and one month of on-the-job training. There is an option of selecting only those sections that meet the needs of a particular group.

The Small Business Management course was developed by the Institute for the Development of Indian Government. A more detailed explanation of the course is available by requesting the brochure: "Introducing the Small Business Management Course".

- Introducing the Small Business Management Course, 24 pages.
- Small Business Management Course: Instructor's Manual, Vols. 1, 2, 3, 4.
- Small Business Management Kit, material for 16 participants.
- Small Business Management Overhead Projectuals, set of 80 for instructing.

Life Skills

Life skills are those problem-solving skills and human relations skills, which, when applied appropriately, lead to responsible management of one's personal affairs. The personal affairs studied in the Life Skills program include self-development, leisure time, job, community and family.

The need for a "life skills" program becomes evident when we realize the amount of change that has taken place in the last half of the twentieth century. The need to adapt, develop new living skills and change our life styles, has called for solutions to these problems. The Life Skills program was developed to help face some of these new challenges.

During "life skills" training, the students (in a group situation) apply problem-solving skills to real-life situations. Students learn skills of effective listening, questioning, interviewing, budgeting money and time, using feedback and goal setting. They apply these skills in settings which include television playback, job interviews, helping fellow group members, solving problems at home and participating in community affairs.

The Life Skills instructor, called a coach, is responsible for demonstrating and facilitating the development of new behaviours in a small group and through systematic skill development, trains people as effective problem-solvers.

The Life Skills program was developed by the Institute for the Development of Indian Government.

- Reading in Life Skills, 257 pages
- Life Skills Coaching Manual, 580 pages
- Dynamique de la vie (Livre du meneur), 569 pages.
- Problems and Needed Life Skills of Adolescents, 378 pages.
- Life Skills Course for Corrections, 109 pages.
- Dynamics of Life Skills Coaching, 239 pages.
- Life Skills for Northern Adolescents, 427 pages.
- Evaluations of Life Skills Training, 171 pages.
- Life Skills Kit of Audio-Visual Learning Aids.

Generic Skills

Generic Skills have been defined as those behaviours which are fundamental to the performance of many tasks carried out in a wide range of occupations. Generic Skills include many of the concepts and skills generally referred to as mathematics skills, communication skills, reasoning skills, interpersonal skills and manipulative skills.

Excluded from Generic Skills are knowledge and procedural items which are unique to specific employers and which may be obtained as part of the orientation to a new job.

A number of studies and surveys have been conducted to determine the generic skills in some 76 occupations across Canada. Based on these studies and surveys, the Institute for the Development of Indian Government has developed four Generic Skills Instructional Packages in the adult grade 5-10 level. The four packages cover reading, writing, listening and mathematics. In addition IDIG has also written various Reports based on the generic skills studies and surveys, and has developed a Generic Skills Kit for the Collection and analysis of occupational information.

The following aids and materials are available:

(A) Instructional Materials

- 1. Instructional Packages for students (1976):
 - a. Generic Skills Reading: 16 unit booklets
 - b. Generic Skills Writing: 6 unit booklets
 - c. Generic Skills Listening: 10 unit booklets
 - d. Generic Skills Mathematics: 21 unit booklets

The content of these four courses is intended for use at the Basic Training and Skill Development level, from about adult grade 5 to 10.

- 2. Generic Skills Listening Tapescripts (1976, 128 pages). This book of tapescripts was prepared to accompany the Generic Skills Listen course.
- 3. Generic Skills Curriculum Instructor's Book (1976, 29 pages).

(B) Reports on Generic Skills Studies and Surveys

 Generic Skills Research and Development (1975, 208 pages).
 This book contains a valuable set of specifications to guide the instructional design of curricula and learning materials for the occupational training of adults in manpower training programs. It includes chapters on the objectives and history of the Generic Skills studies, skill taxonomies, experimental data collection instruments, reports on three surveys, processes of analysis and synthesis to isolate clusters and to determine care clusters, and research findings using factor analysis.

- 2. Handbook of Occupational Information (1975, 331 pages). This handbook summarizes and synthesizes the data obtained from surveys of 76 occupations involving 830 workers, 1120 supervisions in a variety of rural and urban settings ranging from Halifax to Vancouver.
- 3. Other books published as interim reports:
 - a. Generic Skills for Occupational Training (1973, 162 pages).
 - b. Generic Skills Technical Supplement (1973, 335 pages).

(C) Generic Skills Survey Kit

1. Generic Skills Kit for the Collection and Analysis of Occupational Information (1975)

The chief item in the kit is the 284 page Generic Skills Questionnaire. The introduction contains instruction for a Generic Skills Occupational Survey and how to use the materials in the kit.

Included also in the kit are 15 copies of the Occupational Skill Analysis Record Form and 15 copies of the Occupational Profile Form. These are expendable forms which may be duplicated for more extensive surveys.

Fluency First: An Oral English Course

Fluency First: An Oral English Course is an instructional program with the objectives of developing oral communications skills in English as a second Language to the native language of Indians, Inuit and Métis in Canada. The program has three sub-courses:

Skills of English

This covers the structural aspects of the English language including pronunciation, vocabulary and sentence structures.

Communication in English:

This provides relevant practice exercises in the English language.

Prepration for Reading and Writing:

This involves activities in which the students begin to write words and sentences which have been used in the above two sub-courses.

The instructional components include: instructor's manuals, students book, pictures and cassette tapes. Cassette tape recorders are required for each student.

Fluency First was developed by the Institute for the Development of Indian Covernment.

- Fluency First Theory and Methods (a manual for Administrators and Teachers), 160 pages).
- Preparation for Reading and Writing, (185 pages).
- Fluency First Instructor's Manuals, Stages A to I, (set of 9 books).
- Fluency First Student's Manuals, Stage A, B, C, D, E, F, G, H, I,
- Fluency First Skills of English (set of 36 picture books).
- Picture Books, 1-20
- Picture Books, 21-36
- Story Practice Picture Cards, (set of 18 envelopes).
- Fluency First audio-cassette tapes, (set for Units 1-36).
- Fluency First individual tapes
- Examination Set (sample manuals and student materials).
- A Plan for Fluency First (original concept study), (117 pages).
- Fluency First Instructor Training Course, 1972 (145 pages).

Basic Literacy for Adult Development

BLADE (Basic Literacy for Adult Development) is a completely individualized instructional program designed for adults who have had little or no schooling. The objectives are to enable adults to upgrade their reading, communciation, and mathematical skills to a level of approximately grade four.

The program is designed for individualized instruction, enabling adults to begin at their functional level and proceed according to their need and ability. While a variety of teaching methods and materials can be used, the basic teaching method is that of textbooks augmented with cassette tapes and reading assignments.

The materials for this program are packaged in kits which are designed for groups of about fifteen students. These kits include: an instructor's manual, student's manuals and textbooks, study sheets, cassette tapes, study cards and exercises.

This program was developed by the Institute for the Development of Indian Government. A more detailed explanation of the BLADE Program is available by requesting the brochure: "Theory and Methods of the BLADE Program".

- Theory and Methods of the BLADE Program, (a manual for administrators and teachers), (72 pages).
- BLADE Program Instructor's Manual, (111 pages).
- BLADE Instructor's Manual Supplement, (140 pages).
- Complete set of BLADE Communications and Mathematics materials.
- Complete set of BLADE Communications materials only.
- Complete set of BLADE Mathematics materials only.
- BLADE Communications Kit No. 1 (Tapes and books for Level 1 only).
- BLADE Communication Kit No. 2 (Tapes and books for Levels 2, 3, and 4).
- BLADE Mathematics Kit No. 2 (Tapes and books for Levels 2, 3, and 4).

LINC (Learning Individualized for Canadians)

LINC (Learning Individualized for Canadians) is an instructional program in communications and mathematics covering approximately the equivalent of grades 5 to 10. The program was designed as a basic skills upgrading and refresher program for adults who want to acquire the prerequisites for occupational training for which the entry requirement is normally grade ten or equivalent.

The LINC Program is designed to use as an individualized teaching process with prescribed learning activities and continuous evaluation. A variety of teaching techniques and materials can be used.

The program includes three sub-courses: Developmental Reading, Functional Reading and Mathematics. The teaching components are manual and classroom kits. There are three classroom kits; one for each sub-course. Each kit accommodates 15 people and contains placement inventories, instructional prescription sheets, instructional objectives and progress sheets.

This program was developed by the Institute for the Development of Indian Government. A more detailed explanation of The LINC Program is available by requesting the brochure: "Establishing the LINC Program".

- Establishing the LINC Program (a manual for administrators and teachers) 75 pages.
- LINC Mathematics (Instructor's Manual), 368 pages.
- LINC Development Reading (Instructor's Manual), 300 pages.
- LINC Functional Reading (Instructor's Manual), 300 pages.
- LINC Skill Development Series (Instructor's Manual), 397 pages.
- Mathematics Kit, (1 box: containing materials for 15 students).
- Developmental reading Kit, (1 box: containing materials for 15 students)).
- Functional Reading Kit, (1 box: containing materials for 15 students).
- Skill Development Kit, (1 box: containing materials for 15 students).
- Communication Kit Complete, (3 boxes: Developmental Reading, Functional Reading and Skill Development Kits).
- Communications Developmental Reading Kit complete, (2 boxes: Developmental Reading and Skill Development).

CREATING A CAREER

"Creating A Career" is an instructional program designed to help the student develop career planning and job search skills. The content is organized into four main topics: self-development, knowledge of the world of work, decision-making strategies and job search skills.

The program has been designed to meet the needs of youth between the ages of 15 to 25. It can be presented in approximately 40 to 50 classroom hours of instruction or individual work. Each topic is designed to stand by itself in relation to the others - therefore, the program can be conducted in whole or in part.

The instruction components include: an instructor's manual, a student's workbook, two small text books and an occupational exploration kit. Some supplementary materials, such as information on occupations and standard testing materials, are also required.

Creating A Career was developed by the Institute for the Development of Indian Government.

- A Job Search Guide.
- A Career Planning Guide.
- Career Planning and Job Search Workbook.
- Instructor's Manual.
- Canadian Occupational Groups.
- Educational Kit (keysort).

Bonne Ecoute

BONNE ECOUTE (Listening Practice in French for non-Francophones) is a program designed to assist persons who can read French with fair understanding; but who experience difficulty in speaking it or in comprehending the spoken language.

The course consists of 60 one-hour cassette tapes with accompanying French texts. The student first studies the French texts, then listens to the tape while following the written texts. After the necessary practice, the listener can set aside the written text and is able to listen to the tape with complete understanding. The tapes and texts cover over fifty topics ranging from sports, finance, literature, environment, government etc.

The student may begin the course at whatever phase offers an appropriate challenge. The only prerequisite for the course is the ability to read the texts with the aid of a good dictionary. In order to save time, approximately half of the listening units have an English translation alongside the French.

The tapes and the texts can be re-used indefinitely. Since the tapes and the texts are contained in 25 separate albums, one course can accommodate many learners at one time.

BONNE ECOUTE was developed by the Institute for the Development of Indian Government.

Oo-Za-We-Kwun Training Centre

Band Economic Development Worker Training

Band Economic Development Worker Training is a practical twelve week program designed for Band Economic Development Workers. The duties and responsibilities of a Band Economic Development Worker will vary depending on the band's needs, goals, available resources, its readiness for economic development or its proximity to off-reserve economic potential, etc. The job of the Band Economic Development Worker involves the planning, organizing and promoting of economic development according to the specific needs and resources of the reserve for which he is working. This program provides training and information which will enable the participants to develop the skills needed to effectively carry out their jobs.

The content of the training program is divided into six subject areas. They are as follows:

1. The Economic Development Process

These lessons show the participant how to analyze a community to identify potential business opportunities, how to involve community residents in community growth planning, and how to implement an economic development plan.

2. The Management Process

These lessons show the relationship between the management functions and the other subject areas. These lessons are used to show the participants how organizations are required to fill individual human needs, and how organizations use the management functions to reach their goals.

3. Financial Management for Development

This subject area, which requires the most class time, introduces the participant to the techniques of bookkeeping, preparation of financial statements, and how to reach financial data concerning a business or a business opportunity.

4. An Introduction to Business Law

This subject area introduces the participant to some of the fundamentals of business law. The participants study the different forms of business organizations, the conditions for contracting and special types of contracts, and topics related to the ownership of property.

5. Understanding Government

These lessons introduce the participant to the government structure at the federal, provincial, and local levels, and also to the services available at each level.

6. Problem-Solving and Communications

These lessons enable the participant to effectively solve problems and to communicate effectively with many different groups of people.

The Band Economic Development Worker Training Program was developed at the Oo-Za-We-Kwun Centre and is made available through the Band Training and Advisory Services Branch, Department of Indian and Northern Affairs.

Basic Management Training

Basic Management is a practical, five month training program which is designed to enable the participants to develop the skills and techniques necessary to effectively manage a business enterprise. The objective of the program is to prepare the participants who have likely had little experience in business, to be managers of business, government agencies, local administrations, and other organizations. Some are ready to start their own business on completion of the program; others will progress through various phases of on-the-job training as clerks, project officers or assistant managers.

The program covers the following topics:

1. The Management Process

These lessons show the relationship between the management functions and the other subject areas. These lessons are used to show the participants how organizations are required to fill individual human needs, and how organizations use the management functions to reach their goals.

2. Marketing Management

The lessons in this subject area introduce the participant to the many activites involved in moving goods and services from the producer to the consumer.

3. Personnel Management

The personnel management lessons deal with the human resources and the organization. The lessons examine the various styles of leadership and their effect on employees; the processes of recruiting, selecting, and training employees; and methods of evaluating and motivating employees.

4. Introduction to Business Law

This subject area introduces the participant to some of the fundamentals of business law. The participants study the different forms of business organizations, the conditions for contracting and special types of contracts, and topics related to the ownership of property.

5. Production Management

The participant is introduced to various techniques of managing a production oriented business. Some of the techniques are work flow analysis, quality control, and plant location.

6. The Economic Development Process

These lessons show the participant how to analyze a community to identify potential business opportunities, how to involve community residents in community growth planning, and how to implement an economic development plan.

7. Finance, Accounting, and Bookkeeping

This subject area, which requires the most class time, introduces the participant to the techiques of bookkeeping, preparation of financial statements, and how to reach financial data concerning a business or a business opportunity.

8. Business Communications and Problem Solving

These lessons enable the participant to develop the skills necessary to effectively solve business problems, and to communicate alternative lines of action to employees, fellow-managers, clients, financiers, suppliers, etc.

