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## An Analysis of the Relationship between the Instructional Emphasis of Two Filing Textbooks Commonly Used in Secondary Schools and Their Relation to the Filing Procedures in the Business Office

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AN ANALYSIS OF THE RELATIONSHIP BETWEEN  
THE INSTRUCTIONAL EMPHASIS OF TWO FILING TEXTBOOKS  
COMMONLY USED IN SECONDARY SCHOOLS AND THEIR RELATION  
TO THE FILING PROCEDURES IN THE BUSINESS OFFICE

by

Patricia Ann Skinner

A Project Report  
Submitted to the  
Faculty of The Graduate College  
in partial fulfillment  
of the  
Specialist of Arts Degree

Western Michigan University  
Kalamazoo, Michigan  
April 1973

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THE INSTRUCTIONAL EMPHASIS OF TWO FILING TEXTBOOKS  
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Patricia Ann Skinner, Sp.A.

Western Michigan University, 1973

This study compared the instructional material in two textbooks commonly used for high school filing instruction with the perceptions of records supervisors and office practice teachers.

A questionnaire was designed for each of the two major groups of respondents. Usable survey instruments were completed by supervisors of 67 offices in the Benton Harbor-St. Joseph area and office practice teachers in the 13 high schools in the same geographic area.

While the records supervisors and office practice teachers were in agreement on a number of points relating to the filing process and instructional emphases (using a rank-order mismatch formula), they were in great disagreement as to the importance of teaching the following: subject filing, geographic filing, numeric filing, tabs, requisitions, file labels, charge out, release, date and time stamping, and coding.

Because of the disagreement regarding the importance or unimportance of teaching certain file tasks, office education teachers should by task analysis determine those file tasks performed by office workers in their specific employment area for purposes of updating course content.

## ACKNOWLEDGMENTS

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The person who deserves my heartfelt thanks and deepest appreciation is my husband Frank, who not only helped me with the statistical part of this study, but also gave me encouragement and sacrificed many things in order that I might work on this project.

Patricia Ann Skinner

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## TABLE OF CONTENTS

	Page
ACKNOWLEDGMENTS . . . . .	ii
LIST OF TABLES. . . . .	viii
LIST OF APPENDIXES. . . . .	xi
CHAPTER	
I     INTRODUCTION. . . . .	1
Purpose of the Study . . . . .	3
Significance of the Study. . . . .	3
Limitations. . . . .	5
Assumptions. . . . .	5
Definition of Terms. . . . .	5
II    REVIEW OF RELATED LITERATURE. . . . .	10
Research Studies . . . . .	10
Professional Literature. . . . .	13
Summary. . . . .	17
III   PROCEDURES. . . . .	18
Methods of Gathering Data. . . . .	18
Introduction. . . . .	18
Developing the Research Instruments . . . . .	18
The Questionnaires. . . . .	18
The Pilot Study . . . . .	19
Selecting the Respondents . . . . .	20

CHAPTER		Page
	Collecting the Data. . . . .	21
	Questionnaires Received from Records Supervisors . . . . .	21
	Titles of Persons Responding to Questionnaires. . . . .	23
	Questionnaires Received from Office Practice Teachers . . . . .	24
	Analyzing the Data . . . . .	24
	Introduction. . . . .	24
	Information Reported in Tables. . . . .	24
	Rank-Order Lists. . . . .	25
IV	BACKGROUND INFORMATION CONCERNING THE JOB OF A FILE CLERK IN THE COMPANIES SURVEYED . . . . .	29
	Introduction . . . . .	29
	Number of Workers Employed as Full-Time File Clerks . . . . .	29
	Number of Workers Employed as Full-Time File Clerks in Relation to Size of Companies Responding . . . . .	30
	Qualifications Necessary to Become a File Clerk in a Particular Company and Rank of Importance . . . . .	31
	Initial Type of Training Given to a File Clerk. . . . .	35
	Status of Job of File Clerk as Perceived by Respondents. . . . .	36
	Status of Job of File Clerk as Perceived by Respondents in Relation to Size of Companies Responding . . . . .	37



CHAPTER		Page
	Types of Promotions Available for File Clerks. .	38
	Types of Decisions File Clerks Make on their Jobs . . . . .	39
	Method of Controlling Files. . . . .	40
	Method of Controlling Files and Size of Companies Responding . . . . .	40
	Type of Filing Arrangement . . . . .	41
	Type of Filing Arrangement and Size of Companies Responding . . . . .	43
V	DETERMINING THE TASKS OF FILE CLERKS IN OFFICES . . .	45
	Introduction . . . . .	45
	Analysis of Responses Made by Respondents Concerning the Tasks Performed by File Clerks Within Companies . . . . .	45
	Duties of File Clerks Besides Filing . . . . .	48
VI	DETERMINING WHAT IS TAUGHT IN HIGH SCHOOL FILING CLASSES . . . . .	52
	Introduction . . . . .	52
	Where in the Business Curriculum Filing Is Taught . . . . .	52
	Grade Level in High School Where Filing Is Taught . . . . .	53
	Teaching Methodologies Used to Teach Filing. . .	53
	Supplementary Materials Used to Teach Filing . .	54
	Types of Evaluations Given by Teachers to Students in Filing Classes . . . . .	54
	Time Spent Teaching Filing . . . . .	56

CHAPTER		Page
	Tasks and Topics Taught in Filing and Amount of Time Spent on Each. . . . .	56
	Ranking of Tasks Taught in High School Filing Classes. . . . .	57
VII	DETERMINING THE RELATIONSHIP BETWEEN TEXTBOOK INSTRUCTIONAL MATERIAL AND THE INSTRUCTIONAL PROCESS IN THE CLASSROOM. . . . .	62
	Introduction . . . . .	62
	Filing Textbooks Used by High School Filing Teachers . . . . .	62
	Time Spent Teaching Tasks and Topics in Filing .	63
VIII	COMPARING TASKS DONE BY FILE CLERKS WITH TRAINING GIVEN TO HIGH SCHOOL FILING STUDENTS. . . . .	65
	Introduction . . . . .	65
	Summary of Tasks Done by File Clerks . . . . .	65
	Summary of Training Given to High School Filing Students. . . . .	66
	Comparison of Tasks Done by File Clerks to those Done by Filing Students. . . . .	66
IX	COMPARING WHAT RESPONDENTS FROM INDUSTRIES AND OFFICE PRACTICE TEACHERS THINK IS IMPORTANT TO BE TAUGHT IN HIGH SCHOOL FILING CLASSES. . . . .	69
	Introduction . . . . .	69
	Opinions of Respondents From Industry of the Importance of Teaching Filing Activities Listed on Questionnaires. . . . .	69
	Opinions of High School Office Practice Teachers Regarding the Importance of Teaching the Filing Activities Listed on the Questionnaires. . . . .	72

CHAPTER		Page
	Comparison of Opinions of Office Practice Teachers to those of Respondents from Industries Concerning What Should Be Taught in High School Filing Classes. . . . .	76
X	SUMMARY OF FINDINGS . . . . .	80
	Background Information Concerning the Job of a File Clerk in the Companies Surveyed . . . . .	80
	Tasks Performed by File Clerks on their Jobs . .	82
	Filing as Taught in the High Schools Surveyed. .	84
	Comparison of Tasks Done by File Clerks with Training Given to High School Filing Students. .	86
	Comparison of Opinions of Office Practice Teachers and Respondents from Industry Concerning What Is Important to Teach in Filing . . . . .	87
XI	CONCLUSIONS . . . . .	91
XII	RECOMMENDATIONS . . . . .	93
	BIBLIOGRAPHY. . . . .	94

## LIST OF TABLES

Table	Page
1 Summary of Responses to Questionnaires Sent to Records Managers . . . . .	21
2 Number of Responses Received from Companies Related to Size of Companies . . . . .	22
3 Titles of Persons Responding to Questionnaires . . . . .	23
4 Summary of Responses to Questionnaires Sent to Office Practice Teachers . . . . .	24
5 Number of Workers Employed as File Clerks. . . . .	30
6 Number of Workers Employed as Full-Time File Clerks in Relation to Size of Companies Responding . . . . .	31
7 Qualifications Necessary to Become a File Clerk in a Particular Company and Rank of Importance. . . . .	32
8 Rank-Order List of "Very Important" Qualifications Necessary to Become a File Clerk in a Particular Company. . . . .	33
9 Rank-Order List of "Important" Qualifications Necessary to Become a File Clerk in a Particular Company. . . . .	34
10 Initial Type of Training Given to a File Clerk . . . . .	36
11 Status of Job of File Clerk as Perceived by Respondents. . . . .	37
12 Status of Job of File Clerk as Perceived by Respondents in Relation to Size of Companies Responding . . . . .	38
13 Types of Promotions Available for File Clerks. . . . .	39
14 Types of Decisions File Clerks Make on their Jobs. . . . .	40
15 Method of Controlling Files. . . . .	41
16 Method of Controlling Files and Size of Companies Responding . . . . .	42
17 Type of Filing Arrangement within Companies. . . . .	43

Table	Page
18 Type of Filing Arrangement and Size of Companies Responding . . . . .	44
19 Activities of File Clerks in Offices . . . . .	46
20 Rank-Order List of Tasks Performed by File Clerks in Offices in Order of the One Done by Most Companies Surveyed . . . . .	49
21 Duties of File Clerks Besides Filing . . . . .	50
22 Where in the Business Curriculum Filing Is Taught . . . . .	52
23 Grade Level in High School Where Filing Is Taught . . . . .	53
24 Teaching Methodologies Used in Teaching Filing . . . . .	54
25 Supplementary Materials Used in Teaching Filing. . . . .	55
26 Types of Evaluations Given by Teachers to Students in Filing. . . . .	55
27 Time Spent Teaching Filing . . . . .	56
28 Time Spent Teaching Specified Activities in Filing . . . . .	58
29 Rank-Order List in Descending Order of Items Time Is Spent Teaching in Filing Class. . . . .	61
30 Filing Textbooks Used by High School Teachers. . . . .	63
31 Matching of Rank-Order Lists of Tasks Performed by File Clerks and those Taught in High School Filing Classes . . . . .	67
32 Opinions of Respondents from Industry of Importance of Teaching Filing Activities Listed on Questionnaire. . . . .	70
33 Rank-Order List of Items Thought to be of Importance by Business Respondents in Descending Order of Importance . . . . .	73
34 Opinions of High School Office Practice Teachers Regarding the Importance of Teaching Filing Activities Listed on Questionnaires. . . . .	74

**Table****Page**

35	Rank-Order List of Items Thought to be of Importance to Teach by High School Office Practice Teachers in Descending Order of Importance . . . . .	77
36	Matching of Rank-Order Lists of Opinions of Respondents from Industry and High School Office Practice Teachers Concerning What Is Important to Teach in Filing . . . . .	79

## LIST OF APPENDIXES

Appendix		Page
A	Questionnaire Completed by Records Supervisors. . . . .	97
B	Questionnaire Completed by Office Practice Teachers. . . . .	101
C	List of Companies That Were Sent Questionnaires . . . . .	105
D	List of High Schools That Responded to Questionnaires. . . . .	108
E	Letters Sent to Records Supervisors. . . . .	110
F	Size of Companies That Responded to Questionnaires. . . . .	114
G	Letters Sent to Office Practice Teachers . . . . .	117

## CHAPTER I

### INTRODUCTION

The World of Work is continuously changing. Business educators and businessmen are caught in the complexities of technological changes that have been labeled "the robot revolution."<sup>1</sup> Major changes in the characteristics of the population and in the conduct of business procedures and operations not only affect the nature and distribution of the labor force, but also the duties and responsibilities in many occupations.<sup>2</sup>

Business educators are greatly affected by these technological changes and have a responsibility to determine the actual job requirements in today's offices. If business educators are aware of the changes that have taken place within certain jobs, they can better prepare their students for these jobs.