9. Personal Finance

The manager must be able to manage his personal affairs. The participants are therefore introduced to such topics as family budgeting, personal insurance, personal credit, and wills.

10. Government

These lessons introduce the participant to the government structure at the federal, provincial, and local levels, and also the services available at each level.

The above skills are developed by the use of a variety of techniques and methods. An instructor leads activities and guides the participants to see any relationship between the skills being developed and their existing knowledge and experience. The participant with the aid of projectuals, case histories, films, role plays, reading, projects, business games, discussions, and individual assignments is actively involved in the learning process.

The Basic Management Training Program was developed at the Oo-Za-We-Kwun Centre and is made available through the Band Training and Advisory Services Branch, Department of Indian and Northern Affairs.

Band Management Training

The Band Management Training Program adapts the positive management techniques and practices of today to meet the special needs and priorities of Bands. The program is designed to enable Band managers and staff to deal effectively with resource management, financial control, personnel administration, short and long range planning, and communications.

The total training concept allows increased opportunity for all Band staff to be involved in the development process and to increase their competencies as they become involved with expanded job responsibilities.

The following is a list of the course topics covered in a 35 week time period:

1. Oral Communications Part I

These lessons are aimed at developing the ability of speaking to small groups in an organized, clear, understandable, and therefore, confident manner.

2. Oral Communications Part II

These lessons focus on improving and refining public speaking skills necessary for formal presentation.

3. Written Communication

These lessons are aimed at developing clear writing skills, as well as memo, letter, and report design skills.

4. Organizational Development

These lessons examine the impact of human behaviour on the formal and informal organization, with the objectives of bringing about greater levels of personal and interpersonal effectiveness within the band's organization.

5. Double-Entry Bookkeeping

These lessons introduce the mechanics of the double-entry system of accounting from recording transactions to financial statement preparation. These lessons also provide the foundation of understanding to work with any other accounting system, e.g. small business bookkeeping.

6. Band One-Write Bookkeeping

These lessons provide an operational understanding of the bookkeeping procedures and forms of the Band One-Write System (Bishop).

7. Financial Management

These lessons introduce the use and analysis of the end products of recording and financial related data. These lessons also introduce a variety of financial (support) systems.

8. Management Process

These lessons study the planning, organizing, directing and controlling functions of management in order to build skills and improve business problem-solving abilities.

9. The Law and Band Government

These lessons provide band managers with a basic understanding of legal matters applied to economic activities for more effective planning and decision-making.

10. Economic Development Administration

These lessons provide band staff with the opportunity to experience and perform all the tasks involved in the process of economic development.

11. Economics for Managers

These lessons introduce micro (business) and macro (economy) economics concepts and ideas that assist in solving business problems.

12. Government-Band Interaction

These lessons increase band staff's understanding of the functions, acts, services, and programs, of the various levels of government so that band government may operate more effectively.

13. Personnel Responsibilities

These lessons build skills in: recruitment of staff, training methods, motivation and discipline methods, pay systems, setting standards of performance and evaluation of individual performance.

14. Supervisory Responsibilities

These lessons inform the newly appointed supervisor about his job.

15. Production Management

These lessons enable participants to recognize and apply principles and practices related to a band owned manufacturing or production-related enterprise.

16. Marketing and the Band Enterprise

These lessons introduce the importance of the marketing concept, the economic principle of the multiplier effect in a developing community, and activities that enhance a band business.

17. Group Dynamics

These lessons focus on improving the task orientations and group building functions of band staff, committees, and other community groups.

18. Project Management

These lessons are aimed at developing skills and problem solving abilities necessary to effectively supervise band projects of a short term nature.

19. Social Development Administration

These lessons familiarize band staff with the administrative requirements of, and federal/provincial/municipal relationship to, the band social development program.

20. Office Management

These lessons provide band staff with the knowledge of accepted offfice procedures.

21. Fundamentals of Merchandising

These lessons inform band administrators and managers of band enterprises about methods used to bring goods and services to the market, so that consumers can obtain the greatest benefit.

22. Property Management

These lessons introduce strategies and information that assists in realizing maximum benefit for land and other band properties.

Participants play an active part in the learning process; therefore, less emphasis is placed on lectures and more on projects, group discussions, role plays, individual assignments, resource personnel, presentations, case studies and field work.

To allow Band managers and other key personnel to attend training sessions without seriously disrupting the day to day operation of the Band administration, participants attend courses for short periods (2-3 days, to 1-2 weeks). They then return to their reserve and apply the knowledge acquired and complete assigned exercises. For potential or new band staff, or band staff in positions allowing them to leave the band office for longer periods, selected modules may be combined and training extended to five or six weeks in length.

The Band Management Training Program was developed at the Oo-Za-We-Kwun Centre and is available through the Band Training and Advisory Services Banch, Department of Indian and Northern Affairs.

Project Managers Training

The Project Managers Training Program is designed for native people who have had limited business experience, experience in Band affairs, and a minimum grade 8 education. After successful completion of this program participants will be able to develop:

- (a) Competence in the major areas of knowledge related to business.
- (b) Decision making skills in a business context.
- (c) Business responsibility.
- (d) Human relation skills necessary for dealing with clients, suppliers, financiers, and others.
- (e) Self-confidence.

The major subject areas covered are:

1. Oral Communications

The Project Manager must be able to communicate with many different groups of people. Therefore, it is necessary that he/she develop oral communication skills which will enable him/her to carry out this aspect of the job, as well as develop the necessary confidence in himself/herself.

2. Written Communications

The Project Manager will find that he/she will be expected to prepare reports, written project proposals, and information inquiries and replies. It is therefore essential that he/she develop basic written communication skills to carry out his/her duties.

3. The Economic Development Process

The Project Manager must understand how development happens, what steps are involved, where to start, and how to involve community residents.

The training in this subject area will assist the Project Manager develop the skills and gain the necessary background information to be an invaluable resource to his/her community in developing socio-economic development plans and actually initiating projects.

4. Project Recordkeeping

The Project Manager will be expected to provide Chief and Council, project funders, and other agencies with financial information concerning the project(s) he/she is managing. Therefore, he/she must be familiar with the money side of business.

The training in this subject area will assist the Project Manager develop basic bookkeeping and financial management skills in order to control the monetary aspects of actual and proposed projects.

5. Project Management

As the Project Manager will be responsible for operations of the project(s), he/she should be familiar with the role, responsibilities, and duties of management.

This subject area is designed to acquaint the Project Manager with the management Process and various techniques (styles) of management.

Based on the concept that the skills the participants develop can only be achieved through practice, the "Problem Solving" technique is utilized. Thus enabling the participants to become aware of a difficulty and to acquire the ability to clarify the problem, collect information related to the problem, examine alternatives and select the alternative which seems most appropriate.

The Project Managers Training Program was developed at the Oo-Za-We-Kwun Centre and is made available through the Band Training and Advisory Services Branch, Department of Indian and Northern Affairs.

Training for Trainers

Training for Trainers is a program designed to provide skills and knowledge in planning, developing and conducting training workshops. It is a short, intensive course in how to be a training facilitator and it is aimed at Band members who frequently find themselves in the position of having to deliver training of various kinds.

The course is two weeks in length with a break of four to five weeks in between the first session and the second. This is done in order to allow participants to pratice, in their own work environments, the skills obtained during the first session.

The course is conducted on the principle of "learning by doing". Material of a theoretical nature is presented in various forms, such as lecturettes or discussion groups, and is then followed by participation in structured activities designed to reinforce and enhance the knowledge base.

Part One: Designing a Workshop covers the following topic areas:

- Needs Identification: various methods
- Setting Learning Objectives: factors essential to success
- Designing Learning Activities: relating to previous planning
- Planning the session: agenda/format
- Evaluating the Session: various methods

Part Two: Conducting Training covers the following topic areas:

Facilitator Skills: understanding group dynamics, communications, self-concept, setting objectives for presentations, preparing an outline.

Group Skills: using time effectively, group decision-making, sharing information, clarifying, group problem-solving, leadership styles, group building and maintenance.

(Part Two of the program is geared towards activities in which the participants take part, i.e. lecture presentations to the group, etc.)

The Training for Trainers program is available through the Band Training and Advisory Services Branch, Department of Indian and Northern Affairs.

Band Training and Advisory Services Branch

Remote Learning

Remote Learning is an innovative approach to the training of native people across Canada who live in remote or isolated communities. Successfully tested in two Yukon communities, the remote learning concept combines home study techniques with a facilitator approach to delivery.

The basic idea of this program is to deliver training courses, available at various academic and vocational institutions across Canada, to isolated native communities. Training materials are delivered, by mail or through a training facilitator, directly to the participants. Thus, the participants, whom would normally not be able to benefit from conventional training (due to family, distance, etc.), are allowed to study at their own pace in the comfort of their own homes.

In order to provide assistance, encouragement and guidance, a local facilitator visits the participants in their homes. In addition, Adult Education Classes, consisting of group discussions and lectures, are held regularly with the facilitator in order to discuss problems etc.

Over one hundred academic and vocational institutions that can participate in this type of training have been identified and the type of training offered is diverse. A "Remote Learning Orientation Package" has been developed to identify all participating institutions and the training materials and programs that are available through them.

Remote Learning is funded through the Band Training and Advisory Services Branch of the Department of Indian and Northern Affairs. Information pertaining to Remote Learning can be obtained through Indian Affairs Regional Offices.

Band Expenditure Planning

Band Expenditure Planning is an introductory training package for Band Managers and Administrators. The package consists of slide/sound modules and lecturette/discussion sessions, and is designed to provide basic information on various proven methods of controlling and planning a budget.

Several brief slide/sound presentations, varying in length from 5 to 10 minutes, are used to describe, with concrete examples, various methods of budget control; for instance, the principles of Zero-Base Budgeting are examined in detial.

Following each slide/sound presentation, workshops are conducted using a variety of techniques ranging from lecturettes to case studies to discussion groups. The format and content of each workshop is detailed and laid out for easy delivery with a minimum of necessary background knowledge by the facilitator.

Slide/sound modules and related workshop outlines and materials can be obtained from:

Band Training and Advisory Services Department of Indian and Northern Affairs Les Terrasses de la Chaudière OTTAWA, Ontario KlA 0H4

Band Social Assistance Administration Training

Band Social Assistance Administration is an individualized training course aimed at enhancing the effectiveness and efficiency of Band-employed social assistance administrators in the performance of their duties.

The course, which was developed by St. Francis Xavier University in conjuction with the Department of Indian and Northern, covers the wide range of government policies, regulations and guidelines pertinent to social assistance at the Band level; a breakdown of the skills and knowledge required to carry out the job; role definition; basic counselling techniques; current theories and concepts related to the field; and techniques in dealing with conflict and stress.

The course consists of a series of modules containing video-tapes and exercises, and is designed for self-paced home-study. If successfully completed, the course will carry Professional Development Continuing Education Unit Credit to the extent of providing the successful learner with a "Certificate of Competency" in <u>Band Social Assistance</u> Administration.

So that the University can exericse control over the quality of the adult learner's performance, the University will maintain in its possession the written material and the Department of Indian and Northern Affairs will maintain in its possession the video-tapes. This enables the Department to provide, free of charge, to its clients a video information package without credit or performance requirements.

Further information on Band Social Assitance Administration Training may be obtained from:

St. Francis Xavier Unviersity Antigonish, Nova Scotia

Band Training and Advisory Services Branch

or

Social Services Branch Department of Indian and Northern Affairs Les Terrasses de la Chaudière Ottawa, Ontario KIA OH4

Band Technical Training

Band Technical Training is a training program designed for Indian Bands by the Technical Services and Contracts Branch of the Department of Indian and Northern Affairs. The program, which consists of six technical training topics, is intended to help Bands to manage their physical assets and to reduce the loss of life and property resulting from fire-related causes. All the courses have been field-tested on various reserves across Canada and are made available through Indian Affairs Regional Offices.

The following is a listing of those courses that are available to Bands:

Housing

"Home Maintenance and Repairs" is a practical course covering such topics as painting, plumbing, electrical repairs, heating and others. The duration of the course will depend on the number of topics desired by the Band.

Fire and Safety

"Fire/Safety Stories" is a series of six audio-visual training packages in English and French, for children in primary grade school. The series, which was successfully tested on the St. Regis Reserve, is intended for implementation in reserve school curricula. Each package in the series contains a five minute video-taped fire-safety lesson, learning support questions, colouring sheets and decals.

An instructional booklet entitled "Fire - Friend or Foe" is also available. The booklet, in English and French, describes basic fire-safety procedures for school-age children.

"Fire Prevention for Adults" is a course for adults stressing home safety and the value and use of fire prevention and fire fighting devices.

Energy Conservation

"Re-insulating Existing Building" is a complete one-day course dealing with insulating techniques, materials and their relative cost-benefit, and how to avoid problems.

Project Management

"Project Management" is a technical training course which was developed to supplement the Institute for the Development of Indian Government (I.G.I.G.) general project management course. The course covers the application of project management processes to Band projects of varying technical scope and size.

Contract Administration

"Construction Contract Administration" is a basic, two-day, audio-visual course covering the administration of construction contracts including tendering and awarding contracts, contract management, etc.

Municipal Works

"How to Organize a Band Works Section" is a fundamental, one-day, audio-visual course on the procedures required to set up an efficient and effective band work section, including work planning, budgeting and operational procedures.

North American Indian Films Incorporated

North American Indian Arts and Crafts Film Series

The North American Indian Arts and Crafts Film Series is a cultural education program consisting of eighteen 16mm colour films which are available in both English and French. The distributor, North American Indian Films Inc., is an Indian owned company, dedicated to the production, promotion and distribution of culturally accurate films on the North American Indian. In 1977 and 1978, the Arts and Crafts Film Series was awarded silver medals in the Education Series category at the International Film and Television Festival of New York. The series includes the following films:

1. A PAIR OF MOCCASINS FOR MARY THOMAS (15 Minutes)

Mary Thomas is a Shuswap, Interior Salish Indian. In the film she shows and explains how she first prepares and tans the hide...and then makes a beautiful pair of moccasins.

2. JOE JACOBS - STONE CARVER (10 Minutes) CAYUGA

Joe Jacobs, a Cayuga Indian began carving to relieve boredom after a serious construction accident. His exceptional skill and craftsmanship is displayed in the film as he carves from stone, the lengendary "Crystal Bear".

3. A CORN HUSK DOLL BY DEANNA SKYE (11 Minutes) CAYUGA

Deanna Skye, a Cayuga Indian, is one of the few that still carry on the beautiful craft of making Corn Husk Dolls, using materials gathered from nature. Pause for a while with an Indian mother as she makes a Corn Husk Doll for her child.

4. A MICMAC SCALE BASKET (12 Minutes) MICMAC

The Micmac Indians have been making splint baskets out of black ash for hundreds of years. Rita and Noel Michael from Shubenacadie Reserve continue this ancient handicraft, creating many different styles to suit various needs. In this film they make a traditional scale basket, from rough log to the finished product.

5. A MALECITE FANCY BASKET (12 Minutes) MALECITE

Veronica and Jim Atwin, Malecite Indians from the Kingsclear Reserve have been making functional baskets for many years. The film shows how they select and prepare the materials and then make a beautiful fancy basket from black ash and sweetgrass.

6. A MOON MASK BY FREDA DEISING (10 Minutes)

Freda Deising, a Haida Indian of the Eagle Clan, is an outstanding artist of the North West Coast. For this film Freda carves a beautiful moon mask from alder and decorates the mask with abalone.

7. TONY HUNT, KWAKIUTL ARTIST (10 Minutes)

Tony Hunt, a Kwakiutl Indian, is the grandson of the lengendary Chief, Mungo Martin. Since his initial tutoring by his grandfather, Tony has become an artist of international recognition capable of working in many art forms. In the film Tony makes a beautiful silver spoon.

8. PORCUPINE QUILL WORK (10 Minutes) ODAWA

Bernadette Pangawish is an Odawa Indian from the Wikwemikong Reserve. Bernadette has been decorating items with porcupine quills for over fifty years. The film depicts her artistry as she decorates a box using a traditional geometric design.

9. A CEREMONIAL PIPE BY GUY SIWI (10 Minutes) ABENAKI

Guy Siwi, an Abenaki Indian is an outstanding jeweller and pipe maker. The "calument" or peace pipe has special reverence in Indian culture. For the film, Guy makes a traditional ceremonial pipe.

10. ROBERT BELLEGARDE, A PRAIRIE ARTIST (12 Minutes)

Robert Bellegarde is a Cree Indian from the Little Black Bear Reserve. Through his knowledge and interest, Robert draws traditional dress and colourful dance costumes, using contemporary pastels. In the film Robert displays his talent by recreating a portrait of an Indian Chief in colourful headdress.

11. BEADS AND LEATHER OF MANITOBA (10 Minutes) CREE

Cecelia Ross, A Swampy Cree Indian, makes beautiful leather clothing that is artistically decorated with intricate beadwork. In the film Cecelia makes a buckskin jacket for her husband

12. SARA SMITH, MOHAWK POTTER (18 Minutes) MOHAWK

Sara Smith is a Mohawk Indian from the Six Nations Reserve. Using contemporary pottery methods, Sara makes pottery of exceptional beauty. The designs she uses on her work are drawn from age old cultural symbols, such as the "Tree of peace", so exquisitely recreated on the vase she makes in this film.

13. BIRCH BARK BITING BY ANGELIQUE MIRASTY (6 Minutes)

Angelique Mirasty, a Cree Indian who lives on an island in Amisk Lake, may be the only person living that is biting birch bark in this unique way. Her designs are taken from nature, using bees, butterflies and flowers to form intricately exquisite patterns.

14. A WILLOW BASKET BY FLORINE HOTOMANI (11 Minutes)

Florine Hotomani is an Assiniboine Indian from the Kahkewistahaw Reserve. Florine makes baskets from a combination of green and mature willows. In the film, Florine weaves a special wall basket.

15. WOODEN FLOWERS OF NOVA SCOTIA BY MATILDA PAUL (14 Minutes)

Matilda Paul, a Micmac Indian has carried on the contemporary craft, of making wooden flowers. Using wood shavings from the poplar tree, life like flowers of exceptional colour and beauty are made. In this film Matilda makes daffodils.

16. IROQUOIAN POTTERY BY BILL PARKER (18 Minutes)

Bill Parker, who made his home at Golden Lake Reserve, is one of the few remaining craftsmen making pottery, using ancient Iroquoian methods and materials. For the film Bill makes a traditional water jug.

17. A SILVER CHALICE BY JEFF GABRIEL (10 Minutes)

Jeff Gabriel is a Mohawk of the Bear Clan. A silver-smith of great talent, he draws upon his Iroquoian background to create highly individual art pieces that are precious to collectors. In the film he makes a chalice of traditional design with his own special interpretation.

18. FORT ALBANY CARVER, LAWRENCE MARK (14 Minutes)

Lawrence Mark, a Cree Indian lives close to the shore of James Bay. Using driftwood Lawrence carves birds and animals of the wilderness. The film shows Lawrence carving an owl known in Cree as "Popanageso".

The North American Indian Arts and Crafts Film Series is supported by a comprehensive Teacher's Resource Guide. The program includes:

- eighteen booklets on the films
- maps and charts
- classroom activity sheets
- bibliography of books and films
- a listing of North American Indian Cultural Centers

The booklets on each of the eighteen films are provided for instructional use relative to broad curriculum objectives. An additional five booklets on North American Indian life and culture completes this unique resource material.

North American Indian Films Inc. 177 Nepean Street, Suite 201 OTTAWA, Ontario, Canada K2P OB4 Telephone: (613) 238-7713

Federal Business Development Bank

(FBDB)

Federal Business Development Bank

The Federal Business Development Bank (FBDB) is a Crown Corporation which promotes and assists in the establishment of small and medium sized businesses anywhere in Canada. In addition to offering a wide range of management training courses, the FBDB also provides other services:

FBDB Management Counselling (CASE)

The FBDB management counselling service known as CASE (Counselling Assistance to Small Enterprises) assists small businesses in Canada to improve their methods of doing business. This service is provided at a nominal fee and it supplements counselling services obtainable from the private sector. It makes available the experience of retired business persons as counsellors.

FBDB Management Training Seminars

To help improve management skills in small Canadian businesses, the FBDB conducts management training seminars, at a moderate registration fee, in cities and towns across Canada. These seminars are planned to meet the needs of owners and managers of small businesses. The following is a list of seminars which are offered:

	М	RE	TAILING
Е	TAXATION - AN INTRODUCTION	K	TIME MANAGEMENT (HALF DAY)
D	CHOOSING, LEADING AND MOTIVATING PERSONNEL	J	INCREASING YOUR PROFITS
С	PERSONNEL ADMINISTRATION- COST CONTROLS	Н	MARKETING - AN INTRODUCTION
В	HOW TO PREPARE A CASH FLOW FOR A SMALL BUSINESS	G	BOOKKEEPING - AN INTRODUCTION
A	FINANCIAL STATEMENTS - FORECASTING FOR EXPANSION	F	FINANCIAL ANALYSIS - TERM LOAN ANALYSIS

The bank also prepares special joint seminars in collaboration with industry associations and other organizations.

FBDB Information Services

The FBDB publishes booklets on a wide range of topics pertaining to the management of small business in Canada. These booklets, in the series entitled "Minding Your Own Business", are listed below:

- No. 1 Reference booklets for small business
- No. 2 Giving credit to your customers
- No. 3 Presenting your case for a term loan
- No. 4 Forecasting for an existing business
- No. 5 Managing your current assets
- No. 6 Forecasting for a new business
- No. 7 Managing your fixed assets
- No. 8 Managing your cash
- No. 9 Working Capital
- No.10 Changes of ownership
- No.11 Planning a motel
- No.12 Equity capital for small companies
- No.13 Paying your employees
- No.14 Personnel records
- No.15 Planning the start of your retail business
- No.16 Financing for your retail busines
- No.17 Retail pricing
- No.18 Managing your retail inventory
- No.19 Attracting and keeping your retail customers
- No.20 Buying a franchise
- No.21 Buying or Starting a Restaurant
- No.22 Controls for Your Restaurant

The FBDB also publishes a free quarterly news bulletin called "Small Business News" to help smaller Canadian firms keep in touch with business developments.

At its branch offices, operators of small businesses can obtain information about assistance programs for businesses available from the federal government and others and are directed to representatives of appropriate assistance programs. As well, the branch offices maintain reference libraries with a variety of publications on small business management which can be obtained free or at a low cost from their publishers.

FBDB Offices

The FBDB has a network of regional and branch offices across Canada. The Assistant General Manager of Management Services at each regional office can provide more information on the FBDB Management Services programs.

ATLANTIC REGIONAL OFFICE, Federal Business Development Bank, Suite 1400, Cogswell Tower, Scotia Square, HALIFAX, N.S. B3J 2Z7

QUEBEC REGIONAL OFFICE, Federal Business Development Bank, 800 Victoria Square, MONTREAL, Quebec H4Z 1C8

ONTARIO REGIONAL OFFICE, Federal Business Development Bank, 250 University Avenue, TORONTO, Ontario M5H 3E5

PRAIRIE AND NORTHERN REGIONAL OFFICE, Federal Business Development Bank, 161 Portage Avenue, WINNIPEG, Manitoba R3B 0Y4

BRITISH COLUMBIA AND YUKON REGIONAL OFFICE, Federal Business Development Bank, 900 West Hastings Street, VANCOUVER, B.C. V6C 1E7

Bookkeeping and Accounting Series BA-1

Bookkeeping and Accounting is an introductory course intended for owners, managers and bookkeepers who want to know what bookkeeping and accounting are all about. The objectives of the course are to provide basic knowledge of bookkeeping and accounting and to identify basic controls for the most important items in any small business. No previous knowledge of bookkeeping or accounting is needed.

The course is presented in a modular format. The course materials are modular texts which include: readings, problems, a glossary, and Leader's Notes.

The course outline is as follows:

Foreword Separate Module Containing:

- Course Outline and Table of Contents

Module 1 Definitions

- Bookkeeping
- The Accounting Cycle and the Financial Statements

Problems

Glossary of Terms

Module 2 The Recording Process

- The Double Entry System
- The Recording Process and the Journals vs "T" Problems

Module 3 The Ledgers and the Trial Balance

- The General Ledger
- The Subsidiary Ledger
- The Trial Balance

Problems

Module 4 The Worksheet

- The Worksheet
- The Adjusting Entries
- Example of a Worksheet and Adjusting Entries Problems

Module 5 The Financial Statements and the Closing Entry

- Financial statements
- The Closing Entry and the Post Closing Trial Balance Problems

Module 6 Example (of the Accounting Cycle)

- Recording Transactions
- Posting the Ledgers and Taking a Trail Balance
- The Worksheet
- The Financial Statements and the Closing Entry and the Post Closing Trial Balance

Summary

Module 7 Cash

- Cash Control
- Petty Cash
- Bank Reconciliation

Problems

Module 8 Accounts Receivable

- Controls of Accounts Receivable
- Collection of accounts Receivable
- Losses on Accounts Receivable

Problems

Module 9 Inventory

- Recording Inventory
- The Evaluation of Inventory
- Control of Inventory

Problems

Module 10 Salaries

- Employees Files
- Salaries and Deductions
- Payroll Control

Problems

Finance and Taxation Series (FT)

FT-1 Fundamentals of Financial Management (1978)

Fundamentals of Financial Management is an introductory level course intended for owners/managers of small businesses, especially those who are sensitive to the financial conditions of their operations, other managers and supervisors who want a better appreciation for financial statements and financial management and skill-proficient entrepreneurs who are starting a business. The course objectives are to provide the new business person with an understanding of basic financial statements and to develop the person's ability to make better financial management decisions.

The course materials include texts, case studies and leader's notes. The course outline is as follows:

- Module 1 The Income Statement
 - Components of the Income Statement and their usefulness
 - How to record transactions using the Double Entry Bookkeeping System

Case: George's Sporting Supplies(A)

- Module 2 The Balance Sheet
 - Explains Balance Sheet Income and the relationship to the Income Statement

Case: George's Sporting Supplies (B)

- Module 3 Working Capital
 - Shows how it is calculated and outlines the usefulness of working capital
 Case: T.C.L. Toys Ltd.

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- Module 4 Financial Analysis: Primary Ratios
 - Shows how to calculate the most important ratios and how they can be used in analysing financial statements
 Case: George's Sporting Supplies (C)
- Module 5 The Break-Even Point
 - Explains the components of the break-even and shows three methods to calculate it.

Case: Zappos

- Module 6 The Source and Application of Funds
 - Defines the Source and Application of Funds Statement and gives an example.

Case: Mary's Production Reg'd.

- Module 7 The Opening Balance Sheet
 - Reviews the Balance Sheet and explains what a Pro-Forma Balance Sheet is and why it should be prepared. Case: Hel N' Hank Reg'd.
- Module 8 The Pro-Forma Income Statement (Profit Forecast)
 Explains how to forecast for a new and an existing business.

 Case: Janet and Daughters (A)
- Module 9 The Pro-Forma Balance Sheet
 Explains the elements of the Pro-Forma Balance Sheet
 Case: Janet and Daughters (B)
- Module 10 The Cash Budget
 Explains how to prepare a cash budget and shows its use
 Case: XYZ Company

FT-2 Financial Decisions for Small Business (1979)

Financial Decisions for Small Business is an intermediate level course intended for owner/managers and key employees of any type or size of enterprise and people who are thinking about starting a business. The course objectives are to promote an understanding of effective financial management and to develop an analytical approach to financial planning (through case studies) as an aid to determining the profitability of projects and growth of operations.

The course materials include: case studies, readings and leader's notes. The course outline is as follows:

- Module 1 Introduction Sources and Use of Funds Case: Canada Cartage Company
- Module 2 Short-Term Cash Requirements
 Case: Simons Sportswear Ltd. (A & B)
- Module 3 Investment of Short-Terms Cash Surpluses Case: Confex Foods Limited (A)
- Module 4 Lease or Buy Decisions Case: Simons Sportswear Ltd. (C)
- Module 5 Term Loans
 Case: Confeed Supplements Company (A)
- Module 6 Long-Term Funding
 Case: Wogobo Resourt Limited
- Module 7 Investment Alternatives
 Case: Confeed Suuplements Company (B)
- Module 8 Investment Management
 Case: Confex Foods Limited (B)
- Module 9 Estate Planning
 Case: Fashion Arts Limited
- Module 10 Summary
 Case: Modern Teaching Company

FT-3 Credit and Collections (1968)

Credit and Collections is an intermediate level course intended for owners, managers and employees who handle or are being trained to handle credit granting or collection responsibilities and sales personnel in any retail, commerical or industrial enterprise. The course objectives are to provide a basic knowledge of the principles of consumer and mercantile credit and to examine the techniques of profitable credit investigation and approval.