One job which has changed in recent years is that of the file clerk. Place believes that filing in the classroom should be updated.<sup>3</sup> She feels that it is important to teach students an understanding of the importance and life of a record, how it is handled, and how it serves the company. She also believes it is

---

<sup>1</sup>Hawley, William B., and Haines, Peter G., "Vocational Education in a Robot Revolution, Part V: The Unknown Dimensions," College of Education Quarterly, (Michigan State University), January, 1957, pp. 19-26.

<sup>2</sup>Id.

<sup>3</sup>Place, Irene, "What to Teach About Filing and Records Management," Business Education Forum, April, 1967, p. 22.



important for business educators and office managers to work together:<sup>1</sup>

The fast changes being made in filing procedures and equipment make it imperative that business teachers keep on their toes and update their clerical practice courses. Only through thorough acquaintanceship with trends in modern business and closer association with office managers and supervisors will business teachers know what ought to be taught in various units of clerical practice. This area of business is neither routine nor boring; it presents a big challenge, is changing every day, and is interesting.

An investigation of the filing practices and requirements for filing was conducted for the Milwaukee Chapter of the American Records Management Association.<sup>2</sup> None of the employers indicated that high school students were highly proficient in filing; only 38 percent considered them even adequately prepared for the task. Only 24 percent noted any attempt by schools to find out the needs of business in the community with respect to filing and records management. Over 70 percent urged additional filing instruction by the schools.

Kreidberg believes:<sup>3</sup>

It is no longer possible for the untrained individual to fill satisfactorily the requirements of the well organized, smooth operation of the necessary office files in today's business.

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libid.

<sup>2</sup>Goodman, David G., "Filing and Records Management," Eastern Business Teachers' Association Yearbook, 1970, pp. 241-261.

<sup>3</sup>Kreidberg, Irene E., "Records Management--A Must," Selected Readings in Business and Office Occupations, Fifth Yearbook of the National Business Education Association, 1967, pp. 24-30.

### Purpose of the Study

The major purpose of this study is to compare what file clerks do on their jobs with what is taught in high school filing classes and the content of two filing books commonly used in high school filing classes.<sup>1</sup>

The objectives of this study are:

1. To determine the tasks performed by file clerks on their jobs.
2. To determine what is taught in high school filing classes.
3. To determine the relationship between textbook instructional material and the instructional process in the classroom.
4. To compare the tasks done by file clerks to the training given to high school filing students.
5. To compare what records supervisors and office practice teachers believe should be taught in filing.

### Significance of the Study

Because filing is an important office function highly contributive to office efficiency and effectiveness, business teachers must become aware of what is being done in filing occupations. Tonne contends that: "The school should teach the various activities that students are going to undertake in actual life situations."<sup>2</sup>

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<sup>1</sup>Basset, Ernest, Agnew, Peter L., and Goodman, David G., Business Filing and Records Control, South-Western Publishing Company, Third Edition, and Kahn, Gilbert, Yerian, Theodore, and Stewart, Jeffrey, Progressive Filing, McGraw-Hill Book Company, Eighth Edition.

<sup>2</sup>Tonne, Herbert A., Principles of Business Education, McGraw-Hill Book Company, Third Edition, 1961, p. 516.

Prosser and Quigley verify this contention and go one step further, stating:

In order that the learner may be effectively prepared, he must be so trained that he acquires the habit of doing each job in the proper way. . . . Effective vocational training can only be given where the training jobs are carried on in the same way with the same operations, the same tools and the same machines as in the occupation itself. . . . In other words, the learner must not be trained to think one way and be expected to change his habits of thinking when he goes to work.<sup>1</sup>

Involvement of office administrators in this investigation affords them an opportunity to work with business educators toward the common goal of a better-trained file employee.

As Menkus states:

Business educators and records managers ought to be partners. . . . Filing is one of the most widely taught clerical skills. Yet, from the records manager's standpoint, most of the teaching is less than adequate. Step into the records manager's shoes and check a half dozen or so high school or business school filing courses in a given community. You will find that each is using a different text in a slightly different manner. Join with a number of other records managers in the area to suggest that these instructors work together to develop consistent course content (to assure that prospective employers have some measure of the skills possessed by students from these courses).<sup>2</sup>

The findings of this study will aid office educators by:

1. Informing them of the tasks performed by file clerks in offices.

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<sup>1</sup>Prosser, Charles A., and Quigley, Thomas H., Vocational Education in a Democracy (revised ed; Chicago: American Technical Society, 1968), p. 218.

<sup>2</sup>Menkus, Belden, "You Should Be Partners with Records Managers," Business Education World, October, 1966, p. 21.

2. Informing them of what is being taught by other teachers in filing.
3. Informing them of what office administrators think should be taught in filing.
4. Informing them of what office practice teachers think should be taught in filing.

This study should assist business educators in combining their efforts with businessmen to work toward the common goal of graduating students who are fully prepared for the jobs they will obtain.

#### Limitations

This study is limited to:

1. Companies with 11 employees or more in the Benton Harbor - St. Joseph area (104 total companies).
2. Office practice teachers in the high schools in the Benton Harbor - St. Joseph area (14 total).
3. File-clerk oriented tasks only.
4. The instruction in a filing class or filing segment of an office practice class.
5. Filing instruction at the high school level.

#### Assumptions

The following assumptions are made for purposes of this study:

1. All participants will honestly report information requested of them, within the limits of their perceptions.
2. A significantly representative population is available to conduct the study properly.
3. High school filing and records management courses make a contribution to the careers of individuals entering the labor market.

#### Definition of Terms

1. Alphabetic filing -- Any system in which the captions are names of people, organizations, or letters of the alphabet.

2. Alpha-numeric filing -- Filing by a combination of letters of the alphabet and numbers.
3. Card filing -- Processing and storing business information on cards.
4. Charge out method -- A procedure used where records are accounted for that have been removed from the files.
5. Clerk typist -- Person whose primary duties on the job consist of routine typing and other clerical duties.
6. Coding -- The process of marking correspondence with the caption under which it should be stored.
7. Commercial system -- A set of ready-made guides and folders manufactured by various companies for immediate use.
8. Correspondence -- Any records in business, such as letters, orders, invoices, bills, and miscellaneous papers, which are on sheets of paper and not on cards.
9. Cross reference -- A notation in a file or in an index noting that the record being looked for is stored elsewhere.
10. Degree of mismatch -- Relative difference between two statistics.
11. Equipment -- The cabinets, furniture, and miscellaneous devices used in handling and storing records.
12. Fair match -- A moderate or average degree of mismatch.
13. File worker or file clerk -- An employee whose specialized job is to inspect, index, code, sort and store records and to remove them from the files when they are needed.
14. Files -- Containers for storing records--cabinets, open shelves, boxes, or any other type of housing.
15. Filing -- The process of arranging and storing materials safely and systematically so that they can be retrieved easily and quickly when they are needed.
16. Filing system -- An arrangement of equipment and supplies to permit the storing of records according to a definite plan.
17. Filing teacher -- Person who teaches filing in a classroom.
18. Folder -- A Manila container which holds correspondence in files.

19. Follow up -- Checking on borrowed records to effect their return to the files.
20. Geographic filing -- An alphabetic arrangement of records by location.
21. Good match -- Low degree of mismatch.
22. Guide -- A sheet of heavy cardboard with a tab and caption used to guide the eye to the section desired in a file drawer. A guide also serves to support the records in the drawer.
23. Indexing -- Selecting the caption under which a record is to be filed.
24. Inspecting -- Checking the correspondence for a release mark before storing.
25. Irrelevant mismatch -- Mismatch which occurs because of a problem inherent in the items being matched.
26. Label -- A sticker that is attached to the tab of a guide or folder on which the caption appears.
27. Large company -- A company that contains 501-1000 employees.
28. Mail clerk -- A person whose primary duties consist of handling and distributing mail in an office.
29. Medium-sized company -- A company that contains 101-500 employees.
30. Numeric filing -- The filing of correspondence or cards according to numbers.
31. Office filing supervisor -- Person who is in charge of the filing and records keeping in a particular office.
32. Open-shelf filing -- A method of filing in which shelves, rather than filing cabinets with drawers, are used to house records.
33. Poor match -- High degree of mismatch.
34. Records -- All written information that is used by an organization, whether it is in the form of correspondence, cards, tapes, or microfilm.
35. Records management -- Supervising the creation, protection, storage, and disposition of records.

36. Records protection -- Keeping records safe from fire, theft, deterioration, and misplacement.
37. Release marks -- A notation showing that the record has received the required attention and is ready for filing.
38. Retention of records -- A period of time during which records are kept in either active or transfer files before being destroyed.
39. Requisition slip -- A form used to request records from the files.
40. Rotary files -- Range from small desk-top wheels with telephone listings to large cabinets of revolving shelves or bins.
41. Secretary -- Person who schedules appointments, gives information to callers, takes dictation, and otherwise relieves officials of clerical work and minor administrative and business details.
42. Small company -- A company that contains 26-100 employees.
43. Sorting -- Arranging records in sequence after they have been coded to make storing easier.
44. Status -- Position within hierarchy of office jobs in which a particular job is qualified.
45. Stenographer -- Person who takes dictation in shorthand of correspondence, reports, and other matter and transcribes dictated materials using a typewriter. Performs a variety of clerical duties except when working in a stenographic pool. May transcribe material from sound recordings.
46. Subject filing -- The alphabetic arrangement of records by names of topics or things.
47. Tab -- A projection above the body of guides and folders on which the caption appears.
48. Time-stamp notation -- The notation on an incoming piece of correspondence to indicate the date, and often, the hour of receipt.
49. Transfer -- Removal of records from the active files to the inactive files.
50. Unit -- Each part of a name used in indexing.
51. Validity -- Present if a test measures what it claims to measure.

- 52. Very large company -- A company that contains 1001-5000 employees.
- 53. Very small company -- A company that contains 11-25 employees.
- 54. Vertical filing -- The storage of records on edge.
- 55. Visible filing -- Storage of cards in specially designed equipment so that the information near the edges of the cards can be seen easily.



## CHAPTER II

### REVIEW OF RELATED LITERATURE

This chapter is devoted to reviewing research and professional literature related to the study. The research studies that were most useful consisted of surveys of office workers pertaining to job tasks and surveys of business teachers relating to business curricula. The professional literature deals with some of the aspects of filing and records management about which business educators and office administrators have expressed some concern.

#### Research Studies

Frame's 1971 study expressed uncertainty as to whether high school students enrolled in vocational office education courses actually performed the office tasks which were common to the occupations for which they were preparing.<sup>1</sup> The purpose of this study was to determine the relationships which existed between office tasks performed by first- and second-year office employees and by high school students enrolled in vocational office education courses.

While Frame's study includes all office tasks, the filing task as done by beginning office workers is treated in his findings.

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<sup>1</sup>Frame, Terry M., "The Relationships Between Tasks Performed by Selected Office Employees and Office Education Students," unpublished doctoral dissertation, Northern Illinois University, 1971.

Some major findings of the study were:<sup>1</sup>

1. Eighty office tasks including mailing, filing, telephoning and communicating, clerical, and meeting and working with people were performed by significantly higher percentages of office education students than by office employees.
2. In total, 119 office tasks were performed by significantly higher percentages of office education students than by office employees.
3. In total, 116 office tasks including mailing, filing, telephoning and communicating, clerical, and meeting and working with people were performed by significantly higher percentages of employees in selected office occupations than by office education students preparing for employment in these occupations.

The following are some recommendations made by Frame:<sup>2</sup>

1. Teachers should develop simulated and real office experiences to permit increased percentages of high school students enrolled in vocational office education courses to perform those office tasks which have been performed by significantly higher percentages of first- and second-year office employees than high school vocational office education students.
2. Teachers should study selected instructional activities in order to decrease the relatively large percentages of high school students enrolled in vocational office education courses who have performed office tasks which are not commonly performed by first- and second-year office employees.
3. High school students enrolled in vocational office education courses should perform the office tasks which are commonly performed by first- and second-year office employees.

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<sup>1</sup>ibid.

<sup>2</sup>ibid.