The course materials include: texts, case studies, and leader's notes.

The course outline is as follows:

- Module 1 The General Concept of Credit
 - Origin and History of Credit
 - Why is Credit Used?
 - Types of Credit and Credit Instruments
 - Questions for Discussion Case: Patharb's Fashion Wear
- Module 2 Terms of Sale
 - Mercantile Credit Terms
 - Cash Discounts
 - Consumer Credit Terms

Cases: The Capital Paint Corp. Ltd.
The Towne Variety Store

- Module 3 Guiding Principles of Credit Analysis
 Cases: Sellers Department Store
 Production Fabricators Ltd.
- Module 4 How to Read a Financial Statement Case: The Capital Paint Corp. Ltd.
- Module 5 Services of Credit Associations and Other Major Financial Institutions
 Cases: The ABC Company Ltd.
 "Crowns" Variety Store
 Carl Del Grande
- Module 6 Mercantile Collections
 Cases: Collection "Stickers"
 White's Wholesale Hardware Ltd.
- Module 7 Consumer Collections
 Cases: Sellers Department Store
 The Case of Mr. H.T. Robinson

Module 8 Credit and Collection Correspondence

Quick Test No. 1 Quick Test No. 2 Quick Test No. 3

Module 9 Bad Debts

- Bankruptcy

Case: Jade Distributors Ltd.

Module 10 Collection Legislation

- Small Debts and County Courts
- Judgment and Writ of Execution
- Garnishment
- Statute of Limitations
- Conditional Sales Act
- Bulk Sales Act
- Mechanics Lien Act
- Warehouseman's Lien Act

Cases: The Capital Paint Corporation Ltd. Stone's Hardward Store

Module 11 Courts of Law

- Division Court
- County Court

Case: Coupland Milk Company

Module 12 Builders Credit

- Questions for Discussions

FT-4 Taxation (1975)

Taxation is an intermediate level course intended for those who wish to know more about Taxation. The course objectives are to explain and illustrate the main aspects of taxation and to discuss the advantages and disadvantages of incorporation.

The course materials include: text, case studies and leader's notes. The course outline is as follows:

- Module 1 Introduction to Taxation
 Introduces the course and the taxation vocabulary.
 Case: Driftwood Motel and Restaurant
- Module 2 Problems of Individuals
 Reviews in detail some key provisions of the Taxt Act.
 Case: Brian Cronan
- Module 3 Capital Gains Tax
 Explains the problems related to the Capital Gains Tax.
 Case: Doug Pometer
- Module 4 Problems of Partnerships
 Introduce the participants to the basic implications of the Act as it affects partnerships.

 Case: Carlyle, Bushwalk and Stewart
- Module 5 Problems of Farmers
 Concentrates on the special problems facing farmers under the new Act.
 Case: John Sherman, Beef Farmer
- Module 6 Problems of Corporations
 Concentrates on some of the key provisions of the
 Income Taxt Act as they affect small businesses operating
 as corporations.
 Case: Atlas Hotels Limited (A)
- Module 7 Problems of Corporations
 Focuses attention on the mechanics of calculating the new surplus accounts introduced in the Act.

 Case: Atlas Hotels Limted (B)
- Module 8 Federal Sales Tax
 Examines the impact of the Federal sales tax regulations on the operations of a wholesaler.

 Case: Kemble Wholesale Plumbers Limited

Module 9 Succession Duties and Estate Planning

- Emphasizes the value of planning for business continuity and minimization of succession duties.

Case: Fashion Arts Limited

Module 10 Re-Assessment and Review

- Explains what to do if you disagree with the Income Tax Assessment.

Case: William Nash

FT-5 Inventory Management (1977)

Inventory Management is an advanced course intended for administrators, purchasing agents, supervisors, managers, and owners, who handle or deal with inventory. The course objectives are to provide a basic knowledge of the principles of inventory management, to examine the different inventory management methods and techniques, and to complete an implementary plan.

The course materials include: texts, group exercises, bibliographies, case studies and leader's notes. The course outline is as follows:

- Module 1 Inventory: Definition and Role Within the Firm
 - Components of inventory
 - Why set up inventory?
 - Classifying inventory
 - Two types of manufacturing

Exercise: Inventory Questionnaire

- Module 2 The Costs Associated with Inventory Management
 - Analysis of inventory costs
 - Costs of acquisition, possession and loss
 - Costs of too high or too low an inventory level Case: Peter's Soft Drinks Inc.
- Module 3 Planning and Forecasting Needs
 - stages of planning
 - Information for planning
 - Specific stituations Case: Superior Textiles
- Module 4 Purchases and Supplies
 - Purchase and inventory management
 - Managing purchases and supplies

Case: Richardson Machine Shop (1976)

- Module 5 The Interrelationship Between Financial Planning, Inventory Control, Sales Forecasts, and Production Requirements
 - Sales forecasts
 - Budgetary control
 - Production planning

Case: Payette Enterprises Inc.

- Module 6 Physical Inventory Management
 - Storage functions, types and locations
 - Warehouse organization
 - Handling stored goods and returns

Exercise: Bel-Val Co. Case: Eclair Industries

Module 7 Methods of Inventory Management - I

- 4 methods

- The ABC method for planning and control

Case: Today's Kitchen Inc.

Module 8 Methods of Inventory Management - II

- Turnover and storage time

- Costs per order and other inventory costs

- Economic order quantity

Module 9 Methods of Inventory Management - III

- Reorder points

- Computer applications

- Visual control and card-index system

Case: Whitelander Ltd.

Module 10 Inventory Management System

- The what and why's of an inventory management system

- A model of a system

- Using a system of inventory management Exercise: Inventory System Questionnaire

General Business Series (G)

G-1 How to Start a Small Business (1978)

How to Start a Small Business is an introductory course intended for anyone who is interested in starting a small business and for people who have just recently started one. The course objectives are to outline the main considerations for success in a small business and to describe ways of better insuring that success.

The course materials include: texts, glossaries, readings, exercises, case studies, leader's notes and optional video-cassettes (see separate description). The course outline is as follows:

Foreword Separate Module Containing:

- Foreword and Table of Contents
- Reading on "How to Analyse a Case Study"
- Module 1 So You Want to Start Your Own Business...
 - The nature of small business, reasons for starting, pros and cons, and the importance of the business plan.
 - Project Exercise: Self-Survey Case: Toba Supplies Company
- Module 2 Does Government Help or Hinder?
 - Forms of business organization and factors to consider.
 - Project: Government Regulation Checklist Case: Peterson Building Supplies Co.
- Module 3 Do You Have to Start From Scratch?
 - Starting on Your Own Vs. Buying Vs. Frachising
 - Project: Business Investigation Checklist

Case: Joan Simpkins

- Module 4 Finding Your Niche in the Market
 - Investigating the Market to See if the Business is Viable
 - Promoting the New Business and the Marketing Plan
 - Project: Marketing Checklist

Case: Thermo Wash

- Module 5 Why Financial Statements
 - Preparing the Balance Sheet and Profit and Loss Statements
 - Using Financial Statements
 - Project: Accounting System Checklit

Case: The Alfred Supply Company

- Module 6 Financial Analysis
 - Budgets, Forecasts (Pro-Forma Statements), Break-Even Analysis and Cash Flow
 - Project: Financial Planning Checklist

Case: Simo Company

Module 7 Financial Planning

- Determining Financial Requirements, Sources of Finance, and Working Capital
- Projects: Financial Planning Worksheet

Case: Bronda Registered

Module 8 Purchasing and Inventory Control

- What Goods to Carry, Where to Get Them, and Controlling the Goods
- project: Merchandise Handling Checklist Case: Boutique El Toro

Module 9 Managing Your Staff for Good Results

- Organization Structure, Payroll, Hiring and Recordkeeping
- Project: Key Considerations in Setting up a Personnel System

Case: Martinville Bakery Inc.

Module 10 So Now You Can Start Your Business

- Course Review Checklist covering all the main topics in Modules 1 through 9

Case: The Madsen's Dilemma (A Comprehensive Case Study)

G-1 How to Start a Small Business Classroom Video-Cassette Series (1978)

This series of 10 video-cassettes is designed to support the written series by providing information and experiences from owner/managers and professionals from the small business sector.

Using an interview technique, some twenty business people relate their experiences and problems in each of the ten topic areas dealt with in the course. It is an ideal way to translate the theory of the written course into reality as seen by small business owner/managers.

Module 1 So You Want to Start Your Own Business. - (11 minutes)

An overview of the series. On-site commentaries from owners who outline their reasons for starting a small business, the way they got started and some of the problems they encountered.

Moduel 2 Does Government Help or Hinder?
- (13:06 minutes)

A lawyer who specializes in small business looks at the advantages and risks of each form of business, as well as the costs and procedures involved. His comments are backed up by testimonials from a few owner/managers.

Module 3 Do You Have to Start From Scratch?
- (10:50 minutes)

An example of each way of getting into business is shown with comments by the owner and a C.A. These owners' observations are sure to make a person consider these 3 alternatives more carefully.

Module 4 Finding Your Niche in the Market - (19:25 minutes)

With the help of two marketing consultants and three owner/managers, the program explores the sources of information available (often at no cost) to zero in on the marketplace. The owner/managers also talk about the usefulness of advertising in attaining their objectives.

Module 5 Why Financial Statements?
- (14:22 minutes)

This program looks at the importance of bookkeeping, profit and loss statements, balance sheets and business ratios. With the help of a chartered accountant, representatives of Dunn & Bradstreet, FBDB and The Royal Bank, the viewer will get an overview that, as one of the owner/manager's explains, gives you "a good barometer to gauge whether or not you are making or losing money".

Module 6 Financial Analysis (21:06 minutes)

This program looks at the importance of determining objectives, establishing short and long-term goals and preparing budgets and cash forecasts. The importance of forecasting is highlighted by small business owners, an accountant and a banker.

Module 7 How Much Money Do I Need and Where Do I Get It?
- (18:40 minutes)

With the help of an accountant and four businessmen, the viewer will get an appreciation of the money needed to get a business off the ground. Representatives from the Royal Bank, FBDB, the Department of Industry, Trade and Commerce and an accountant plot the search for that all important dollar.

Module 8 Purchasing and Inventory - What To Buy and How To Control It - (15:10 minutes)

Four purchasing methods are explained, followed by an accountant and businessmen who highlight the importance of choosing a good supplier and the importance of control. Anecdotes on resonsibility and theft are given and insurance is explained by a broker.

Module 9 Managing Your Staff For Good Results - (19:30 minutes)

The selection of staff is explained by drawing on the experience of personnel consultants, owner/managers, an insurance representative and Revenue Canada. The program looks at the selection process, payroll set-up and administration, employee benefits, motivation of staff and employee training.

Module 10 So Now You Can Start Your Own Buiness - (13:15 minutes)

A capsule review of the important questions to considered <u>before</u> starting. All subjects are touched on with interesting anecdotes and observations from consultants, lawyers, accountants, lenders and many small business owner/managers. The program ends by providing a good impression of how owning a small business radically changes one's personal life.

G-1 How To Start a Small Business Broadcast TV Series (1979)

This series of 10 half hour TV shows is designed to support the written course material. It is intended for home viewing on broadcast (or cable) TV, to be followed later that week by a classroom presentation of the same module.

Hosted by Percy Sletzman and using three professional actors, the main topics in each module are highlighted through a series of skits. The result is a program that is not only humourous and entertaining but also educational.

Module 1 So You Want To Start Your Own Business.

This show highlights the reasons for starting your own business and acts out a case study of someone actually making this decision followed by a discussion on the elements of a business plan. The host concludes that "this is just a beginning, but an important first step".

Module 2 Does Government Help or Hinder?

This show considers different attitudes about government regulations and looks at gathering the information. The three different forms of business organization are explored by having each actor select a business and deciding which form is most suited.

Module 3 Do You Have to Start From Scratch?

After reviewing the main points of the first two shows, the three main routes into one's own business are explored by having each actor pick their "dream" business and develop it. In one case, two available businesses are investigated and it is decided to start from scratch. In another case, the actors find a business that appears worthwhile and determine the information required before making an offer. Finally, we see a meeting of one of the actors with the representatives of "Frank's Red Hot Puppies Franchises" and we get his reaction to this approach to getting into business.

Module 4 Finding Your Niche in the Market

After considering the importance of salesmanship, the host points out that there is more than this involved. In one situation we see a prospective owner investigating a business and learn the sources of information to define a market. In the next situation, we see an amusing market study, and finally, we see an owner realizing that she has not been in touch with her market and beginning to realign her plans to improve this. Host concludes by pointing out the importance of knowing your customer.

Module 5 Why Financial Statements

Illustrated by a business that is not really making any money, the importance of finding out actual financial position is highlighted. We then move on to a situation in which an owner/manager is not aware of how much money he is losing because of his lack of good statements. The host summarizes the two basic statements so that in the next situation we can see an owner who does some analysis and gains new insights into her business.

Module 6 Financial Analysis

This show opens with three different points of view on what controlling a business is all about. Host sums up and we then tune in on a business in trouble. A "Wizard" shows up to show how forecasts and financial planning can solve their problems. They settle down to working out the details of a budget and a cash forecast, and the show concludes with a demonstration of the usefulness of a "moveable break-even chart".

Module 7 Financial Planning

After highlighting the need for planning, we see a business owner and her store manager establishing their needs for a new branch operation followed by an interview with the bank manager to arrange a loan. The next situation shows an inventor who has done no financial planning and we learn what a financial plan consists of and what sources of financing might be available.

Module 8 What To Buy and How to Control It

After introducing basic ideas on inventory control, we see a store owner, his wife and their manager trying to find ways to avoid the annual inventory count. After some amusing confusion, they come to understand the need for the inventory count and then discuss their overall inventory control system. In a different situation, we see an owner with her store manager discussing their opening inventory and its costs. This is followed by a meeting with a supplier in an incident that highlights the importance of knowing your requirements and knowing how to deal with suppliers effectively.

Module 9 Managing Your Staff For Good Results

In this show, we see a prospective job applicant meeting two different businesses. One is run in an autocratic way, the other in a "family style". We see the pros and cons of each style at the same time that we see the hiring process underway. Viewers are left to come to their own conclusions.

Module 10 So Now You Can Start Your Business

This show summarizes the previous nine and wraps up the series. In it, we see the three actors and the host viewing excerpts of the previous nine shows and providing their comments on what they, as non-business people, have learned from the experience. As a wrap-up and review, the show highlights the main themes of each module and closes the series in a relaxed and informal way.

G-2 Exporting (1976)

Exporting is an intermediate level course intended for owners and managers of firms with exportable goods and services, their sales representatives, supervisors and staff. This course is of particular interest to those preparing to enter the export trade. Generally, participants should have some knowledge of the mechanics of exporting. The course objectives are: to familiarize participants with the basic techniques and procedures involved in export marketing, to compare these techniques and procedures with those used in domestic marketing, and to develop an appreciation for the export market as an appreciation for the export market as a source of new business opportunities.

The course materials include: case studies, reading notes and leader's notes. The course outline is as follows:

- Module 1 Analysing Export Marketing Opportunities
 - What is Export Marketing?
 - Know Your Foreign Markets
 - Forecast Your Foreign Business Opportunity Case: Tubular Furniture Ltd. (A)
- Module 2 Organizing for Export Sales
 - How to Select Export Markets
 - Organizing Direct Foreign Sales
 - Exporting Through Agents

Case: Tubular Furniture Ltds. (B)

- Module 3 Financing Exports
 - What Criteria Are Used in Granting Credit
 - How to Handle Credit to Foreign Customers Case: Evenflo Manufacturing Ltd.

Module 4 Pricing Exports

- Determine Your Prices for Export Sales
- Calculate Your Export Costs
- How to Quote on Export Business
- How to Control your Export Sales

Case: M.L. Food Products Ltd.

- Module 5 Appointing a Manufacturer's Agent In Japan
 - Select Your agent
 - What Kind of Agreement Should You Negotiate With Your Agent

Case: Pacific Chain Saw Ltd.

Module 6 Exporting to the European Economic Community
- Advantages and Disadvantages of Exporting
- Will Your Product be Accepted by Foreign Customers?
- Is Your Company Eligible for Government Assistance?
Case: Canadian Waste Disposal Systems Ltd.

Module 7 Exporting to the People's Republic of China - How to Promote Export Sales
Case: Precision Metrology Ltd.

Module 8 Developing an Overseas Distribute Strategy
- Select Your Distribution Channel
- Plan Your Distribution Channel
Case: National Fixtures 1td.

Module 9 Grouping For Export
- Pros and Cons of Forming an Export Group
- Who Should be Members of the Group
Case: Manitoba Apparel Export Group (Mapex Group)

Module 10 Establishing an Overseas Operation
- Licensing Arrangements
- Joint Ventures
Case: Spartan Manufacturing Ltd.

Module 11 Design for Export Marketing

- What is the Relationship Between Industrial Design and Marketing

Case: Sanitation - Picker

G-3 Purchasing (1973)

Purchasing is an intermediate level course intended for owners, managers and all staff with purchasing responsibilities in any type of manufacturing or distribution business. The course objective is to understand certain fundamental principles in purchasing which help avoid costly errors and build a more profitable operation.

The course materials include: case studies, reading notes and leader's notes. The course outline is as follows:

- Module 1 Purchasing and Profits
 - Impact of Purchasing on Profits
 - Organize Your Purchasing Department
 - How to Manage the Purchasing Function Cases: Specialty Steel Fabricators Ltd.
- Module 2 Setting Purchasing Specifications
 - How to Classify Your Purchases
 - Select Your Specification System

Cases: Novelty Manufacturing Company L.C. Variety Store

- Module 3 How Much to Purchase?
 - Forecast Your Requirements
 - Determine Your Inventory
 - Plan Your Purchasing in Relation to Anticipated Demand

Cases: X.Y.Z. Company
B.J. Hardware Store

- Module 4 Basic Inventory Control and Purchasing
 - How to Determine Your Safety Stock
 - How to Reorder

Cases: Easy Open Door Company Cozy Corner Variety Store

- Module 5 Selecting Suppliers
 - Know Your Sources of Supply
 - Evaluate Your Suppliers
 - Select Your Suppliers

Cases: Eldora Structural Glass
Bill bader Sporting Goods

- Module 6 Determining Prices
 - Profitability and Purchasing
 - How to Negotiate Prices

Cases: Argus Sporting Goods Light in Your Life Module 7 Other Costs in Purchasing

- How to Handle External Costs (Transportation, In-Transit Insurance, Taxes, etc.)

- Reduce Your Internal Costs by Control

- Did You Get What You Ordered?

Cases: Adams Toy Company R & S Variety Store

Module 8 Purchasing Procedures

- Establish Your Own Procedures

- Purchasing Requisitions and Orders

- Receiving and Inventory Procedures

- Control Your suppliers' Performance

Cases: Special Paper Products Company

Joe's Corner Store

Module 9 Value Analysis

- What is Value Analysis?

- How to Analyse Value of Products

- How to Implement Value Analysis

Cases: All Warm Furnace Company
Bob and Ann Peters Boutique

Module 10 Purchasing Outside Canada

- How to Select Foreign Suppliers

- Importers and representatives Can Save You Money

- Sources of Assistance

Cases: Scientronics Limited

Martin and Stoner Clothing and accessories

Module 11 "Make" vs "Buy"

- Could You Make Your Own Goods?

- Will it be Profitable?

Cases: High Voltage Transformer Co.

Knowles Camera Store

Module 12 Evaluation Purchasing Effectiveness

- The Management Process in Purchasing

Cases: Easy Rocking Chair Company Good Earth Discount Store

G-4 Data Processing in a Small Business (1978)

Data Processing in a Small Business is an intermediate level course intended for owners, managers and others interested in the use of data processing in small and medium sized businesses. Some basic knowledge of terminology is recommended. The course objectives are: to enable business persons to better understand the information needs of their firm and to help them determine how to obtain this information as easily and inexpensively as possible.

The course materials include texts, case studies, exercises and leader's notes. The course outline is as follows:

Module 1 Data Processing - An Overview

- What is Data Processing?
- Do You Need a Data Processing System?
- What System is Required?

Cases: Car Dealer

Building Contractor

Module 2 System Definition - Procedure

- The Payroll system
- The Finance system
- The Inventory Control System
- The Production Control System

Exercises: System Specifications

Module 3 System - Definition - Case 1

- No text

Case: How to Set Up an Efficient System

Module 4 System Definition - Case 2

- No text

Case: Setting Up Your Own System

- Module 5 Selecting the Right Kind of Data Processing Resources
 - Manual Data Processing Procedures
 - Accounting Machines
 - Data Centers
 - Mini Computers

Case: Building Contractor

- Module 6 Acquisition of Data Processing Resources
 - What Should Your Request for Tenders Specify
 - How to Evaluate Tenders
 - Selection of Supplier

Exercise: Selecting a System Proposal

Module 7 Technical Aspects of System Development

- Conception of a System
- How to Control Your System
Exercise: Developing a System

Module 8 Implementation of Data Processing Systems

- Strategies for Implementation - You Have to Plan to Succeed Exercise: Implementation Schedule

Module 9 Operation of Data Processing Systems

- Define Your Needs

- Organize Your Structure

- Control Your System

Exercise: Defining Forms and Controls

Module 10 Special Needs

- How to Adapt Data Processing to Your Needs

Case: Introducing a New Product

G-5 Business Law (1968)

Business Law is an intermediate level course intended for owners, managers, office managers and key employees who have or seek management or supervisory responsibility as well as anyone who is thinking about starting a business. The course objectives are: to learn to recongize and deal more effectively with the legal aspects of business and to improve communications with lawyers and to be able to understand and apply their advice.

The course materials include: readings, case studies and leader's notes. The course outline is as follows:

- Module 1 Formation of a Contract
 - What is a Contract?
 - Do You Always Need A Written Contract?
 - Can You Enforce a Contract?

Case: Lyons and Smith Furniture Company

- Moduel 2 Discharge of a Contract
 - What do You do if Your Contract is Breached? Case: Martin and Fleming Manufacturing Ltd.
- Module 3 Liability of an Employer for Acts of Employees Insurance Contracts
 - You are Responsible for Your Employees
 - How to Read and Negotiate an Insurance Contract Case: Metro Drive-In Movie
- Module 4 Sale of Goods
 - Change of Ownership
 - Guarantees

Case: Allison Wholesale Electric Limited

- Module 5 Conditional Sales, Chattel Mortgage and Bailment
 - What is the Use of Conditional Sales Agreements?
 - How to handle a Chattel Mortgage
 - What is a Bailment? Case: William Martin
- Module 6 Employer Employee Relations
 - Legislation Protects Your Employees
 - Use of Employment Contracts

Case: Maxwell Dry Cleaning Limited

- Module 7 Creditor's Rights and Negotiable Instruments
 - Your Rights as a Creditor
 - How to Proceed for Collection
 - Some Useful Procedures

Case: Twilight Electrical Service

Module 8 Partnerships

- What is Your Responsibility in a Partnership Agreement?

- What is a Good Partnership Agreement?

Case: Abel Leather Goods

Module 9 Corporations

- What is a Corporation?

- Pros and Cons of Incorporating the Business

Case: Abel and Chambers Leather Goods

Module 10 Leases

- What is a Lease?

- How to Negotiate a Lease

Case: Selright Variety Stores Limited

Module 11 Bankruptcy

- You and the Bankruptcy Act

- What Happens in a Bankruptcy?

Case: John Warner - Electrical Appliances

Module 12 Mechanics' Liens

- The Mechanics' Lien Act

Case: Edison Electrical Contractors

Module 13 Patents, Trade Marks and Unfair Competition

- What is the Use of Patents?

- What is a Trade Mark?

- Copyrights Will Protect You

- The Combines Act

Case: Harry Claus Novelties

G-6 Business Law (1979) Ontario Version

Business Law is an intermediate level course intended for owners, managers, office managers and key employees who have or seek management or supervisory responsibilities as well as people who are thinking about starting a business. The course objectives are: to provide a better understanding of the laws involved in doing business, to help participants plan and organize their business within the framework provided by law, and to improve communications and understanding with lawyers.

The course materials include: texts, bibliographies, case studies and leader's notes. The course outline is as follows:

- Module 1 Introduction
 - What is a Law
 - Who Makes Laws?
 - Who Handles Laws?

Case: Bernard's Baby Furniture Ltd.

- Module 2 Fundamentals of a Contract
 - What is a Contract?
 - Who is Able to Make a Contract? Case: Lyons and Smith Furniture Co.
- Module 3 Interpretation and Discharge of Contract
 - Who is Bound by a Contract?
 - Is it Possible to Cancel a Contract?

Case: Wilson and King Paving Contractors Ltd.

- Module 4 Contractual Remedies
 - Is the Contract Completed?
 - Are There Any Breaches of the Contract? Case: Wholesale Manufacturing Co. Ltd.
- Module 5 Corporate Legal structure Sole Proprietorship and partnership
 - Going it Alone or Sharing Your Business Pros and Cons, Legal Implications Case: Wilson's Fruit Farm
- Module 6 The Business Corporation
 - What is a Limited Company?
 - Different Types of Incorporation
 - Rights and Duties of Shareholders Case: Meadowdale Fruit Farm Ltd.
- Module 7 Bailment
 - A Simple Definition
 - Bailee's Rights and Liabilities
 - Bailor's Responsibilities

Case: Sam Spade and Bavarian Brewery Ltd.

Module 8 Consumer Protection

- What Does Selling Mean?

- Know Your Customers' Rights

- Is Your Pricing Legal?

Case: Anson Wholesale Electric

Module 9 Consumer Protection

- Does Your Packaging and Labelling Comply With the Law?

- Don't Fool customers With Publicity

Case: Dyanamic Ltd.

Module 10 Consumer Protection

- Industry Legislation

- Safety Criteria

- How to Sell Legally

Case: Campbell Automotive Distributing

Module 11 Transportation

- Make Sure the Conditions are Clearly Spelled Out

- When is the Product Yours? Case: Canlit Wholesale Ltd.

Module 12 Building/Equipment (Safety)

- A Legal Overview of Your Installations Case: Glass and Plastic Manufacturing Ltd.

Module 13 Agency

- What is an Agent?

- Duties and Authorities of the Agent

Case: Diane Watt and Household Electric Ltd.

Module 14 Environmental Protection and Human Resources

- You are Committed to Your Environment

- Your Employees Have Rights Case: Henderson Fashions 1td.

Module 15 Legal Implications and Pitfalls of Franchising

- What You Should Know About Franchises

Cases: The Baker's Oven

Module 16 Insurance

- What Kind of Insurance Protection Do You Need?

Case: Haliburton Leisure Lodge

Module 17 Bankruptcy, Receivorship and Liquidation

- What Happens When You Run Into Bankruptcy?

- What Can You do If You are a Creditor?

Case: Osborn Carpets Ltd.

- Module 18 Taxation and Accounting
 - How to Handle Taxes
 - Your Accounting System A Legal Tool Case: Jack and Jill MacDonald
- Module 19 Security
 - Protecting Your Funds

Case: Michelle Roy and John Manley's Motors

- Module 20 Industrial Property and Negotiable Instruments
 - Protection provided by patents, trademarks, industrial designs and copyrights
 - Use of Negotiable Instruments as Covered by the Bills of Exchange Act (Bills of Exchange, Promisory Notes, Consumer Bills and Cheques)

Hospitality/Tourism Series HT

HT-1 Marketing for the Hospitality Industry (1967)

Marketing for the Hospitality Industry is an introductory level course intended for owners or managers of small and medium sized hotels/motels and people who are starting a hotel/motel business. The objective of the course is to familiarize participants with the basic principles of marketing as they apply to the Hotel/Motel Industry. This is an older course of acceptable quality but subject to revision.

The course materials include: case studies, student reading notes and leader's notes. The course outline is as follows:

- Module 1 Analysing the Marketing Problem
 Introduction to the Marketing Concept
 Case: Competition Means Change
- Module 2 Sales Planning
 Discussion of Seven Basic Sales Planning Steps
 Case: The Competitive Squeeze
- Module 3 Equipping to Sell and Service
 Establishing a "Sales Department" and Making the Property "Saleable"

 Cases: Preparing to Sell

 A Look in the Mirror
- Module 4 Direct Mail as a Marketing Tool
 Types of Direct Mail, Design of Direct Mail Pieces,
 Budgeting and Cost Consideration, Copy, and Preparing
 a Direct Mail Program
 Supplementary Readings
 Case: Building a Direct Mail Program
- Module 5 Advertising as a Marketing Tool
 Advertising Fundamentals and Review of Various
 Advertising Vehicles
 Case: Putting Your Message Across
- Module 6 Supplementary Marketing Aids
 Personal Selling, Telephone Selling, Public Relations,
 Publicity, Outside Agencies and Specialized Advertising
 Supplementary Reading: Showcase for a City
 Case: Promoting a New Facility
- Module 7 Promoting Individual Room Business
 Sources for Room Business, Merchandising, and
 Front Office Selling
 Case: Creating a New Image

Module 8 Promoting Convention and Group Business

- Types of Conventions, Soliciting Convention Business, Convention Planning and Servicing, Post-Convention Procedures, Commercial exhibits and Specialized Groups

- Supplementary readings

Case: Cetting Your Share of the "Wholesale" Market

Module 9 Promoting Food and Beverage Sales

- Promotional Opportunities, Individual Food Sales, Promotion Campaigns and Special Promotion

- Supplementary Reading

Case: "A Jug of Wine, A Loaf of Bread..."