4. High school students enrolled in vocational office education courses should perform the same office tasks regardless of the size of the community in which they anticipate to be employed.
5. The present research study should be appropriately modified and implemented nationally and in local communities to determine whether students in vocational office education courses perform the specific tasks which are commonly performed by office employees in the occupations for which they are preparing.
6. Research should be carried out to identify specific skills, knowledges, attitudes, values, interests, and perceptions which are associated with varying degrees of correct or incorrect office task performance.

The purposes of Harley's study were specifically related to filing tasks. They were:<sup>1</sup>

1. To determine the duties, activities, and responsibilities of office workers involved in the management of records.
2. To gather opinions of office managers related to records management instruction at the secondary and postsecondary levels, in order that persons teaching in this area could compare what they are doing with the findings of this study.

According to the findings, over one-half of the office managers questioned thought that filing and mail operations should be stressed in high school records management instruction; over one-third reported that microfilming, records storage, reproduction and photography, records inventory, data processing and correspondence control should

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<sup>1</sup>Harley, Carol Marie, "A Survey of Records Management Procedures of Selected Businesses in Minneapolis, Minnesota, with Implications for Improving Records Management Instruction," M.S., Wisconsin State University, 1969.

be stressed. In general, it was found that those topics which ranked high as units of instruction in records management at the high school level ranked correspondingly low for the college level and vice versa.

### Professional Literature

Many magazine articles have been written by both business educators and office administrators concerning what is necessary and unnecessary to know and be able to do in filing.

The American Records Management Association attempts, through many avenues, to improve the quality of personnel who are employed to do filing and records work.<sup>1</sup> The Association seeks higher standards for employment and high pay for those who are assigned to this important work.

In a survey of records management, at least half of all employers admit they have a turnover problem with filing workers. Although the reasons for such a turnover are not easily proven, investigations do show that a lack of understanding of and training in filing could be one of the major factors.<sup>2</sup> Employers want the secondary and post-secondary schools to give filing instruction to their students. This, they feel, would aid them in their selection of persons properly suited to work in filing and records management. If the schools can

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<sup>1</sup>Goodman, David G., "Filing and Records Management," Eastern Business Teachers' Association Yearbook, 1970, pp. 241-261.

<sup>2</sup>ibid.

instill the respect and interest in records work, less turnover is expected.<sup>1</sup>

Kreidberg noted that \$850 of an executive's salary would be wasted if he waited twelve minutes for a filed record.<sup>2</sup> The person who is selected for employment in filing should be:<sup>3</sup>

. . . one who is interested in working with records, one who has been trained on filing rules and filing systems, is aware of the various types of filing equipment and supplies available in today's market, and is capable of determining the right system as well as the right equipment or the material to be filed. That person must also be capable of analyzing records to establish not only the filing system but the destruction schedule, how long material should be kept in active files, when it should be transferred to inactive, when it should be destroyed, and what should be microfilmed.

Menkus believes that business educators and records managers should be partners and that they now really do not know or understand each other.<sup>4</sup> In analyzing several high school curricula in his area, he found that teachers were all doing something different in the area of filing and records management. He feels records managers and business teachers should work together to determine what students need to know in the area of filing in order to benefit both themselves and the company for which they are employed.

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<sup>1</sup>Goodman, David G., "Recruiting, Training, and Retaining Records Personnel," Records Management Quarterly, January, 1968, pp. 24-30.

<sup>2</sup>Kreidberg, Irene E., "Records Management--A Must," Fifth Yearbook of the National Business Education Association, 1967, pp. 289-290.

<sup>3</sup>op. cit.

<sup>4</sup>Menkus, Belden, "You Should Be Partners with Records Managers," Business Education World, October, 1966, p. 21.

Lauer is also concerned with realistic teaching and preparing students to file in an office.<sup>1</sup> He wonders how many teachers know how and what systems of filing are being used by businesses and industries in their area. He also questions whether teachers are teaching their students to file or just equipping them with the rules of alphabetic filing and letting it go at that.

Laur states:<sup>2</sup>

Filing is not on its way out. It is just being modernized as should your methods of teaching it. . . It is not too much work to organize realistic and relevant training.

Because of their own attitudes toward it, many teachers are guilty of giving their students a pessimistic, dreary picture of filing. They sometimes think of dimly lit, crowded, musty rooms jammed with green metal cabinets stuffed with dusty folders bearing illegible labels. As many writers suggest, business teachers should step out of their classrooms into offices and observe what really is happening in today's offices.

Many times, business teachers and office administrators alike relegate the filing job to the lowest-paid, least-interested and often least-qualified employee. Yet, many problems that arise in the office are attributed to a haphazard, inadequate system of accumulating, classifying, retaining, and releasing information.

With the rising cost of producing paperwork, more and more companies are beginning to realize that correspondence, orders, accounting information, reports, and other written efforts are compiled

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<sup>1</sup>Lauer, William E., "Teach Filing with Office Procedures," The Balance Sheet, February, 1971, pp. 200-201.

<sup>2</sup>ibid.

and recorded as a vital and dynamic part of future management decisions and actions. In April, 1962, the President of the American Records Management Association, spoke to his colleagues:<sup>1</sup>

For the first time in the history of this nation, as indicated by the 1960 Census, the paper handler now outnumbers the production worker. The total clerical work force is now slightly in excess of 20,500,000. It is equally significant that this total clerical work force is currently using an estimated 9,000,000 typewriters; 3,500,000 adding machines; 1,000,000 calculating machines; and outstandingly meaningful to the Electronic Era--over 14,000 punched card and electronic data processing and computer installations. The output of this tremendous clerical work force with their related equipment is housed and retained in an untold number of file cabinets and units of shelf filing and reel upon reel of tape and film stored information all of which occupies a number of millions of square feet of office space and requiring costly maintenance.

Many attempts have been made to assess the actual cost of filing and records management. One informal survey of a variety of companies indicated that file clerks handle between 1,000 and 2,000,000 items per month.<sup>2</sup> With this much activity, along with the cost of labor, equipment, space, and other overhead, it has been determined that the cost of retrieving only one misfiled paper may amount to \$61.23.

There has been much controversy among business educators concerning the amount of time that should be spent actually teaching filing. The variety of opinions ranges from the offering of a two-week course to that of a whole semester. One reason for this variety of opinions is

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<sup>1</sup> Stewart, Jeffrey R., "Filing and Records Management - Part 1," Business Education Forum, February, 1963, pp. 25-27.

<sup>2</sup>op. cit.

the difference in objectives from one school and community to another. It is up to the business teacher to discover what the filing needs are in offices in his or her community and then develop a filing course that fulfills those needs, whether it is for six days or six months.

#### Summary

Much of the research directly related to this study is concerned with office tasks and the business curricula in general, with only a cursory review of filing tasks. A similar study by Harley was more concerned with the various aspects of records management (rather than filing) and was done on a more limited basis than the present study.

All of the literature written by business educators and office managers points to a need for more communication between business educators and office managers so that filing instruction will be more realistic and relevant. There appears to be a need for more community surveys in which teachers actually visit offices and learn what their students will be doing when they enter the labor market.



## CHAPTER III

### PROCEDURES

#### Methods of Gathering Data

##### Introduction

Data for this study were gathered from three sources:

1. A questionnaire sent to records supervisors.
2. A questionnaire sent to office practice teachers in high schools.
3. A number of visits to offices to observe workers filing.

##### Developing the research instruments

Developing appropriate research instruments to gather the desired data was a three-phase process. First, information contained in two commonly used textbooks in high school filing classes<sup>1</sup> was summarized in checklist form. Then office visitations were made to observe file clerks to determine tasks not included in the checklist forms. Using this information, two questionnaires were developed (Appendixes A and B).

##### The questionnaires

A questionnaire was to be sent to records supervisors in offices to determine what file clerks in their companies actually do on their

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<sup>1</sup>Basset, et. al., Business Filing and Records Control, South-Western Publishing Company, Third Edition, and Kahn, et. al., Progressive Filing, McGraw-Hill Book Company, Eighth Edition.

jobs. Records supervisors were also asked to give their opinions on whether they thought it was important for file clerks to do the tasks listed on the questionnaire. Five business educators were asked to evaluate the questionnaire prior to its being sent.

A similar questionnaire was to be sent to high school office practice teachers to ascertain what textbooks are used and what is taught in filing. This questionnaire was also evaluated by five business educators before it was sent.

### The pilot study

A pilot study was conducted to identify strengths and weaknesses in the research procedures and to make necessary modifications before the actual study was conducted.

Five office practice teachers and five records supervisors were asked to complete one questionnaire and make any suggestions for improvement.

Several suggestions were made by the office practice teachers:

1. Make the questionnaire into one page if possible.
2. Make all questions multiple choice.
3. Make the directions more concise.
4. Send the questionnaires in the first week of October when teachers have more free time.
5. Send the questionnaires to a specific person and write a personal letter.
6. Change the title "Filing Teacher" to "Office Practice Teacher" since filing is usually taught in conjunction with office practice or a related class.

The records supervisors made the following suggestions:

1. Address the questionnaire to "Records Supervisor" rather than "Filing Supervisor."
2. Make the directions more concise.
3. Make all questions multiple choice.
4. In ranking qualifications, rank just 1-3, not 1-10.
5. Mail the questionnaires so that they are received in the middle of the week rather than at the beginning or end of the week.

#### Selecting the respondents

Two major groups of respondents were selected for the study:

1. Records supervisors in 104 companies ranging in size from 11 employees to 5,000 employees in the Benton Harbor - St. Joseph area (Appendix C).
2. Office practice teachers from 14 high schools in Berrien County, which is adjacent to the area of the selected companies (Appendix D).

Names and addresses of the companies to be included in this study were obtained from a directory compiled by the local Chamber of Commerce containing the names of all companies in this area with 11 employees or more. The total number of companies sent questionnaires was 104.

Office practice teachers in high schools were selected to participate in this study because they were involved in teaching filing and could best respond to the questionnaires. The high school teachers from the Berrien County area were selected because many of the students from these high schools would obtain employment with companies in the Benton Harbor - St. Joseph area.

## Collecting the Data

Collecting the data from respondents was accomplished using a direct-mail approach. A cover letter, questionnaire, and stamped reply envelope were sent to each participant (Appendix E). Two follow-up letters and questionnaires were sent to each person not returning the original questionnaire within a month after the first mailing (Appendix F and G).

Questionnaires received from records supervisors

As Table 1 below shows, 67 of the questionnaires sent to records supervisors were completed and returned. Of the 67 companies responding, 36 responded only after receiving a second or third follow-up letter and questionnaire.

TABLE 1

SUMMARY OF RESPONSES TO QUESTIONNAIRES  
SENT TO RECORDS MANAGERS

Questionnaires sent	104
Questionnaires returned	67
Percent of returns	64%

For the purposes of this study, the companies that responded to the questionnaires were categorized into the following size ranges:<sup>1</sup>

Very Small	11-25 employees
Small	26-100 employees

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<sup>1</sup>See "Definition of Terms" in this study.

Medium	101-500 employees
Large	501-1000 employees
Very Large	1001-5000 employees

Table 2 below shows that 24 of the 39 very small companies that were included in the study returned their questionnaires. Eighteen of the thirty small companies included in the study returned their questionnaires, as did eighteen of the twenty-eight medium-sized companies. All three of the large companies and all four of the very large companies included in the survey returned their questionnaires. (Appendix H contains a listing of companies by size and name.)

TABLE 2  
NUMBER OF RESPONSES RECEIVED FROM COMPANIES  
AS RELATED TO SIZE OF COMPANIES

Size of Company	Companies Sent Questionnaire	Companies Returning Questionnaire	Percent of Total Returns
Very Small	39	24	36
Small	30	18	27
Medium	28	18	27
Large	3	3	4
Very Large	4	4	6
Totals	104	67	100

Title of persons responding to questionnaires

The titles that were given of the persons who actually completed the questionnaires ranged from Accounting Manager to Vice President. In many small companies, the secretary served as file clerk and records supervisor. A complete summary of the titles of those responsible for records supervision in the companies surveyed is given in Table 3 below.