Module 10 All Management Decisions Should Relate to Marketing

- The Importance of Implementing Marketing on a Systems Basis
- Recommended Readings

Case: An "Average Day" at the Center City Motor Hotel

HT-2 Financial Practises for Your Tourist Operation (1980)

Financial Practises for Your Tourist Operation is an introductory level course intended for owners, managers and key employees in existing or proposed tourist businesses. The objective of the course is to introduce the basic concepts of accounting and finance for smaller businesses in the tourist industry.

The course materials include: participant modules, case studies, exercises and Leader's Quides. The course outline is as follows:

Foreword Separate module containing:

- Introduction
- Course Outline and Table of Contents

Module 1 Basic Bookkeeping

- Definition and Benefits of Bookkeeping
- An Overview of Bookkeeping Mechanics
- The Uniform System of Accounts
- General Characteristics of a Good Bookkeeping System

Case: Sunset Motel

Module 2 Financial Statements

- Definition of Financial Reporting
- The Balance Sheet and the Income Statement
- Reading Financial Statements

Case: Beach Lodge, Frontier Resort

Module 3 Budgeting

- Definition of Budgeting and its Benefits
- How to Prepare a Budget
- The Cash Flow Budget

Case: Towne Motel - Cash Planning

Module 4 Operating Statistics and Breakeven Analysis

- Operational Analysis and its Benefits
- Standard Operating Statistics in the Tourism Industry
- Calculating the Breakeven

Case: Towne Motel - Breakeven

Module 5 Setting Room Prices and Other Prices

- Pricing Methods Available to Tourist Operators
- How to determine Your Room Rate The Preferred Approach
- Cost Based Pricing An Example
- Setting Other Prices

Case: Timber Trail Lodge

Module 6 Control System

- Definition, Objectives and Characteristics

- Controlling Cash, Inventory, Fixed Assets, General

- Evaluate Your System of Internal Control

Case: Dew-Drop Inn

Module 7 Financing Requirements

- Determining Financial Requirements

- Leverage and Sources of Financing

- How to Obtain Financing

Case: New Motel

Module 8 Taxation

- Taxation and the Type of Taxpayer

- Taxation and the Type Income

- The Impact of Tax When Buying a Property

Tax Exercise

Module 9 A Case for a Course Summary (Part A)

- Determining Market Value

- Determining the Fair Market Value of a Business - An Example

A Case for a Course Summary - Part A - Mountain Motor Inn

Module 10 A Case for a Course Summary (Part B)

- Financial and Operational Analysis - Mountain Motor Inn

- Setting the Price - Mountain Motor Inn

- Budget and Cash Flow Forecast - Mountain Motor Inn

- Course Evaluation

Management Series (MT)

MT-1 The Management Process (1977)

The Management Process is an introductory level course intended for those who are interested in studying management, particularly owners and managers and those who work in small businesses or would like to. The objective of the course is to introduce the basic principles and techniques of management. Emphasis is on the systems approach (planning, organization, directing and controlling).

The course materials include: student text, case studies, exercises, readings, bibliography and leader's notes. The course outline is as follows:

- Module 1 Introduction to the Management Process
 The Systems Concept and the Management Process
 Case: Bobois Company Inc.
- Module 2 The Evolution of Thought in Management
 General Concepts of the Development of Management Theory
 Case: The Couture Workshops Inc.
- Module 3 Decision-Making
 The Process of Problem-Solving
 Exercises
- Module 5 Planning Defintion, the Planning Process and Techniques Case: The Nautica Inc.
- Module 6 Organization
 The Organization Process and System
 Case: The Trenco Co. Inc.
- Module 7 Management and Motivation
 The Management Function and Theories on Motivation
 Case: Alco Company Inc.
- Module 8 Control
 Defintion, Theory, Process and Types of Control
 Analysis of Two Cases

Module 9 Strategy Formulation

- Relationship Between Firm and Environment, Goals and Objectives

Case: J.A. Halle

Module 10 Start-Up and Growth Problems

- Analysis of Strengths and Weaknesses, Stages of Growth and Obstacles

Exercises

MT-2 Organizational Behaviour (1977)

Organizational Behaviour is an intermediate level course intended for administrators, supervisors and managers in any organization, with special emphasis on small business owners and managers. The course objectives are to improve the understanding of human problems in the working environment and to help participants become more efficient managers of human resources.

The course materials include: student texts, cases, incidents and/or group exercises, references and leader's notes. The course outline is as follows:

- Module 1 The Human Problems of Small and Medium Enterprises
 Introduction to course and topics covered
 Case: The Problems of a Leader of a Firm
- Module 2 Similarities and Individual Differences: personality Properties of personality and the development of similarities and differences

 Case: George Smith
- Module 3 Perception and Communication
 Description of these processes and the factors
 which influence them
 Case: The Ideal Leader
- Module 4 Theories of Motivation
 Needs (Maslow), Theories X and Y, achievement motivation, expectations and dissonance theories
 A model of motivation
 Case: Gerald Martin Jr.
- Module 5 The Process of Influence, Authority Power and Leadership Formal and informal authority, sources of power, process and styles of leadership (managerial grid) Case: Who is the Boss?
- Module 6 Group Behaviour
 Group concepts, types of groups, group activities and groups functioning
 Case: Delegation to the Task Group
- Module 7 Satisfaction and Performance
 Company objectives, group objectives and individual objectives and how they interact
 Case: The Objectives of the Manager

Module 8 Organizational Conflict

- Nature and types, sources of conflict and managing conflict

Case: Western Desk Company

Module 9 Organization Change

- The nature of change, the process and managing change (organization development)

Case: The Manager and Change

Module 10 The Behavioural Sciences in Organizations

- The influences of environment, groups, personality, etc. and how they interact in the organizational setting

- The manager's characteristics in this context

Case: Zappa Construction Ltd.

MT-3 Communication and Interpersonal Relations (1977)

Communication and Interpersonal Relations is an intermediate level course intended for administrator's supervisors and managers in any organization, with special emphasis on small business owners and managers. The objective of the course is to increase administrators' and managers' interpersonal competence by means of improved communications skills.

The course materials include: texts, simulations and group exercises, references and leader's notes. The course outline is as follows:

Module 1 Introduction

- Course Outline and Introduction to the Experiential Approach

Exercises: Mutual Introduction

The Experiential Approach

Module 2 Verbal and Non-Verbal Communication

- An Overview of the Communication Process

Exercises: One Way - Two Way

Reformulation (Listening)

Module 3 Participation

- Definition, Dimensions, and Conditions Which Encourage

and Inhibit Participation

Exercise: Participation Role Play

Module 4 Leadership Training

- Leadership Qualities, Influences and Styles

Exercises: Personal Analysis of Leadership Styles

What is an Effective Leader?

Module 5 Task Group Problem-Solving

- Factors That Promote Effective Task Groups

- A Problem-Solving Technique

Exercises: A Common Exercise (Group Network)

Board of Directors (Problem-Solving)

Module 6 Group Relationships and Conflicts

- Types, Causes, Effects, and the Resolution of Conflicts

Exercises: Identifying Sources of Group Tension

Conflicts Among Groups

Module 7 Creativity and Brainstorming

- General Concepts, Stages and Choosing a Solution

Exercises: Creativity

Traffic Study

Module 8 Negotiation - Role Play
- Stages and Strategies
Exercise: Negotiation Case/Role Play

Module 9 The Individual
- Review of Maslow's and McClelland's Theories
Exercises: Determining Evaluation Criteria
Perception of Work

Module 10 Increasing Interpersonal Expertise
- Motivation, Power, Leadership and Interpersonal Competence
Exercise: Increasing the Leader's Competence

MT-5 The Social Responsibility of Business (1977)

The Social Responsibility of Business is an advanced level course intended for administrators, supervisors and managers in any organization, with special emphasis on small and medium sized business owners and managers. The objective of the course is to help owners and managers of small and medium sized firms understand that business is part of a social process and that entrepreneurial action must be viewed in relation to a given context, with all the constraints, demands, opportunities and threats that this context may present.

The course materials include: texts, recommended readings, case studies and leader's notes. The course outline is as follows:

- Module 1 The Concept of Social Responsibility
 Definition, relation to the firm's mission, objectives and profitability
 Case: Luxor Travel Agency
- Module 2 Social Responsibility: Areas of Involvement, Strengths and Weaknesses
 - Social responsibility applied to small and medium sized businesses, identifying strengths and weaknesses in relation to fulfilling social responsibilities

 Exercises: Diagnostic of One's Own Organization
- Module 3 Philanthropic Contributions
 Importance and types, their target populations and the need for a clear and flexible policy
 Case: Otto Pitt Inc.
- Module 4 Employee Working Conditions
 Importance of human resources, their complexities, and the type of working conditions needed to survive and prosper

 Case: Otto Pitt Inc. Parts 2 and 3
- Module 5 Employee Safety and Health
 Costs of work accidents and illness, the responsibilities of government, employees and employers and the challenge employee health and safety imposes on the small and medium sized firm
 Case: Premont Works Ltd.
- Module 6 Women at Work
 Review of the problems, trends of present legislation on employment and the impact of these factors
 Exercises

Exercises

Module 7 Consumer Protection

- Review of provincial and federal legislation, the small and medium sized firm's strengths and weaknesses and a review of the elements of a consumer protection policy. Exercises

Module 8 Protection of the Environment

- Review of the problems of environmental protection, the need to reduce pollution, what the firm's role should be and what social pressures may be exerted.

Case: Tila Dairy Ltd.

Exercises

Module 9 Ethics

- The need for a code of ethics governing the firm's behaviour in society and the relationships to its social responsibility policies.

Case: Metallurge Inc.

Exercises

Module 10 Defining and Implementing Social Responsibility Policies in the Small and Medium Sized Firm

- The importance of setting policies, the difficulties and the tools to use.

Exercises

MT-6 Business Policy (1977)

Business Policy is an advanced level course intended for administrators and managers of small and medium sized firms who already possess a good understanding of business operations and management. The objective of the course is to increase the analytical and policy decision making skills of business managers and administrators.

The course materials include: texts, case studies, complementary reading references, and leader's notes. The course outline is as follows:

- Module 1 Strategy A Conceptual Analysis Model
 Introduction to strategic planning with definitions of key terms and development of a model
 Case: Iaboratory of L.D.P. wood Products
- Module 2 Identification of Ojbectives
 Definition and need for objectives, how they are formulated and errors to avoid
 Case: The Robbins and Hobart Merger
- Module 3 Analysis of Internal Resources
 Review of the firm's internal resources with a view to formulating a competitive advantage
 Case: Collinson Inc.
- Module 4 External Environment I Opportunities and Risks Definition and review of the difficulties and factors to be considered in dealing with the external environment Case: Limelight for Children Inc.
- Module 5 External Environment II Environmental Research
 Generating ideas, sources for strategic information,
 processing and gathering information, and the difficulties
 involved
 Case: Notes on the Fashion Idustry (1972)

Readings: "Bagetelle"
"Manchester Children's Wear"

Module 6 Formulation of Strategies (Alternatives)

- The strategy formation process and factors for evaluating and selecting alternatives

Case: Belle Ltd.

Reading: "Wood Palette Provincial Industry"

Module 7 Strategy Choice

- Criteria influencing the choice process, contingencies strategies, and influences individuals on strategic choices

Case: Agrivent Inc.

Reading: "The Quebec Industrial and Commercial Markets for Ventilation"

Module 8 Strategy Implementation

- The relationships between organizational structure, strategy and implementation

Case: Sabote

Module 9 Revision and Control of Plans of Action

- A complete detailed review of the evaluation process Case: Heavy Duty Workshop Ltd.

Module 10 Innovation

- Types of innovation, the innovation process, predominant factors, and strengths and weaknesses of innovation in certain areas of economic activity

Case: Sasual Miss: Product Square Dudes

MT-7 Management by Objectives and Results (1977)

Management by Objectives and Results is an advanced level course intended for owners, managers, and key administrators in small and medium sized businesses, and anyone with some management experience who is interested in MBO. The course objectives are to explain the basic elements of an MBO system and to show how it can be implemented in a small business.

The course materials include: texts, case studies, exercises, leader's notes and optional video-cassettes (see separate description). The course outline is as follows:

- Module 1 Introduction to MBO
 - The philosophy and process of MBO and the organization analysis that precedes implementing this system Case: Saskind Clothing Ltd.
- Module 2 MBO as a System of Management
 - The systems concept and the seven phases of the MBO process

Case: An Over Efficient Employee

- Module 3 The Determination and Formulation of Objectives
 - The hierarchy of objectives and what constitutes good and bad objectives

Exercise: The Types of Objectives

- Module 4 Formation, Selection and Implementation of Plans of Action
 Establishing and implementing plans of action
 Exercise: Completion of Tables and Forms
- Module 5 Management Styles
 - Theories of motivation and different styles of managing (autocratic, democratic, participative, etc.)
 Exercise: Questionnaire on Management Style and

Philosophy

- Module 6 Methods and Strategies of Implementation
 - prerequisites to implementation of MBO and the steps involved

Case: The Electronic Company Ltd.

- Module 7 Evaluation of Results and Performance
 - Various evaluation approaches and how to use them.
 Relationships between evaluation interview, remuneration, promotion and unions

Role Play: Performance Evaluation Interview

- Module 8 Dynamic Aspects of MBO Role Play: The clarification of tasks and negotiating objectives
- Module 9 Implementing an MBO System
 An outline of the principle problems of implementation
 Exercise: Questionnaire on Strategy of Implementation
- Module 10 Perspectives and Summary
 Review of the elements implementation steps, styles of management, the MBO process and its problems
 Case: The V.M.I. Company

MT-7 Management by Objectives and Results Classroom Video-Cassettes Series (1978)

This series of 10 video-cassettes is designed to go hand in hand with the written course materials. The use of dramatizations, graphic presentations and interviews combine to show the MBO philosophy and how it can be applied to small and medium sized businesses. The video presentation for each module closely parallels the written materials and, as such, the series represents a useful instructional aid.