TABLE 3  
TITLES OF PERSONS RESPONDING  
TO QUESTIONNAIRE

Title Given by Person Responding to Questionnaire	Number of Companies Listing this Title	Percent of Total Response
Bookkeeper	1	2
Office Supervisor	22	51
Records Supervisor	3	7
Vice President	3	7
Secretary	3	7
Accounting Manager	2	5
No title given	9	21
Totals	43	100

Questionnaires received from office practice teachers

As Table 4 below shows, 13 of the 14 questionnaires sent to office practice teachers were completed and returned. A personal letter was sent as a cover letter to seven of the thirteen respondents (Appendix I). Two follow-up letters were sent to the only school not returning a questionnaire, and this questionnaire still was not returned (Appendix J and K).

TABLE 4

SUMMARY OF RESPONSES TO QUESTIONNAIRES  
SENT TO OFFICE PRACTICE TEACHERS

Total Questionnaires Sent	14
Total Questionnaires Returned	13
Percent of Returns	92%

Analyzing the Data

Introduction

Data were analyzed in two ways:

1. Information from the questionnaires received was computed by hand and reported in tables.
2. Where applicable, lists of items in the tables were made into rank-order lists and matched.

Information reported in tables

In general, all of the information obtained from the questionnaires was hand recorded and reported in tables. Other information pertinent

to this study, such as names and sizes of companies responding, are also reported in tables.

### Rank-order lists

The first rank-order list to be prepared was computed from the list of tasks performed by file clerks in offices. The ranking was computed by using the total number of file clerks performing a task and dividing it by the total number of companies responding to that question.<sup>1</sup> The items were ranked in importance of the highest number ranking item at the top of the list (Table 20, Page 49).

To compare the tasks done by file clerks with the type of training given to high school students, another rank-order list was computed. The rank-order list which was made of the tasks performed by file clerks was compared with a rank-order list prepared of the time spent teaching filing tasks in high schools (Table 29, Page 61). To compute the rank of the items taught in high school classes, the amount of time spent teaching items was assigned the following weighting factors:

No time spent	1
Less than 1 hour	2
1-2 hours	3
3-4 hours	4
More than 4 hours	5

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<sup>1</sup>Best, John W., Research in Education, Prentice-Hall, Inc., Second Edition, 1970, pp. 249-255.



The weighting factor was multiplied by the number of teachers responding to each time segment, and the total of these was added for a final total. The highest totals were ranked at the top of the list. Some items had exactly the same totals, and were ranked on the same line.

To compare the rank-order lists of tasks performed with tasks taught in class, the degree of mismatch<sup>1</sup> was computed as the difference between the rank-order numbers in the two lists; i.e., geographic filing was ranked as second on one list and nineteenth on another; thus the degree of mismatch was calculated as 17.

After the degree of mismatch was computed, four groups were compiled:<sup>2</sup>

Good Matches	Mismatch of 0-3
Fair Matches	Mismatch of 5-8
Poor Matches	Mismatch of 9-17
Irrelevant Mismatches	Mismatch of 5 or more which occurred because of a problem inherent in the items being matched; i.e., adhesive labels had a degree of mismatch of 8, but this was considered an irrelevant item because the amount of time spent teaching this item does not necessarily have to be great.

The rank-order listings of the tasks performed by file clerks as compared to tasks performed by filing students is not to be interpreted as a list of the items in order of importance because one list was

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<sup>1</sup>Degree of mismatch--relative difference between two statistics.

<sup>2</sup>See Definition of Terms.

compiled based on the amount of time spent teaching items while the other was based on the number of workers performing tasks. The only purpose of the rank-order lists being matched is to show the extent to which there is some relation between tasks taught and tasks performed on the job.

Another rank-order list was made of the lists of opinions of records supervisors and office practice teachers concerning what should be taught in filing (Table 33, Page 73 and Table 35, Page 77). To compute each list, the degrees of importance of all items were given the following weighting factors:

Very Important	3
Important	2
Unimportant	1

The weighting factors were multiplied by the number of persons responding to this degree of importance, and the total of these was added for a final total. This total was divided by the total number of respondents to the individual question, as the number of persons answering each question varied. The highest totals were ranked at the top of the list.

To compare the rank-order lists of opinions by the two groups of respondents, the degree of mismatch was calculated in the same manner as for the previous listing (Table 36, Page 79). In this case, there would be no irrelevant mismatches because the items being compared were the same, and all respondents were asked to give their opinions as to the importance of each item.

The tables containing the rank-order lists described in this section will be included in a later chapter of this study where they are used for discussion purposes.

## CHAPTER IV

### BACKGROUND INFORMATION CONCERNING THE JOB OF A FILE CLERK IN THE COMPANIES SURVEYED

#### Introduction

The purpose of this chapter is to discuss a section of the questionnaires sent to records supervisors dealing with background information concerning a file clerk's position within the company. Along with questions concerning what file clerks actually do on their jobs, respondents were asked some general questions concerning the nature of filing and the job of a file clerk within their companies besides the actual tasks performed on the job.

#### Number of Workers Employed as Full-Time File Clerks

As Table 5 on Page 30 shows, 40 of the 67 respondents reported that they employed 1-10 file clerks. Twenty-six respondents reported that there were no full-time clerks in their companies. One company responded that there were more than 30 persons employed as file clerks within their organization.

Several companies noted that their secretaries performed the task of filing because the companies were too small to employ a full-time file clerk. Other companies noted that while there were no listings of job titles of "file clerks" as such, there were persons employed who did the type of work described in the questionnaire.

One respondent noted: "We have only one person doing all filing. She has been with the company for over 40 years and does not wish to

retire, and we do not have enough filing to need a second person. Her methods are adequate BUT outdated in many ways."

TABLE 5  
NUMBER OF WORKERS EMPLOYED AS FILE CLERKS

Full-Time File Clerks	Companies Employing Full-Time File Clerks	Percent of* Total Response
0	26	39
1-10	40	60
11-20	--	--
21-30	--	--
More than 30	1	1
Total	67	100

\*Percentages have been rounded off.

Number of Workers Employed Full Time as File Clerks  
in Relation to Size of Companies Responding

Table 6 on Page 31 shows that 20 very small and six small companies responded that they employed no file clerks. Four very small companies, twelve small companies, eighteen medium-sized companies, three large companies, and three very large companies responded that they employed from 1-10 full time file clerks in their companies. One very large company reported that they employed more than thirty file clerks.

TABLE 6  
NUMBER OF WORKERS EMPLOYED AS FULL-TIME FILE CLERKS  
IN RELATION TO SIZE OF COMPANIES RESPONDING

Full-Time File Clerks	Size of Company	Number of Companies of Corresponding Size	Percent of Total Response
None	Very Small	20	30
	Small	6	9
	Very Small	4	6
1-10	Small	12	18
	Medium	18	27
	Large	3	4
	Very Large	3	4
More than 30	Very Large	1	2
Total		67	100

Qualifications Necessary to Become a File Clerk  
in a Particular Company and Rank of Importance

Of the qualifications listed on the questionnaire as necessary to become a file clerk in a particular company, 100 percent of the respondents listed accuracy as Very Important (Table 7, Page 32). Reading ability was listed as Very Important by 24 out of the 36 respondents, while 23 persons indicated that knowledge of the rules for alphabetic filing was Very Important. A complete rank-order list of the Very Important and Important responses is given in Tables 8 and 9, Pages 33 and 34.

**TABLE 7**  
**QUALIFICATIONS NECESSARY TO BECOME A FILE CLERK**  
**IN A PARTICULAR COMPANY AND RANK OF IMPORTANCE**

Qualifications	VERY IMPORTANT		IMPORTANT		UNIMPORTANT	
	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response
Reading ability	24	67	11	30	1	3
Knowledge of abbreviations	9	25	17	47	10	28
Accuracy	36	100	--	--	--	--
Good eyesight	13	36	19	53	4	11
Memory	14	39	17	47	5	14
Knowledge of rules for alphabetic filing	23	64	10	28	3	8
Personal qualities such as honesty, good character, and loyalty	12	33	17	47	7	20
Manual dexterity	6	16	15	42	15	42
Liking for detail	13	36	5	14	18	50

TABLE 8

RANK ORDER LIST OF "VERY IMPORTANT" QUALIFICATIONS  
NECESSARY TO BECOME A FILE CLERK IN A PARTICULAR COMPANY

Very Important Qualifications	Companies Responding	Percent of Total Response
Accuracy	36	100
Reading ability	24	67
Knowledge of rules for alphabetic filing	23	64
Memory	14	39
Good eyesight	13	36
Liking for detail	13	36
Personal qualities such as honesty, good character, and loyalty	12	33
Knowledge of abbreviations	9	25
Manual dexterity	6	16



TABLE 9  
RANK ORDER LIST OF "IMPORTANT" QUALIFICATIONS  
NECESSARY TO BECOME A FILE CLERK IN A PARTICULAR COMPANY

Important Qualifications	Companies Responding	Percent of Total Response
Good eyesight	19	53
Memory	17	47
Knowledge of abbreviations	17	47
Personal qualities such as honesty, good character, loyalty	17	47
Manual dexterity	15	42
Reading ability	11	30
Knowledge of rules for alphabetic filing	10	28
Liking for detail	5	14

Other qualifications not listed on the questionnaire, but written by respondents as important were:

1. Power of concentration
2. Conscientiousness
3. Neatness
4. Reliability to do filing promptly
5. Talent of being logical
6. Ability to take criticism and cheerfully service all requests accurately
7. Good common sense
8. Desire to file and knowledge that filing IS IMPORTANT

#### Initial Type of Training Given to a File Clerk

As Table 10 on Page 36 shows, 25 of 43 respondents indicated that working with the supervisor for on-the-job experience was the initial type of training given to a file clerk. Thirty respondents indicated that the initial type of training given to a file clerk consisted of learning by observation of the files and others. None of the respondents indicated that the file clerk was required to take an in-service course related to filing or a course in filing outside the company.

One comment was made on this item by a respondent that a replacement of the file clerk in their company would have to have secretarial ability. Another respondent commented that a replacement would have to have typing ability and more flexibility.

TABLE 10  
INITIAL TYPE OF TRAINING GIVEN TO A FILE CLERK

Type of Training Required	Companies Responding	Percent of Total Response
Works with supervisor for on-the-job experience	25	58
Takes in-service course within company	--	--
Takes course in filing outside company	--	--
Learns by observation of files and others	30	70

Note: Respondents answered more than one item.

#### Status of Job of File Clerk as Perceived by Respondents

How employers and employees perceive their job status and the job status of others is important in terms of the quality and quantity of work that will be done. If an employee envisions his job status as low and unimportant and is also given this impression by his employer, his level of achievement and sense of accomplishment will be lower than if his job were considered of a higher status within the company. Everyone likes to feel his job is important and that he has more than a low status within a company.

Of the 44 persons responding to the question of status, eight reported that they perceived that status of the job of a file clerk as "high" in their companies (Table 11, Page 37). Twenty-two

respondents stated that the status of file clerk was rated as in the "middle," while fourteen respondents listed the perceived status of a file clerk in their companies as "low."

TABLE 11  
STATUS OF JOB OF FILE CLERK  
AS PERCEIVED BY RESPONDENTS

Perceived Status of File Clerk	Companies Responding	Percent of Total Response
High	8	18
Middle	22	50
Low	14	32
Total	44	100

Status of Job of File Clerk as Perceived by Respondents  
in Relation to Size of Companies Responding

As Table 12 on Page 38 indicates, one small company, three medium-sized companies, one large company, and three very large companies responded that they perceived the status of the job of a file clerk as "high" in their companies.

Four very small companies, eight small companies, nine medium-sized companies, and one large company responded to this question with the perceived status of "middle" of file clerks within their companies.

Six small companies and six medium-sized companies perceived their file clerks' status as "low," as did one respondent from a large company and one respondent from a very large company.