- Module 1 Introduction to MBO and Analysis of Organizational Problems (16 minutes)
 - MBO as a philosophy of management and as a system of results: parallel drawn to a housewife shopping
 - The narrator illustrates the 7 steps of the MBO process by cooking an omelette
 - Graphic profile of the economic and management system
- Module 2 MBO as a System of Management (14 minutes)
 - pictorial illustration explaining the systems concept and its components.
 - Implementing MBO in a business and the 7 phases of the MBO process are discussed with the aid of graphics, slides, and cartoons.
- Module 3 The Determination and Formulation of Objectives (14 minutes)
 - Illustrative analogy drawn to the department of justice and a hospital to explain the hierarchy of objectives
 - Graphics effectively utilized to discuss the characteristics and analysis of objectives and the process of determining objectives in the MBO context.
- Module 4 Plans of Action (11 minutes)
 - A situation, "Reaching the Top of a Mountain", is created to illustrate the process of establishing and implementing plans of action
- Moduel 5 Management Styles (16 minutes)
 - Graphics aid the narrator in examining the hierarchy of needs
 - Dramatization successfully establishes the characteristics of the 5 styles of management
- Module 6 Strategies for Implementing an MBO System (17 minutes)
 - The strategy and method of implementing an MBO system is discussed in an interview with a zone manager of Steinberg's Incorporated.

Module 7 Evaluation of Results and Performance (12 minutes)

- Advantages, disadvantages and principles of various approaches to performance evaluation discussed by narrator
- Arguments for performance evaluation in the spirit of MBO drawn with the aid of graphics and an interview with a spokesman from Steinberg's Incorporated.
- Module 8 Dynamics of MBO (18 minutes)
 - Four retired businessmen draw from their personal experiences to discuss the principles and advantages of implementing an MBO system
- Module 9 Implementing MBO in a Business (17 minutes)
 Amusing anecdotes present the principle problems of implementing MBO
- Module 10 Prespectives and Summary (14 minutes)
 The narrator presents a concise review of the elements of an MBO system.

(MT) Human Resources Management (1973)

Human Resources Management is an advanced level course intended for owners, managers and key employees in any enterprise and people who are thinking of starting a business. The objective of the course is to provide the tools necessary to improve manpower utilization through teamwork.

The course materials include: texts, cases, supplementary readings and leader's notes. The course outline is as follows:

Module 1 Overview

Case: Glencoe Manufacturing Company

Readings: Behavioural Science and Business -

The Changing Scene The Price of Success

Module 2 Organization Planning

Cases: Volume Distributors Inc.

Hegner Meat-Packing Company

The Reliable H.R.W. Manufacturing Co. Ltd.

Reading: Understanding and Increasing

Organizational Effectiveness

Delegation in management

Module 3 Motivation

Cases: Tensor Electronics

Sussex Oil Company

Haver Industries, Inc. (A)

Readings: Employee Morale

An Experiement in Management - Putting

Theory Y to the Test

Module 4 Selection of Personnel

Cases: Precision Machine Company (Role Playing)

Frank's Service Station Cloverdale Restaurant Ltd.

Reading: Investment in People

Module 5 Induction and Training

Cases: Work and the Worker - Meridan

Arms Company Lanis Men's Store

Module 6 Performance and Appraisal

Cases: Blake Processing Company

Smith's Wholesale House

Northstar Chemical Company

Reading: Management Functions - Theory X and Theory Y

Module 7 Compensation

Cases: The Automotive Supply Parts Col.

Reiker Machine Shop Inc.

Reading: Classification and Compensation Procedures

Module 8 Industrial Relations

Cases: The Gerrard Mattress Company
Ace Truck Repair Incorporated

Readings: Industrial Relations Glossary

Module 9 Communciation

Cases: Sealand Company

Delta Design Inc.

Reading: Listening to People

Module 10 Constructing an Effective Environment

Case: The Fisher Insurance Agency

Manufacturing and Production Series (MP)

MP-1 Manufacturing, Planning and Control (1972)

Manufacturing, Planning and Control is an advanced level course intended for owners or managers of wholesale and service operations of any type and size, and management personnel in the manufacturing, engineering and contracting field. The course objectives are to develop the production organization, to determine optimum plant capacity and long-term labour and equipment requirements, and to plan product lines. The present edition is acceptable but should be reviewed prior to adoption.

The course materials include: readings, case studies and leader's notes. The course outline is as follows:

- Module 1 Introduction
 Case: Absolute Level Company
- Module 2 The Language and tools of Production Case: Laboratory Equipment Co. Ltd.
- Module 3 Methods and Time Study
 Case: Mallory Paint Co. Ltd.
- Module 4 Wage Administration
 Case: Sampson Sewer Tile Works
- Module 5 Plant Layout and Work Flow Case: Mitchell Woodworking co.
- Module 6 Production Control Scheduling Case: Oronation Manufacturing
- Module 7 Production Control Inventory Control Stores Control Case: McArthur Mirror Company Ltd.
- Module 8 Production Control Inventory Control Size of Production Run
 Case: Tuxford Electronics Inc.
- Module 9 Production Control Cost Control
 Case: Grover Screw Machine Products
- Module 10 Production Planning and Control Summary Case: Juno Company

MP-3 Cost Accounting - Manufacturing (1967)

Ost Accounting - Manufacturing is an advanced level course intended for owners, managers or bookkeepers of manufacturing businesses who already have a basic knowledge of the accounting process. The course objectives are to explain the basic underlying principles, to define the terminology and to stress the advantages of Ost Accounting. Although this is an older course the present edition is acceptable.

The course materials include: readings, case studies, problems, and leader's notes. The course outline is as follows:

- Module 1 Introduction to Cost Accounting Case: Playtime Limited
- Module 2 Job Order Costs
 Case: Meyers Manufacturing Company
- Module 3 Analysis of Variances
 Case: Continential Furniture Company
- Module 4 Inventory Control and Valuation Case: Metal Manufacturing Company
- Module 5 Process Costing, Joint Products and By Products Case: Process Chemicals Ltd. (A)
- Module 6 Differential Costing
 Case: Process Chemicals Ltd. (B)

Marketing Series MG

MG-l Marketing for Small Business (1978)

Marketing for Small Business is an introductory course intended for anyone who is interested in marketing, with special emphasis on small business owners and managers. The course objective is to give owners and managers a basic overview of marketing and how it relates to everyday business operations.

The course materials include: texts, case studies, glossary of terms and leader's notes. The course outline is as follows:

Foreword Separate Module Containing:

- Course Outline, Table of Contents, Selected Graphics and Case Abstracts

Module 1 What is Marketing

- Definition, marketing management concept, systems approach, external and internal variables, and the role of management

Reading: How to Analyse a Case Study

Case: Jeff Silverman

Module 2 Marketing Research

- The nature of marketing research, primary and secondary data, and six steps in conducting marketing research Case: Northern Water Softeners

Module 3 Developing Market Profiles

 Why develop a market profile? Market segmentation, target markets, product differentiation, and developing a marketing strategy
 Case: Bruce Prentice

Module 4 Consumer Behaviour

- Where, what, and why do people buy?
- Factors influencing consumer decisions
Case: Dempster's Bike Shop

Module 5 Product/Service Mix

- The total product concept, product classifications, product image, branding, the importance of packaging, product planning concepts, and the product life cycle Case: Fareway Enterprises

Module 6 The Price/Value Mix

- Price as a function of value and cost, mark-up pricing, demand based pricing, and pricing policies
Case: Wyzinski Construction

Module 7 Promotion/Advertising

- The four elements of promotion, advertising and promotion objectives, how consumers buy, planning an ad campaign, determining a promotion budget, and where to spend your money.

Case: Target Cigarettes

Module 8 Transportation/Channel Mix

- Channel choices and selection and the importance of physical distribution

Case: Canadianna Jeweller

Module 9 Retailing

- Classification of retailers and retailing trends Case: Oblden Horseshoe Canners Assoc.

Module 10 The Marketing Evironment

- Factors which influence the marketing mix, the role of government, and consumerism
- Glossary of Marketing Terms

Case: Thermo-Wash

MG-2 Forecasting: Predict Your Sales and Profits (1979)

Forecasting is an intermediate level course intended for anyone who is interested in learning how to forecast. The course objective is to give owners and managers a basic understanding of the importance, concepts, and usefulness of forecasting. Previous experience in forecasting is not required but participants should have a basic understanding of financial statements and marketing. By presenting a judgemental approach to forecasting (vs mathematical formulas) the course minimizes the use of complicated calculations. Participants should, however, feel comfortable performing a lot of basic calculations. A business calculator is required for this purpose.

The course materials include: text, case studies, exercises, readings, course evaluation and leader's notes. The course outline is as follows:

- Module 1 "What is Forecasting?"
 - Definition
 - Marketing forecasts vs. other types
 - The future, probability, and risk

Case: Hotfoot's Hothouse (A)

- Module 2 "Am I Asking the Right Questions?"
 - The forecast/corporate planning relationship
 - Demand, product, characteristics, and elasticity of demand Reading: "Forecasting Demand and Estimating Market Size"
- Module 3 Evaluating the Business Climate
 - The importance of complete information
 - Relationships between the economy, industry, Consumer behaviour, etc.
 - Sources of information

Reading: INFORMAT Weekly Bulletin

Case: Hotfoot's Hothouse (B)

- Module 4 What Facts Should You Base Your Forecast On?
 - Selecting relevant historical data and organizing the facts
 - Exchange rates and unusual occurences Case: Tyro Photo Supply Ltd. (A)
- Module 5 Using the Information You Have Gathered
 - Adjusting financial statement figures
 - Choosing and using deflators Case: Tyro Photo Supply Ltd. (B)

Module 6 Developing the Forecast

- Graphing adjusted sales, gross profit and net income information helps forecasters analyse trends
- Derivation and usefulness of trend lines
- Judgemental projection of sales, gross profit and net income

Case: Tyro Photo Supply Ltd. (C)

Module 7 Details of Forecasting Development

- Decomposition of forecast figures by month, season product line
- Limitations of forecast figures Case: Tyro Photo Supply Ltd. (D)
- Module 8 Interpreting the Forecast Should Policies be Changed?
 - Interpreting changes in sales, gross profit and net income
 - Financial ratios and their usefulness
 - Should changes be made?

Case: Tyro Photo Supply Ltd. (E)

Module 9 Putting Your Forecast to Work

- Directions that policy changes can take
- Conditions under which each strategy is usually effective and criteria for selection
- Implementing policy changes and monitoring progress Exercise: Tyro Photo Supply Ltd. (F)

Module 10 Forecasting In a Nutshell

- Summary of the forecasting process Case: Conkless Calculator Co.

MG-3 Understanding Your Customers (1980)

Understanding Your Customers is an intermediate level course intended for anyone who is interested in improving the sales and profitability of their business. Thus, this course has been developed to be relevant and useful to owners and managers of retail, service and manufacturing concerns. The course objectives are to help owners and managers improve the sales and profitability of their business by understanding consumer behaviour and to use this understanding to better satisfy customer needs. Participants should have a basic understanding of marketing at the introductory level.

The course materials include: texts, case studies, exercises, course evaluation and Leader's Guide. The course outline is as follows:

- Foreword Separate module containing:
 - Course Outline and Table of Contents
 - Descriptions of Case Studies
- Module 1 Why Should You Understand Your Customers?
 - There are Six Principles of Consumer Behaviour
 - Economics, social sciences, advertising and mobility are important

Case: Buying a Living -room set

- Module 2 Motivation, the Basis of Consumer Behaviour
 - Consumers Go Through A Decision-making Process
 - Six Ways Consumers Purchase
 - Customer Motivation and Your Marketing Strategy
 - Why Do You Buy What You Buy? Case: Trans-Canada Ford, Ltd.
- Module 3 Perception How You View The World Around You?
 - Why Do You Perceive What You Perceive?
 - How to Get Your Customer's Attention
 - J.N.D. It's More Meaningful Than You Think! Case: Melnick Foods Ltd.
- Module 4 How Consumers Learn
 - Motivation, Experience, and Repetition The Keys to Learning
 - The Learning Process Consists of Five Components
 - Consumers Learn in Three Basic Ways Case: Introduction of a New Cleanser
- Module 5 Attitudes and How to Change Them
 - What is an Attitude?
 - Attitude Inconsistency and Changing Attitudes
 - Three Tips to Help Insure Your Succuss!

Case: Rally Racquets Inc.

Module 6 Culture Affects What, Where, and How We Buy

- Canada is a Mosiac of Ethnic Subcultures
- French and English Canadians The Difference is More Than Language!
- Three Tips That Will Save You Time, Money and Effort Case: A Healthier You, Ltd.
- Module 7 How Do Your Customers Rate on the Social Class Scale?
 - Four Factors Determine Social Class
 - Two Classes Make up 65% of All Consumers
 - How Social Class Affects Buying Decisions

Case: Richeler - General Inc.

- Module 8 Groups Influence Nearly Everything We Buy and Do
 - Groups Come in All Shapes and Sizes
 - Primary Goups Face-to-Face Communication
 - Secondary Groups Many Members, Little Intimacy
 - Three Factors Affect Reference Group Influence

Case: Sparkling Ale Limited

- Module 9 What Family Influence Means to Your Business
 - Family Influences Who Decides to Purchase What?
 - The Family has a Life Cycle Too!
 - Six Trends That Could Affect Your Business

Case: Calex Campground Corporation

- Module 10 Attracting and Keeping Your Customers
 - Location The Closer the Better
 - Store Personnel They <u>Must</u> be Friendly, Informative, Courteous and Polite
 - Three Ways You Can Attract New Customers
 - How to Get Oustomers to Say "Yes, I'll Take It!"
 - Course Evaluation Questionnaire

Case: Kiddy's Shoe World Inc.

MG-4 Marketing Your Product (1979)

Marketing Your Product is an intermediate level course intended for anyone who is interested in improving their ability to successfully market a product. The objective of the course is to outline ways of making or improving a firm's product offering. By exploring basic product marketing concepts and relating them to small business, this course will help participants to better meet consumer needs. This often results in increased sales and profits. Before taking this course, participants should have a basic understanding of marketing at the introductory level.

The course materials include: texts, case studies, exercises, readings and leader's notes. The course outline is as follows:

- Module 1 What, How and Why Customers Buy
 - The marketing concept, what is a product?
 - Industrial vs. individual buyers
 - Purchasing as a decision process, understanding consumer needs and influencing purchase decisions.