TABLE 12  
STATUS OF JOB OF FILE CLERK  
AS PERCEIVED BY RESPONDENTS IN RELATION  
TO SIZE OF COMPANIES RESPONDING

Size of Company	P E R C E I V E D   S T A T U S					
	High	Percent of Total Response	Middle	Percent of Total Response	Low	Percent of Total Response
Very Small	--	--	4	8	--	--
Small	1	2	8	18	6	14
Medium	3	7	9	20	6	14
Large	1	2	1	2	1	2
Very Large	3	7	--	--	1	2

#### Types of Promotions Available for File Clerks

As shown in Table 13 on Page 39, eight companies were reported to have the position of "stenographer" available as a promotion for the file clerk. Twelve companies listed the position of "mail clerk" as a promotion. Nineteen respondents listed "clerk typist" as a promotion for the file clerk, while eighteen respondents listed "secretary" as one of the promotions available for a file clerk in their companies. Twenty-three respondents stated that the position of "general office clerk" was available as a promotion for the file clerk.

Because few office education programs train students to assume roles of file clerks exclusively, students in these vocational classes are prepared for a cluster of occupational skills which provide mobility and wide job entry skills.

TABLE 13  
TYPES OF PROMOTIONS AVAILABLE  
FOR FILE CLERKS

Promotions Available	Companies Responding	Percent of Total Response
Stenographer	8	19
Mail Clerk	12	28
Clerk Typist	19	44
Secretary	18	42
General Office Clerk	23	53

Note: Some respondents answered more than one item.

Types of Decisions File Clerks  
Make on their Jobs

Thirty-seven of the forty-three respondents listed "where to file something" as a decision that file clerks in their companies must make on their jobs (Table 14, Page 40). "Caption under which to file something" was listed by 34 respondents as a decision file clerks must make. Sixteen respondents listed "what will be filed" as a decision made by file clerks in their companies. File clerks in 14 companies decide whether to transfer files, while in 13 companies they decide how long to keep correspondence in the files.

Besides the listed decisions, the following responses were given of other decisions made by filing clerks: all filing decisions; no filing decisions.

TABLE 14  
TYPES OF DECISIONS FILE CLERKS  
MAKE ON THEIR JOBS

Decisions (Listed)	Companies Responding	Percent of Total Response
Where to file something	37	86
Caption under which to file something	34	79
What will be filed	16	37
Whether to transfer files	14	33
How long to keep correspondence in files	13	30

Note: Some respondents answered more than one item.

#### Method of Controlling Files

As indicated in Table 15 on Page 41, 22 respondents reported that the office supervisor controlled their files. Seven companies have file clerks controlling files, while seven other companies have files controlled by the general office manager. In four companies, the secretaries control the files; and in only three companies do records supervisors control the files.

#### Method of Controlling Files and Size of Companies Responding

As summarized in Table 16 on Page 42, the office supervisor controls the files in six very small companies, six small companies, seven medium-sized companies, one large company, and two very large

TABLE 15  
METHOD OF CONTROLLING FILES

Method of Control	Companies Using This Method of Control	Percent of Total Response
Office Supervisor	22	51
Records Supervisor	3	7
File Clerk	7	16
General Office Manager	7	16
Secretary	4	10
Total	<u>43</u>	<u>100</u>

companies. The records supervisor controls the files in two very small companies and one very large company. The file clerk is responsible for controlling the files in two very small companies, three small companies, and two medium-sized companies. The general office manager controls the files in three very small companies, two small companies, one medium-sized company, and one large company. In one very small company, two small companies, and one large company, the secretary controls the office files.

#### Type of Filing Arrangement

As Table 17 on Page 43 shows, there were twenty-three companies that reported having a centralized type of filing arrangement, while



TABLE 16  
METHOD OF CONTROLLING FILES AND  
SIZE OF COMPANIES RESPONDING

Method of Control	S I Z E   O F   C O M P A N I E S					Totals
	Very Small	Small	Medium	Large	Very Large	
Office Supervisor	6	6	7	1	2	22
Records Supervisor	2	--	--	--	1	3
File Clerk	2	3	2	--	--	7
General Office Manager	3	2	1	1	--	7
Secretary	1	2	1	--	--	4
Totals	<u>14</u>	<u>13</u>	<u>10</u>	<u>3</u>	<u>3</u>	<u>43</u>

eighteen companies reported having a decentralized filing arrangement. In some cases, respondents listed their companies as having both types of filing arrangements.

TABLE 17  
TYPE OF FILING ARRANGEMENT WITHIN COMPANIES

Type of Filing Arrangement	Companies with this Type of Arrangement	Percent of Total Response
Centralized	23	53
Decentralized	18	41

Note: Some companies reported to having both types of arrangements.

Type of Filing Arrangement and  
Size of Company Responding

The companies having a centralized filing system ranged in size from very small to very large, but no large companies responded to having this type of arrangement (Table 18, Page 44). A few of all of the different sized companies reported having a decentralized filing arrangement. Three companies responded as having both types of filing arrangements.

TABLE 18  
TYPE OF FILING ARRANGEMENT AND SIZE OF COMPANY RESPONDING

Type of Filing Arrangement	S I Z E   O F   C O M P A N I E S					Totals
	Very Small	Small	Medium	Large	Very Large	
Centralized	8	7	5	--	3	23
Decentralized	3	6	4	3	2	18
Totals	<u>11</u>	<u>13</u>	<u>9</u>	<u>3</u>	<u>5</u>	<u>41</u>

## CHAPTER V

### DETERMINING THE TASKS OF FILE CLERKS IN OFFICES

#### Introduction

To determine the tasks performed by file clerks in the companies surveyed, an analysis was made of the responses given by records supervisors on the questionnaires they completed. This chapter will be devoted to an analysis of those responses and will also report some of the duties of file clerks in these offices not necessarily related to filing.

#### Analysis of Responses Made by Respondents Concerning the Tasks Performed by File Clerks Within Companies

As shown in Table 19 on Pages 46 and 47, file clerks in most companies responding are responsible for sorting and reading correspondence. More than half of the respondents reported that file clerks in their companies are responsible for date and time stamping, cross referencing, and following up correspondence files.

Almost all of the respondents indicated that the alphabetic system of filing was used in their companies. Numeric and subject filing systems were used in more than half of the companies responding. Geographic filing was the system least used by file clerks in the responding companies.

Of the supplies used by file clerks, it was reported that more than 70 percent of the companies responding used forms, guides, tabs, labels, and folders in their offices for filing purposes.

TABLE 19  
ACTIVITIES OF FILE CLERKS IN OFFICES

Activities (Listed)	FILE CLERK USES OR DOES		FILE CLERK DOES NOT USE OR DO	
	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response
<u>PAPER PROCESSING</u>				
Date & Time Stamp	22	56	17	44
Sort	37	95	2	5
Code	18	46	21	54
Read	28	72	11	28
Release	12	31	27	69
Cross reference	23	59	16	41
Follow up	20	51	19	49
Requisition slips	9	23	30	77
Charge out slips	11	28	28	72
<u>FILING SYSTEMS USED</u>				
Alphabetic	38	97	1	3
Alpha-numeric	12	31	27	69
Geographic	7	18	32	82
Numeric	24	62	15	38
Subject	23	59	16	41
Commercial	9	23	30	77
<u>SUPPLIES USED</u>				
Forms	28	72	11	28
Guides	28	72	11	28

TABLE 19 (Page 2)  
ACTIVITIES OF FILE CLERKS IN OFFICES

Activities (Listed)	FILE CLERK USES OR DOES		FILE CLERK DOES NOT USE OR DO	
	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response
<u>SUPPLIES USED</u>				
Tabs	34	87	5	13
Gummed labels	34	87	5	13
Adhesive labels	30	77	9	23
Hanging folders	29	74	10	26
Manila folders	33	85	6	15
<u>EQUIPMENT USED</u>				
Open shelf	17	44	22	56
Power driven	4	10	35	90
Rotary	7	18	32	82
Sliding shelf	19	49	20	51
Vertical & roll	14	36	25	64
Visible card	22	56	17	44
<u>RECORDS MANAGEMENT</u>				
Microfilm documents	5	13	34	87
Retain records	34	87	5	13
Transfer records	28	72	11	28
Protect records	18	46	21	54
Maintain "dead files"	24	62	15	38

Sliding shelf and visible card files were used by more file clerks than any other type of equipment listed. Only 10 percent of the file clerks in the companies responding used power driven equipment.

Retaining and transferring of records was reported being done by file clerks in over 70 percent of the offices surveyed. Only 13 percent of the file clerks in the companies surveyed were responsible for microfilming.

A rank-order list of tasks performed by file clerks in offices is shown in Table 20 on Page 49.<sup>1</sup> The type of filing system which was most used in offices was alphabetic filing. The other filing systems used by companies were: numeric filing, subject filing, alpha-numeric filing, commercial filing systems, and geographic filing.

Some activities performed by file clerks that ranked high on the list of those performed in most companies were: sorting correspondence, retaining records, using tabs and gummed labels, and using manila folders.

In relation to records management, activities performed by more file clerks were: retaining records, transferring records, maintaining "dead files," and protecting records.

#### Duties of File Clerks Besides Filing

Of the other duties performed by file clerks, typing was reported as a duty of the file clerk by 39 of the 43 respondents (Table 21, Page 50). Thirty-four respondents indicated that file clerks used

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<sup>1</sup>Details concerning the compilation of the rank-order list are given in Chapter III under Procedures of this report.

TABLE 20

RANK-ORDER LIST OF TASKS PERFORMED BY FILE CLERKS IN OFFICES IN  
ORDER OF THE ONE DONE BY MOST COMPANIES SURVEYED

- 
- 
1. Doing alphabetic filing
  2. Retaining records, using tabs, using gummed labels\*
  3. Using manila folders
  4. Using adhesive labels
  5. Using hanging folders
  6. Transferring records, reading correspondence, using forms and guides\*
  7. Doing numeric filing
  8. Doing subject filing
  9. Date & Time stamping, using visible card file\*
  10. Following up files
  11. Using sliding shelf files
  12. Protecting records
  13. Coding correspondence for filing
  14. Using open shelf filing
  15. Using vertical and roll files
  16. Doing alpha-numeric filing, releasing information for filing\*
  17. Using charge out slips
  18. Using a commercial filing system, using requisition slips\*
  19. Doing geographic filing, using rotary files\*
  20. Microfilming documents
  21. Using power-driven equipment
- 

\*When computing rank, all items listed with this number ranked equally.



TABLE 21  
DUTIES OF FILE CLERKS BESIDES FILING

Duties	Companies Responding	Percent of Total Response
Typing	39	91
Microfilming	2	5
Sorting and opening mail	24	56
Using copying machine	34	79
General office assistant	34	79
Bookkeeping	2	5
Recordkeeping	2	5
General secretarial duties	3	7
Answering telephone	3	7
Receptionist	2	5
Invoicing	1	2
Summarizing cost of jobs	1	2
All other office duties	2	5

the copying machines and served as general office assistants. In 24 companies, file clerks sort and open the mail. Only two respondents listed microfilming as a duty of the file clerk.

Other duties of a file clerk not listed on the questionnaire, but listed by respondents, were:

1. Bookkeeper
2. Recordkeeper
3. General secretarial duties
4. Answering telephone
5. Receptionist
6. Invoicing
7. Summarizing cost of jobs
8. All other office duties

In a study done concerning the types of tasks performed by office workers on their jobs, it was found that tasks are done in clusters or groups rather than one job having one specific task associated with it.<sup>1</sup> This cluster concept can easily be seen in relation to the job of a file clerk when reviewing the variety of tasks performed by file clerks as given in Table 21 on Page 50.

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<sup>1</sup>Perkins, Edward A., Jr., Byrd, F., Ross, Roley, and Dennis, E., "Clusters of Tasks Associated with Performance of Major Types of Office Work," National Business Education Quarterly, March, 1968, pages 20-22, 55.

## CHAPTER VI

### DETERMINING WHAT IS TAUGHT IN HIGH SCHOOL FILING CLASSES

#### Introduction

To determine what is taught in filing in the high schools surveyed, an analysis was made of the responses given by office practice teachers to certain items on the questionnaires they completed. This chapter reports their responses to these questions and also gives information concerning answers to general questions concerning filing as taught in these schools.

#### Where in the Business Curriculum Filing Is Taught

Table 22 below shows that 12 office practice teachers responded that filing was taught as part of an office practice class. Two teachers responded that filing was taught as part of another class, while one teacher reported that filing was taught as a separate course.

TABLE 22

#### WHERE IN THE BUSINESS CURRICULUM FILING IS TAUGHT

Type of Course	Teachers Responding
As a separate course	1
As part of an office practice class	12
As part of another class	2

Note: Some teachers checked more than one answer.

Grade Level in High School  
Where Filing Is Taught

Table 23 below shows that eleven teachers responded that filing was taught in the twelfth grade. Eight teachers responded that filing was taught in the eleventh grade. Only one teacher responded that filing was taught in the tenth grade.

Some teachers responded that filing was not limited to a grade level, but that two or three different levels of students could be in a particular filing class.

TABLE 23

GRADE LEVEL IN HIGH SCHOOL  
WHERE FILING IS TAUGHT

Grade Level	Teachers Responding
Grade 10	1
Grade 11	8
Grade 12	11

Note: Some teachers checked more than one answer.

Teaching Methodologies Used to Teach Filing

Table 24 on Page 54 shows that 12 teachers used the practical application as one of their methods of teaching filing. Seven teachers said they used the lecture method, while six teachers used the discussion method. One teacher noted that she used an individualized

approach to teach filing where students worked at their own pace.  
Two teachers indicated using the rotation method of teaching filing.

TABLE 24  
TEACHING METHODOLOGIES USED  
IN TEACHING FILING

Methodology Used	Teachers Responding
Lecture	7
Discussion	6
Practical application	12
Individualized instruction	1
Rotation plan	2

Note: Some teachers checked more than one answer.

#### Supplementary Materials Used to Teach Filing

When asked what type of supplementary materials the teachers used in teaching filing, 12 teachers responded that they used a practice set (Table 25, Page 55). Three teachers responded that they used file cards, and one teacher responded that a workbook was used.

#### Types of Evaluations Given by Teachers to Students in Filing Classes

Ten office practice teachers responded that they used teacher-made tests in their filing classes (Table 26, Page 55). Standardized

tests were used in eight filing classes. Three teachers reported that they used part of the Civil Service exam as an evaluation in their filing classes.

TABLE 25  
SUPPLEMENTARY MATERIALS USED IN TEACHING FILING

Materials Used	Teachers Responding
Workbook	1
File cards	3
File boxes	1
Practice set	12

Note: Some teachers responded to more than one answer.

\*\*\*\*

TABLE 26  
TYPES OF EVALUATIONS GIVEN BY  
TEACHERS TO STUDENTS IN FILING

Types of Evaluations	Teachers Responding
Teacher-made tests	10
Standardized tests	8
Employment application tests	1
Part of Civil Service tests	3

Note: Some teachers responded to more than one answer.

### Time Spent Teaching Filing

When asked how much time they spent teaching filing, four teachers reported that they spent 31-45 hours of class time teaching filing (Table 27 below). Four teachers indicated that they spent 21-30 hours teaching filing, while four other teachers responded that they spent 11-20 hours teaching filing. There were not any teachers who indicated that they spent more than 45 hours teaching filing.

TABLE 27  
TIME SPENT TEACHING FILING

Number of Hours	Teachers Responding
10 or less	1
11 - 20	4
21 - 30	4
31 - 45	4
Total	13

### Tasks and Topics Taught in Filing and Amount of Time Spent on Each

To discover what is taught in filing in the high schools surveyed, teachers were asked to indicate how much time they spent

teaching each item from a list given to them in the questionnaires they completed.

As can be observed in Table 28 on Pages 58 and 59, most of the office practice teachers responding reported that they spent less than one hour covering date and time stamping, reading, inspecting, coding, releasing, charge out, and follow up.

More than four hours was indicated as the amount of time spent teaching alphabetic filing by seven teachers, while five teachers spent three to four hours teaching alphabetic filing. Geographic filing ranked second to alphabetic filing in the amount of time teachers spent covering it in class.

Most teachers indicated spending two hours or less going over forms, guides, tabs, gummed labels, adhesive labels, hanging folders, and manila folders.

Less than one hour was spent by most of the office practice teachers covering open shelf, power driven, and rotary files. Some teachers indicated spending up to two hours covering visible card files.

Four teachers responded that they did not teach microfilming, records retention, records transfer, and records protection; while the rest of the teachers responding to this item said they spent two hours or less covering each of these topics.

#### Ranking of Tasks Taught in High School Filing Classes

A rank-order list of tasks taught in high school filing classes according to the amount of time spent on them was computed from the



TABLE 28  
TIME SPENT TEACHING SPECIFIED ACTIVITIES IN FILING

Activities	AMOUNT OF TIME SPENT BY TEACHERS TEACHING ITEMS				
	Not Taught	Less than 1 hour	1-2 hours	3-4 hours	More than 4 hours
<u>PAPER PROCESSING</u>					
Date & Time					
Stamping	--	11	1	--	--
Reading	--	8	4	--	--
Inspecting	--	7	5	--	--
Coding	--	8	4	--	--
Releasing	1	8	3	--	--
Charge out	1	8	3	--	--
Follow up	1	8	3	--	--
<u>FILING SYSTEMS</u>					
Alphabetic	--	--	--	5	7
Alpha-numeric	3	1	5	2	1
Geographic	--	--	6	3	3
Numeric	1	2	4	3	2
Subject	1	--	4	4	3
Commercial	4	3	2	2	1
<u>USING SUPPLIES</u>					
Forms	2	7	3	--	--
Guides	1	9	2	--	--
Tabs	1	9	2	--	--
Gummed labels	3	8	1	--	--
Adhesive labels	3	8	1	--	--

TABLE 28 (Page 2)

## TIME SPENT TEACHING SPECIFIED ACTIVITIES IN FILING

Activities	AMOUNT OF TIME SPENT BY TEACHERS TEACHING ITEMS				
	Not Taught	Less than 1 hour	1-2 hours	3-4 hours	More than 4 hours
USING SUPPLIES					
Hanging folders	2	9	1	--	--
Manila folders	2	9	1	--	--
USING EQUIPMENT					
Open shelf	1	11	--	--	--
Power driven	1	11	--	--	--
Rotary	1	11	--	--	--
Sliding shelf	1	10	1	--	--
Vertical & roll	1	10	1	--	--
Visible card	1	8	3	--	--
RECORDS MANAGEMENT					
Microfilming	4	5	3	--	--
Records retention	4	4	4	--	--
Records transfer	4	4	4	--	--
Records protection	4	4	4	--	--

information received in the questionnaires from the office practice teachers.<sup>1</sup> The purpose of this list is to show on which items the most time is spent teaching in high school filing classes. This list does not suggest any ranking of importance, but only shows which items are taught in the order of the most time spent on each item. Several items were ranked at the same level because the same amount of time was spent teaching them.

As Table 29 on Page 61 shows, all of the filing systems mentioned on the questionnaire ranked at the top of the list, with alphabetic filing ranking first. Most of the teachers' time was spent teaching filing rules, while very little class time was devoted to developing and operating information systems. It should be observed that most of the other items are clustered in groups of several items to a line indicating that the same amount of time was spent on them in filing classes.

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<sup>1</sup>For computation of the rank-order list, refer to Chapter III of this study on Procedures.

TABLE 29

RANK-ORDER LIST IN DESCENDING ORDER OF ITEMS  
TIME IS SPENT TEACHING IN FILING CLASSES

- 
- 
1. Alphabetic filing
  2. Geographic filing
  3. Subject filing
  4. Numeric filing
  5. Alpha-numeric filing
  6. Commercial filing systems
  7. Coding, reading correspondence\*
  8. Releasing, charge out, follow up\*
  9. Date & time stamp, forms, guides, tabs,  
records transfer\*
  10. Records retention, records protection, sliding  
shelf files, vertical & roll files, visible  
card files\*
  11. Open shelf filing, microfilming, rotary equipment,  
power-driven equipment, hanging folders, manila  
folders\*
  12. Gummed labels, adhesive labels\*
- 

\*When computing rank, all items listed with this number  
ranked equally.

## CHAPTER VII

### DETERMINING THE RELATIONSHIP BETWEEN TEXTBOOK INSTRUCTIONAL MATERIAL AND THE INSTRUCTIONAL PROCESS IN THE CLASSROOM

#### Introduction

To determine the relationship between textbook instructional material and the instructional process in the classroom, the responses given by teachers to the questionnaires that they completed were analyzed. A summary is given in this section.

#### Filing Textbooks Used by High School Teachers

The two textbooks which this study is based on, Business Filing and Records Control and Progressive Filing,<sup>1</sup> were reported to be used in high school filing classes by nine of the thirteen office practice teachers who responded to the questionnaires in this study (Table 30, Page 63).

Two teachers reported that they used Secretarial Office Practice,<sup>2</sup> and General Office Practice<sup>3</sup> was reported to be used by two high school office practice teachers.

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<sup>1</sup>Basset, et. al., Business Filing and Records Control, South-Western Publishing Company, Third Edition, and Kahn, et. al., Progressive Filing, McGraw-Hill Book Company, Eighth Edition.

<sup>2</sup>Pendery, John A., and Woodward, Theodore, Secretarial Office Practice, South-Western Publishing Company, Fifth Edition.

<sup>3</sup>Pendery, John A., and Woodward, Theodore, General Office Practice, South-Western Publishing Company, Fifth Edition.

Several teachers responded that they used two different textbooks, while two teachers responded that they did not use any textbooks at all in their filing classes.

TABLE 30  
FILING TEXTBOOKS USED BY  
HIGH SCHOOL TEACHERS

Name of Textbook	Teachers Responding	Percent of Total Response
Business Filing and Records Control	7	54
Progressive Filing	1	8
Secretarial Office Practice	2	15
General Office Practice	2	15
No Textbook Used	2	15

Note: Several teachers responded to using more than one textbook.

#### Time Spent Teaching Specific Tasks and Topics in Filing

From the rank-order list of items compiled in the last section of this study (Table 29, Page 61), the list of items taught in filing classes can be compared to the material covered in the two filing textbooks previously mentioned. Since all of the items in the rank-order list are contained in the two textbooks, it can be concluded that teachers do teach the material covered in the two textbooks to a great extent. It should also be noted that the items at the top of the rank-

order list, alphabetic filing, geographic filing, and subject filing, are covered to a greater extent in the textbooks than some of the other items on the list.

## CHAPTER VIII

### COMPARING TASKS DONE BY FILE CLERKS WITH TRAINING GIVEN TO HIGH SCHOOL FILING STUDENTS

#### Introduction

To compare the tasks done by file clerks on their jobs with the training given to high school filing students, rank-order lists of the tasks performed by file clerks on their jobs and students in filing classes which have already been referred to were matched.

#### Summary of Tasks Done by File Clerks

In Chapter 5 the tasks done by file clerks were analyzed in detail. Reference will be made to this information again in this section briefly as an aid to understanding the comparison that will be made in this chapter.

Table 20 on Page 49 contains a rank-order list of all tasks performed by file clerks in the offices surveyed; Table 19 on Pages 46 and 47 contains a detailed description of the responses of the office supervisors from the various companies to this part of the questionnaire. Some tasks which ranked at the top of the lists of tasks performed by file clerks were: alphabetic filing, retaining records, using tabs, using gummed and adhesive labels, using manila and hanging folders, transferring records, using forms and guides, and reading correspondence. Some tasks which ranked at the bottom of the list were: doing geographic filing, using rotary files, microfilming documents, and using power-driven equipment.



## Summary of Training Given to High School Filing Students

Chapter 6 gives a detailed analysis of the tasks performed by high school filing students and also contains a rank-order listing of the items taught according to the amount of time spent on each item.

As Table 29 on Page 61 shows, all of the filing systems included on the questionnaire sent to the teachers were ranked at the top of the list according to the time spent teaching them in filing classes. Items related to paper processing, coding, reading and releasing correspondence were ranked next in order of time spent teaching them in filing class. The items at the very bottom of the list, the ones the least amount of time was spent on, were gummed and adhesive labels.