Exercise

- Module 2 Developing a Market Strategy
 - Segmented vs. non-segmented approaches; ways to segment a market
 - Getting information and selection of a target market
 - The marketing mix

Exercise

Case: The Shirt Store

- Module 3 Forecasting Product Sales
 - Evaluating the business climate, general economic conditions and your industry?
 - Obtaining and screening information
 - The forecast predicts the important events that will probably happen
 - Asking the right questions and developing a forecast Reading: "How a Retailer Can Profit From Facts" Case: Futura Industries, Inc.
- Module 4 Choosing and Developing Your Product
 - What is your product?
 - Constraints, selecting and testing products, product adoption curves and other decision criteria

Case: Mr. Tenderflake Bakery Inc.

Module 5 Developing Effective Brand Images

- Brand configurations and adopting the right policy
- Some implications of brand policy
- What constitutes a good brand name?

Exercise

Case: Norge Canada, Ltd.

Module 6 Product Management

- Good product management improves market share
- Packaging size and colour, shelf life and quality, the law
- Making improvements

Case: United Breweries Ltd.

Module 7 Effective Distribution is a must!

- Middlemen and choosing distribution channel(s)
- The physical movement of goods

Case: Norge, Canada Itd. Faces a Distribution Problem

Module 8 Promoting Your Product

- Promotion as a group of related activities, not just a gimmick
- Choosing a promotional strategy and using promotion tools
- Promotion as communication

Reading: "Promotion - The Problem-Solver"

Case: Burncraft Cycle Itd.

Module 9 Pricing Can Be an Important Marketing Tool

- Factors to consider, including internal constraints, product attributes and the nature of an effective pricing policy
- Pricing decisions in today's business environment

Reading: "Retail Pricing"

Case: Norge, Canada Ltd. Faces a Pricing Problem

Module 10 Price vs. Production Costs - Profit or Loss?

 Specific pricing methods, including cost plus mark-up, return on investment, break-even analysis and marginal analysis

Reading: "Marginal Cost Pricing Helps Maximize Profits" Case: Norge, Canada Itd.

MG-7 Marketing Management for the Middlemen (1973)

Marketing Management for the Middleman is an intermediate level course intended for anyone who is interested or working in distribution, especially wholesalers, brokers and managers of cooperative associations. The objective of the course is to equip owners and managers of distribution businesses with the basic concepts and tools needed to identify and solve problems in today's dynamic marketplace.

The course materials include: selected articles, case studies, bibliography and leader's notes. The course outline is as follows:

- Module 1 Introduction: Wholesaling and the Distribution System Articles
 - The Wholesaling Sector in Canada
 - Developing a Distributive System
- Module 2 The Customer: A Marketing Orientation Cases: Western Pipe Products Mark Filings Co. (A)

Sutherland Farm

Articles

- What is Marketing Today?
- Marketing Strategy within the Marketing Plan
- Emerging Patterns of Distribution: A Marketing Orientation
- Manufacturers' Agent Adaption or Atrophy
- Module 3 The Product-Service Mix

Cases: Tronics Ltd. (A)

Mark Filings Co. (B)

Myles, Marshall & Son Ltd.

Alpha Motors Ita. Winnipeg Music House

Articles

- Wholesale Buying and Merchandising
- Survival Through Differentiation
- How to Decide Which Product to Junk
- Buying Sales and Established Accounts
- Module 4 Pricing and Grouping for Profit

Cases: Mark Filings Co. (C)

Restivo Fruit & Vegetable Co. Ltd.

George Riley

Module 4 cont'd

Articles

- Pricing a New Product
- The Importance of Cost in Pricing
- Marketing and the Combines Investigation Act
- The Combines Investigation Act Offences in Relation to
- How Trade Associations Help Small Business

Module 5 Sales and Distribution Analysis

Cases: Tronics Ltd. (B)
Tronics Ltd. (C)
Malcolm McNair
White Brother (A)

Module 6 Advertising and Personal Selling

Cases: Airflo Co.
The Johnson Co.
John Crissy
Blair Williams Agency
White Brothers (B)
Fred Gamble Co.

Articles

- I.P.S.O. in Industrial Advertising
- The Salesman's Role Revisited
- What Makes a Good Salesman
- The Management Job of the District Manager
- Easy to Make Flip Charts Provide Selling Tools

Module 7 The Distributor-Supplier Relationship

Cases: Rasco Ltd.
Cordon Revzan
Cotton Mather

Articles

- Pricing to Gain Wholesalers' Selling Support
- Ten Commandments of Good Communication
- How Can You Find "Qualified" Manufacturers' Representatives

A Selected Bibliography

MG-8 Practical Decision-Making in Marketing (1973)

Practical Decision-Making in Marketing is an intermediate level course intended for anyone who is interested in a basic understanding of marketing with special emphasis on small business owners and managers. The objective of the course is to explore the marketing function and its relation to the firm's overall activities with a view to maximizing the firm's resources.

The course materials include: case studies, readings and leader's notes. The course outline is as follows:

Module 1 The Marketing Function in Organization Structure Cases: Salvo Paint and Varnish Co. Ltd.

Colburn Pharmacy (A)

Quick Laundry and Dry Cleaning Co.

Module 2 Identifying Market Segments
Cases: Lavoisier Children's Products Ltd.
Colburn's Pharmacy (B)
Noble Real Estate

Mdoule 3 Customer Behaviour
Cases: Goodard Electronic Laboratory Ltd.
McLean Furnishings Ltd. (A)
The Brass Bannister

Module 4 Marketing Research
Cases: James Electronics
Johnston Hardware
Beef 'N' Bun Itd.

Module 5 The Product-Service Mix
Cases: Playtime Camper Co.
Battery Radio and T.V.
The Byrd Nest

Module 6 Pricing the Product or Service
Cases: Canadian Pines Reproduction Ltd.
Marylou Gifts
Calgary Upholstery

Module 7 Mass Selling
Cases: Acme Abrasives Ltd.
Valleyhill Farm Groceteria (A)
Aaron Catering Service

Module 8 Distribution Channel Relationships
Cases: Aunt Maude's Pride
Valleyhill Farm Groceteria (B)
Cleanit Itd.

Module 9 Environmental Issues and Social Change

Cases: Jamaican Bakery Montgomery Books The Golden Tones

Module 10 The Use of Marketing Consultants

Cases: Quality Mattress Manufacturing Co.

Andrea's Haute Couture Dykes Studios Itd.

Module 11 Planning for Marketing Success

Cases: Aluminum Products Ltd.

McLean Furnishings Ltd. (B) Central Kosher Delicatessen

Retail Series (RG)

RG-1 Retailing: An Introduction (1978)

Retailing is an introductory course intended for: owners and managers of small and medium sized retail businesses, all staff with retailing responsibilities in any type of manufacturing or distribution business, and people who are starting a retail business. The course objectives are to initiate beginners to many aspects of retailing and to help experienced merchants question and review some of their management methods.

The course materials include: case studies, exercises, texts and leader's notes. The course outline is as follows:

Foreword Separate module containing

- Course Outline and Table of Contents

Module 1 Retailing and Financial statements

- Preparation of a balance sheet

- Preparation of a profit and loss statement

Case: Haberdasher Counter Ltd.

Module 2 Basic Accounting

- Analysis of debit and credit transactions

- Recording of transactions in a journal

- Recording of transactions in a general ledger

- Preparation of a balance sheet and a profit and loss statement

Case: Capharneum Boutique

Module 3 Buying: What and Where?

- Allocation of purchases

Cases: Mr. Francis' Store

Module 4 Terms of Sale and Pricing

- Establishing merchandise cost

- Establishing a selling price

Case: Disco-O-Sound Ltd.

Module 5 Management, Planning and Controls

- Preparation of a budget

Case: Teevee Store

Module 6 Financial Analysis

- Analysis of profit and loss statements

- Calculation of ratios

- Analysis of long-term position of balance sheet

Case: The Haberdasher Counter Ltd.

Module 7 Location

- Establishment and analysis of criteria affecting store location

Case: Smallstore's Groceteria

Module 8 Promotion

- Analysis of a promotional campaign Case: "Beauty" Cosmetic Products

Module 9 Personnel Selection

- Creation of job descriptions

- Selection of personnel - Recruitment of personnel

Case: World Wide Travel Agency Ltd.

Module 10 Personnel Training and Remuneration

- Motivation of personnel

Case: World Wide Travel Agency Ltd.

Salesmanship Series (SM)

SM-1 The ABC's of Selling (1980)

The ABC's of Selling is an introductory course intended for anyone who is interested in working in sales, particularly in retail selling. No previous knowledge of selling is needed to benefit from this course. The objective of the course is to give owners, managers and their employees a basic understanding of successful selling techniques and the sales function.

The course materials include: participant modules, case studies, role plays, exercises, leader's notes and a unique pocket pamphlet to summarize the course and allow on-the-job self-evaluation. The course outline is as follows:

Foreword Separate module containing:

- Course Outline
- Table of Contents
- General Descriptions of Case Studies and Role Plays
- Module 1 Is Selling the profession for You?
 - History of selling
 - The professional/creative/sales relationship

Exercise: The Nicest Trade in the World

- Module 2 Know Your Customer
 - Customer needs
 - The purchasing process Role Play: The Third Eye
- Module 3 Portrait of a Salesperson
 - How to be a professional
 - How to succeed in sales
 - Self-appraisal questionnaire Case Study: Norm Rockwell's Dream
- Module 4 What are you Selling?
 - Your total product
 - Your competition
 - Where to find your information Exercise: What are You Selling?
- Module 5 What You Say is Important!
 - Attention Interest Desire Action
 - Structuring the sales conversation
 - Case Study: The Cactus Floral Centre Inc.

Module 6 Knowing How to Say "Hello!"

- "Be prepared"
- The greeting
- Uncovering the need

Exercise: How to Say "Hello!"

Module 7 The Art of Closing a Sale

- When to close
- How to close

Role Play: "Pure-Air" Air Conditioners

Module 8 Starring ... Your Product!

- Presenting advantages
- The demonstration
- Justification

Case Study: Central Vac Inc.

Module 9 The "Sand Traps" of Selling

- Objections their usefulness and how to treat them
- Excuses and their meaning
- Overselling what it is and how to avoid it

Role Play: Provincial Construction Ltd.

Module 10 Your Customer ... Your Friend!

- Developing customers' habits
- Pocket pamphlet to summarize course and allow on-the-job self-evaluation
- Course Evaluation questionaire Role Play: Northern Kennels Inc.

Supervisory Series (SV)

SV- Training Modules for First Line Supervisor (1978)

This series is intended for first line supervisors in any organization and those aspiring to supervisory responsibilities. It is also useful for owner or manager who wants more training in supervisory skills. The objective of the series is to provide all the basic background required for effective performance in a first line supervisory position.

There are 72 modules each with a Participant's Guide and a Leader's Guide. The course outlines is as follows:

Modules	Introduction To Managing
SV-1 SV-2	Role of the Supervisor Management Process: An Introduction
	Improving Productivity
SV-3 SV-4 SV-5 SV-6 SV-7 SV-8 SV-54	Managing Physical Resources Improving Productivity Productivity and Work Simplification I Productivity and Work Simplification II Productivity and Work Simplification III Productivity and Work Simplification IV Job Enrichment
	Budgets
SV-11 SV-12	Cost Accounting: The Cost Accountant - Friend or Foe? Introduction to Budgeting
	Managing the Workload
SV-9 SV-10 SV-20 SV-21 SV-22 SV-23 SV-24 SV-25 SV-26 SV-27	Time Management Strategies for Effective Time Management Managing the Workload: The Management process Managing the Workload: Setting Goals Managing the Workload: Planning Managing the Workload: Organizing and Leading Managing the Workload: Coordinating and Controlling Allocating Human Resources Scheduling Staff Delegation

	Decision-Making and Problem Solving
SV-17 SV-18 SV-19	Decision-Making Techniques Techniques for Making Decisions and Solving Problems I Techniques for Making Decisions and Solving Problems II
	Leadership
SV-55 SV-56 Sv-53 SV-72 SV-57 SV-58	Leadership Styles Leadership Characteristics Styles of Handling Conflict Women as Supervisors and Supervising Women Team Building I Team Building II
Modules	Motivation
SV-49 SV-50 SV-51 SV-52	Understanding People at Work Motivating Employees Motivation Through Achievement Developing and Maintaining Morale
	Performance Appraisal
SV-46 SV-47 SV-48 SV-60 SV-61	Performance Appraisal Setting Standards and Performance Evaluation Appraising Employee Performance Counselling Employees Discipline: An Introduction
	The Staffing Function
SV-31 SV-39 SV-40 SV-41 SV-45	Interviewing: An Introduction Selection of Staff Staff Selection Staff Selection: The Screening Process Exit Interviews
50 13	The Training Function
SV-42 SV-43 SV-44	Training and Instructing Employees Training Training in Job Skills
	Labour Relations
SV-62 SV-63 SV-64	Labour Relations: An Introduction Labour Relations: The Collective Agreement Labour Relations: Administration of the Collective Agreement

SV-65	Labour Relations: Recognizing the Causes and Prevention
	of Grievances
SV-66	Labour Relations: The Grievance and Arbitration Procedure
SV-67	Labour Relations: Employee Problems
SV-68	Labour Relations: Discipline
SV-69	Labour Relations: Legal and Illegal Activities
SV-70	Labour Relations: Government Requirements
SV-71	Labour Relations: Preventative Labour Relations
	<u>Safety</u>
SV-13	Safety: Instruction
SV-14	Safety: Housekeeping
SV-15	Safety: Accident Prevention and Wearing Protective
	Equipment
SV-16	Accident Investigation and Reporting
	Communication Skills
SV-17	Developing Communication Skills: The Communication
CT 22	Process Developing Communication Skills, Lintarius
SV-33 SV-34	Developing Communication Skills: Listening Developing Communication Skills: One Way/Two Way
5V-34	Developing Communication Skills: One Way/Two Way Communication
SV-35	Developing Communication Skills: Run a Better Meeting
5v 5 5	be veloping communication by the factor recently
	The Written Word
SV-36	Developing Communication Skills: Report Writing
Sv-37	Developing Communication Skills: Memo and Letter Writing
SV-38	Reading More Efficiently
27 30	Today Tiole Deletera
	Personal Development
SV-29	Meeting Management
SV-30	Non Verbal Communication and Perception of Others
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