### Comparison of Tasks Done by File Clerks to Those Done by Filing Students

To compare the rank-order lists of tasks performed by file clerks to the rank-order list of tasks taught in high school filing classes, the degree of mismatch was computed.<sup>1</sup> Table 31 on Page 67 shows the results of the mismatching of items from the two rank-order lists.

In the good matches, the tasks performed by file clerks closely corresponded to those taught in filing classes. Items could have been at either end of the ranking scale to be included in this list. For example, alphabetic filing was ranked at the top in both lists, whereas date and time stamping was ranked as ninth on each list.

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<sup>1</sup>See Chapter 3 on Procedures for computation of this table.

TABLE 31

MATCHING OF RANK-ORDER LISTS OF TASKS PERFORMED  
BY FILE CLERKS AND THOSE TAUGHT IN HIGH SCHOOL FILING CLASSES

Good Matches	Fair Matches	Poor Matches	Irrelevant Mismatches
Alphabetic filing	Coding correspondence	Alpha-numeric filing	Adhesive labels
Date & time stamping	Records retention	Charge out	Gummed labels
Follow up	Releasing correspondence	Commercial filing systems	Hanging folders
Numeric filing	Rotary files	Geographic filing	Manila folders
Open shelf filing	Subject filing	Microfilming	Tabs
Reading correspondence	Vertical & roll files	Power-driven equipment	
Records protection			
Sliding shelf files			
Transferring records			
Using forms & guides			
Visible card files			

The fair matches were those where the items being compared differed by more than three points on the ranking scale. For example, records retention was second on the list of tasks performed by file clerks and tenth on the lists of tasks learned or done by filing students.

The poor matches were those where the items being compared differed by more than eight points on the ranking scale. For example, alpha-numeric filing was ranked as sixteenth on one list and fifth on the other.

The irrelevant mismatches were those where a difference of five or more occurred in the matching; but because of the nature of the items being matched on this type of scale, they were considered irrelevant. For example, using gummed labels was second on the list of tasks performed by file clerks and twelfth on the list of items taught in high school filing classes. These items could not be matched because the amount of time spent teaching them could be very little and yet the number of file clerks who perform these tasks are very high.

A major difference in comparing the two rank-order lists of tasks performed is that the list of tasks performed by file clerks has most items ranked individually, whereas the other list has many items grouped in clusters toward the bottom of the ranking.

One significant difference between tasks performed by the two groups was in geographic filing. While teachers spend a lot of time teaching geographic filing, the file clerks surveyed do very little geographic filing. Alpha-numeric filing and commercial filing systems fell into the same category.

## CHAPTER IX

### COMPARING WHAT RESPONDENTS FROM INDUSTRIES AND OFFICE PRACTICE TEACHERS THINK IS IMPORTANT TO BE TAUGHT IN HIGH SCHOOL FILING CLASSES

#### Introduction

Before comparing the opinions of the respondents from industry and office practice teachers concerning what they think should be taught in filing, a summary will be given of the opinions of each group individually.

#### Opinions of Respondents from Industry of Importance of Teaching Filing Activities Listed on Questionnaires

As shown in Table 32 on Pages 70 and 71, less than half of the respondents from industry thought teaching the following items was very important: date and time stamping, coding, reading, releasing, and cross referencing.

Most of the filing systems listed were considered important, rather than very important to teach.

The supplies listed were considered very important to teach about by half of the respondents or less. Several respondents considered teaching about these supplies as unimportant.

Over 70 percent of the respondents from industry considered teaching about the various kinds of equipment for filing very important.

The records management topics were considered either important or very important to teach by over half of the respondents.

TABLE 32

OPINIONS OF RESPONDENTS FROM INDUSTRY OF IMPORTANCE OF  
TEACHING FILING ACTIVITIES LISTED ON QUESTIONNAIRE

Activities	VERY IMPORTANT		IMPORTANT		UNIMPORTANT	
	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response
<b><u>PAPER PROCESSING</u></b>						
Date & time stamp	8	29	6	21	14	50
Sort	14	50	10	36	4	14
Code	12	43	7	25	9	32
Read	11	39	12	43	5	18
Release	8	32	6	24	11	44
Cross reference	10	36	14	50	4	14
Follow up	11	41	10	37	6	22
Requisition slips	12	44	4	15	11	41
Charge out	12	44	5	18	11	39
<b><u>FILING SYSTEMS</u></b>						
Alphabetic	7	24	21	72	1	4
Alpha-numeric	9	26	12	48	4	16
Geographic	10	40	8	32	7	28
Numeric	6	22	17	63	4	15
Subject	9	35	13	50	4	15
Commercial	11	46	6	25	7	29
<b><u>SUPPLIES</u></b>						
Forms	13	46	8	29	7	25
Guides	13	48	7	26	7	26
Tabs	10	37	9	33	8	30

TABLE 32 (Page 2)

OPINIONS OF RESPONDENTS FROM INDUSTRY OF IMPORTANCE OF  
TEACHING FILING ACTIVITIES LISTED ON QUESTIONNAIRE

Activities	VERY IMPORTANT		IMPORTANT		UNIMPORTANT	
	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response	Companies Responding	Percent of Total Response
<b><u>SUPPLIES</u></b>						
Gummed labels	10	37	7	26	10	37
Adhesive labels	9	33	9	30	10	37
Hanging folders	13	47	6	21	9	32
Manila folders	13	45	7	24	9	31
<b><u>EQUIPMENT</u></b>						
Open shelf	18	70	4	15	4	15
Power driven	19	76	2	8	4	16
Rotary	18	70	3	12	5	18
Sliding shelf	18	74	7	25	3	11
Vertical & roll	18	72	3	12	4	16
Visible card	21	78	2	7	4	15
<b><u>RECORDS MANAGEMENT</u></b>						
Microfilming	16	55	10	35	3	10
Retain records	11	38	14	48	4	14
Transfer records	14	48	12	41	3	11
Protect records	12	41	12	41	5	18
Maintain "dead files"	13	48	9	33	5	19

The responses given in detail in Table 32 were compiled and a rank-order listing was made of the items that were thought to be important to teach in order of importance, with the most important items ranked at the top of the list (Table 33, Page 73).

Some items that ranked highest in order of importance to teach by respondents from industry were: visible card files, power-driven equipment, vertical and roll files, sliding shelf files, rotary files, and microfilming documents.

Some items that ranked lowest on the list of those thought important to teach were: charge out slips, gummed and adhesive labels, and date and time stamping.

It is interesting to note that alphabetic filing ranked eleventh on this list, but was one of the most commonly used filing systems.

Opinions of High School Office Practice Teachers  
Regarding the Importance of Teaching the  
Filing Activities Listed on the Questionnaires

As can be observed in Table 34 on Pages 74 and 75, very few of the office practice teachers considered teaching about date and time stamping, reading, inspecting, releasing, charge out, and follow up as very important, although a larger number thought these items were important to teach.

Most of the teachers thought alphabetic filing was very important to teach, while several of the other filing systems were considered either important or very important. Commercial filing systems were considered unimportant to teach about by over half of the teachers.

TABLE 33

RANK-ORDER LIST OF ITEMS THOUGHT TO BE  
OF IMPORTANCE BY BUSINESS RESPONDENTS  
IN DESCENDING ORDER OF IMPORTANCE

- 
- 
1. Visible card files
  2. Power-driven equipment
  3. Vertical & roll files
  4. Open shelf files
  5. Sliding shelf files
  6. Rotary files
  7. Microfilming documents
  8. Transferring records
  9. Retaining records
  10. Reading correspondence, using forms and guides\*
  11. Alphabetic filing
  12. Alpha-numeric filing
  13. Subject filing
  14. Commercial filing systems
  15. Follow up, hanging folders, manila folders\*
  16. Geographic filing, coding\*
  17. Numeric filing, tabs\*
  18. Requisitions, adhesive labels\*
  19. Charge out forms\*
  20. Gummed labels
  21. Releasing correspondence for filing
  22. Date and time stamping
- 
- 

\*When computing rank, all items listed with this number ranked equally.



TABLE 34

OPINIONS OF HIGH SCHOOL OFFICE PRACTICE TEACHERS REGARDING  
THE IMPORTANCE OF TEACHING FILING ACTIVITIES LISTED ON QUESTIONNAIRES

Activities	VERY IMPORTANT		IMPORTANT		UNIMPORTANT	
	Teachers Responding	Percent of Total Response	Teachers Responding	Percent of Total Response	Teachers Responding	Percent of Total Response
<u>PAPER PROCESSING</u>						
Date & time stamp	3	22	6	46	4	30
Read	4	30	7	53	2	15
Inspect	4	30	8	61	1	7
Code	6	46	5	38	2	15
Release	4	30	7	53	2	15
Charge out	3	22	8	61	2	15
Requisitions	4	30	6	46	3	22
Follow up	2	15	8	61	3	22
<u>FILING SYSTEMS</u>						
Alphabetic	12	92	1	7	--	--
Alpha-numeric	4	30	7	53	2	15
Geographic	4	30	8	61	1	7
Numeric	5	38	8	61	--	--
Subject	5	38	8	61	--	--
Commercial	1	7	5	38	7	53
<u>SUPPLIES</u>						
Forms	2	15	10	76	1	7
Guides	4	30	9	69	--	--
Tabs	2	15	10	76	1	7

TABLE 34 (Page 2)

OPINIONS OF HIGH SCHOOL OFFICE PRACTICE TEACHERS REGARDING  
THE IMPORTANCE OF TEACHING FILING ACTIVITIES LISTED ON QUESTIONNAIRES

Activities	VERY IMPORTANT		IMPORTANT		UNIMPORTANT	
	Teachers Responding	Percent of Total Response	Teachers Responding	Percent of Total Response	Teachers Responding	Percent of Total Response
<u>SUPPLIES</u>						
Gummed labels	1	7	8	61	4	30
Adhesive labels	1	7	8	61	4	30
Hanging folders	1	7	8	61	4	30
Manila folders	2	15	7	53	4	30
<u>EQUIPMENT</u>						
Open shelf	--	--	10	76	3	22
Power driven	--	--	10	76	3	22
Rotary	1	7	9	69	3	22
Sliding shelf	--	--	10	76	3	22
Vertical & roll	1	7	9	69	3	22
Visible card	1	7	10	76	2	15
<u>RECORDS MANAGEMENT</u>						
Microfilming	--	--	8	61	5	38
Records retention	4	30	6	46	3	22
Records transfer	4	30	7	53	2	15
Records protection	4	30	6	46	3	22

Of the supplies listed, most of the teachers thought they were important to teach in filing classes.

Very few of the teachers considered it very important to teach about the equipment listed, although quite a few thought some of the equipment was important to teach.

When asked about microfilming, none of the teachers considered this topic very important to teach, but it was considered important by 60 percent of the teachers. The other records management topics were thought to be either very important or important by over 70 percent of the teachers responding.

The responses given in detail in Table 34 were compiled and a rank-order list was made of the items that were considered important to teach in order of importance, with the most important items ranked at the top of the list (Table 35, Page 77).

Alphabetic, numeric, and subject filing all ranked at the top of the list of items office practice teachers considered important to teach in filing.

At the bottom of the rank-order list of items thought to be important to teach were microfilming and commercial filing systems.

Comparison of Opinions of Office Practice Teachers  
to Those of Respondents from Industries Concerning  
What Should Be Taught in High School Filing Classes

In order to compare opinions of what office practice teachers and respondents from industries think should be taught in filing, the two rank-order lists previously mentioned were compared.<sup>1</sup>

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<sup>1</sup>See Chapter 3 on Procedures in this study.

TABLE 35

RANK-ORDER LIST OF ITEMS THOUGHT TO BE OF IMPORTANCE  
TO TEACH BY HIGH SCHOOL OFFICE PRACTICE TEACHERS  
IN DESCENDING ORDER OF IMPORTANCE

- 
- 
1. Alphabetic filing
  2. Numeric filing, subject filing\*
  3. Guides, coding\*
  4. Geographic filing
  5. Alpha-numeric filing, reading, releasing,  
records transfer\*
  6. Charge out, requisitions, tabs, forms\*
  7. Date & time stamp, follow up, visible card  
files, records retention, records protection\*
  8. Manila folders, rotary files, vertical & roll  
files\*
  9. Gummed labels, adhesive labels, hanging folders,  
open shelf files, sliding shelf files, power-driven  
equipment\*
  10. Microfilming
  11. Commercial filing systems
- 

\*When computing rank, all items listed with this number ranked  
equally.

Table 36 on Page 79 shows that office practice teachers and respondents from industry had a number of good matches--items in which their opinions were in agreement. Some of these items were: microfilming, records transfer, records retention, and records protection.

The fair matches consisted of items where there was more of a disparity between items on the two rank-order lists. Some of the fair matches were: visible card files, alphabetic filing, alpha-numeric filing, hanging folders, and manila folders.

There were several items which teachers and respondents from industries disagreed--the poor matches. Some of the poor matches were: subject filing, geographic filing, numeric filing, and coding.

TABLE 36

MATCHING OF RANK-ORDER LISTS OF OPINIONS OF RESPONDENTS  
FROM INDUSTRY AND HIGH SCHOOL OFFICE PRACTICE TEACHERS  
CONCERNING WHAT IS IMPORTANT TO TEACH IN FILING

GOOD MATCHES	FAIR MATCHES	POOR MATCHES
Vertical & roll files	Visible card files	Subject filing
Open shelf filing	Guides	Geographic filing
Rotary files	Alphabetic filing	Numeric filing
Microfilming	Alpha-numeric filing	Tabs
Records transfer	Follow up	Requisitions
Records protection	Hanging folders	Gummed labels
Reading	Manila folders	Charge out
Forms	Adhesive labels	Release
Commercial filing systems		Date & time stamp
Sliding shelf files		Coding

## CHAPTER X

### SUMMARY OF FINDINGS

The first section of the summary of findings is devoted to describing background information concerning the job of a file clerk in the companies surveyed. The second section is a summary of the tasks actually performed by file clerks on their jobs. The third section is a summary of what is taught in high school filing classes. The fourth section is a comparison of tasks done by file clerks with training given to high school filing students. The fifth section is a summary of the comparison of the opinions of office practice teachers and respondents from industry concerning what is important to teach in filing.

#### Background Information Concerning the Job of a File Clerk in the Companies Surveyed

Forty of the 67 respondents from industry reported having 1-10 full-time file clerks in their companies; one company reported having more than 30 full-time file clerks employed in their company.

In relating the number of workers employed as file clerks to the size of companies responding, it was found that the company with more than 30 full-time file clerks was a very large company. The other companies having 1-10 full-time file clerks ranged from very small to very large.

Of the qualifications necessary to become a file clerk in a company, accuracy was listed as most important by all respondents.

Other qualifications which were considered important were: reading ability, knowledge of rules for alphabetic filing, memory, liking for detail, good eyesight, and personal qualities such as honesty, good character, and loyalty.

When asked about the type of training given to file clerks on the job, the two responses were learning about filing by observation of the files and others and working with the supervisor for on-the-job experience.

The status of file clerks in companies was considered in the middle category by most respondents, although there were several who thought the status of the file clerks in their companies was low and a few respondents who stated the status of file clerks in their companies was high.

In relating the status of a file clerk to the size of companies responding, it was found that the responses did not fall into any particular category--all sizes of companies responded as having the status of file clerks either low, medium, or high.

When asked about promotions available to file clerks, respondents' answers ranged from the position of clerk typist to that of secretary.

File clerks in most of the companies surveyed were required to make decisions concerning filing. Some of these decisions were: where to file something, what will be filed, whether to transfer files, and how long to keep correspondence in the files. In some companies file clerks were required to make all filing decisions.

The method of controlling files in companies varied from an office supervisor controlling the files to a secretary controlling them.



In relating the method of controlling files to the size of the companies responding, it was found that there were a variety of responses--office supervisors controlled the files in small and large companies, as did secretaries.

The companies responding to this survey had both centralized and decentralized types of filing arrangements. Some companies had both types of arrangements.

The companies having a centralized filing system ranged in size from very small to very large, but no large companies responded to having this type of arrangement. A few of all of the different sized companies reported having a centralized filing arrangement.

#### Tasks Performed by File Clerks on their Jobs

The following is a list in descending order of tasks performed by the most file clerks in the companies surveyed:

1. Doing alphabetic filing
2. Retaining records, using tabs, using gummed labels\*
3. Using manila folders
4. Using adhesive labels
5. Using hanging folders
6. Transferring records, reading correspondence, using forms and guides\*
7. Doing numeric filing
8. Doing subject filing
9. Date and time stamping, using visible card files\*

---

\*Items on the same line were done by the same number of file clerks.

10. Following up of files
11. Using sliding shelf files
12. Protecting records
13. Coding correspondence for filing
14. Using open shelf files
15. Using vertical and roll files
16. Doing alpha-numeric filing, releasing information for filing\*
17. Using charge-out slips
18. Using a commercial filing system, using requisition slips\*
19. Doing geographic filing, using rotary files\*
20. Microfilming documents
21. Using power-driven equipment

File clerks in the companies surveyed were required to do other tasks besides filing. Duties of file clerks other than filing given by respondents were:

1. Typing
2. Using the copying machine
3. Acting as a general office assistant
4. Sorting and opening mail
5. General secretarial duties
6. Answering the telephone
7. Microfilming documents
8. Bookkeeping
9. Recordkeeping

---

\*Items on the same line were done by the same number of file clerks.

10. Being receptionist
11. Invoicing
12. Summarizing cost of jobs
13. All other office duties

#### Filing as Taught in the High Schools Surveyed

When asked where in the business curriculum filing was taught, only one teacher responded that filing was taught as an individual course. Most teachers responded that filing was taught as part of an office practice class.

In the high schools surveyed, filing was taught to students in the tenth, eleventh, and twelfth grades. In some schools students from all of these grades were in one class, and in other schools only one grade level was taught filing.

Most teachers responding said they used the practical application approach as their method of teaching filing. Other methods used were: lecture, discussion, rotation plan, and individualized approach.

A practice set was used by most of the filing teachers responding. Some teachers used just file cards and file boxes, and one teacher indicated using a workbook.

Most teachers said they made up their own tests for evaluation purposes in filing. Other materials used for evaluation were: standardized tests, employment application tests, and part of the Civil Service exam.

When asked how much time was spent teaching filing, the responses were divided: four teachers spent 31-45 hours; four teachers spent

21-30 hours; four teachers spent 11-20 hours; and one teacher spent 10 hours or less.

Tasks and topics taught in filing classes in the schools surveyed are listed below in descending order according to the amount of time spent teaching them in class:

1. Alphabetic filing
2. Geographic filing
3. Subject filing
4. Numeric filing
5. Alpha-numeric filing
6. Commercial filing systems
7. Coding, reading correspondence\*
8. Releasing, charge out, and follow up\*
9. Date & time stamp, forms, guides, tabs, records transfer\*
10. Records retention, records protection, sliding shelf files, vertical and roll files, visible card files\*
11. Open shelf filing, microfilming, rotary equipment, power-driven equipment, hanging folders, manila folders\*
12. Gummed labels, adhesive labels\*

Nine of the thirteen teachers responding to this study reported that they used the two textbooks on which this study is based, Business Filing and Records Control and Progressive Filing, in their filing classes.

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\*Items on the same line were done by the same number of file clerks.

### Comparison of Tasks Done by File Clerks with Training Given to High School Filing Students

In comparing tasks done by file clerks with training given to high school filing students, it was found that most tasks done by file clerks were taught to some degree by high school filing teachers.

The differences lie in the amount of time spent teaching the items and the tasks done by most file clerks. The following is a list of items where the amount of time spent teaching them matched the number of file clerks performing the tasks:

1. Alphabetic filing
2. Date & time stamping
3. Follow up
4. Numeric filing
5. Open shelf filing
6. Reading correspondence
7. Records protection
8. Sliding shelf files
9. Transferring records
10. Using forms
11. Using guides
12. Visible card files
13. Coding correspondence
14. Records retention
15. Releasing correspondence
16. Rotary files
17. Subject filing
18. Vertical and roll files

Other items where the teaching time differed greatly from the number of file clerks performing the tasks were:

1. Alpha-numeric filing
2. Charge out
3. Commercial filing systems
4. Geographic filing
5. Microfilming
6. Power-driven equipment

Comparison of Opinions of Office Practice Teachers  
and Respondents from Industry Concerning What  
Is Important to Teach in Filing

The following is a list of items in order of importance that were thought to be important to teach in filing by respondents from industries:

1. Visible card files
2. Power-driven equipment
3. Vertical & roll files
4. Open shelf files
5. Sliding shelf files
6. Rotary files
7. Microfilming documents
8. Transferring records
9. Retaining records
10. Reading correspondence, using forms and guides\*

---

\*Items on the same line are ranked of equal importance.

11. Alphabetic filing
12. Alpha-numeric filing
13. Subject filing
14. Commercial filing systems
15. Follow up, hanging folders, manila folders\*
16. Geographic filing, coding\*
17. Numeric filing, tabs\*
18. Requisitions, adhesive labels \*
19. Charge out forms
20. Gummed labels
21. Releasing correspondence for filing
22. Date and time stamping

High school office practice teachers thought the following items (listed in order of importance) were important to teach in high school filing classes:

1. Alphabetic filing
2. Numeric filing, subject filing \*
3. Guides, coding\*
4. Geographic filing
5. Alpha-numeric filing, reading releasing, records transfer\*
6. Charge out, requisitions, tabs, forms\*
7. Date & time stamp, follow up, visible card files, records retention, records protection\*
8. Manila folders, rotary files, vertical & roll files\*

---

\*Items on the same line are ranked of equal importance.

9. Gummed labels, adhesive labels, hanging folders, open shelf files, sliding shelf files, power-driven equipment\*
10. Microfilming
11. Commercial filing systems

In comparing the two lists previously given, the following items were considered fair to good matches:

1. Vertical and roll files
2. Open shelf filing
3. Rotary files
4. Microfilming
5. Records transfer
6. Records protection
7. Reading
8. Forms
9. Commercial filing systems
10. Sliding shelf files
11. Visible card files
12. Guides
13. Alphabetic filing
14. Alpha-numeric filing
15. Follow up
16. Hanging folders
17. Manila folders
18. Adhesive labels

---

\*Items on the same line are ranked of equal importance.



Items on which office practice teachers and respondents from industries disagreed as far as their importance to teach in filing were:

1. Subject filing
2. Geographic filing
3. Numeric filing
4. Tabs
5. Requisitions
6. Gummed labels
7. Charge out
8. Release
9. Date & time stamp
10. Coding

## CHAPTER XI

### CONCLUSIONS

The findings of this study consist of lists and comparisons of tasks performed by file clerks in 67 offices and tasks and topics taught in 13 high school filing classes. Data were gathered using survey questionnaires. The following conclusions are based upon an analysis of the data gathered in the study and pertain to the population previously described:

1. Although many companies responded that they hire full-time file clerks, this job title may be misleading as file clerks are required to do many tasks not related to filing; and almost all file clerks are required to have some typing ability.
2. Larger companies employ more file clerks than small companies, and many small companies do not employ file clerks at all.
3. Since promotions are available for file clerks, persons training for this type of job should also possess other skills.
4. Of all the qualifications that a company would like its file clerks to possess, accuracy is rated as the most important.
5. Respondents from industry in general view the status of the job of a file clerk as either a "middle" or "low" ranking, although the respondents from the larger companies tended to view the file clerk's status at a higher level.
6. The person who controls the files within companies varies from a filing supervisor to a file clerk.
7. The size of a company does not have a bearing on the type of filing arrangement, whether it is centralized or decentralized.
8. The visible card file is the most frequently used type of card file.

9. More companies use an alphabetic filing system than any other filing system. Some companies use only this type of filing system.
10. Geographic, numeric, and subject filing are the filing systems that are least used in companies.
11. The amount of time spent teaching filing and the amount of time spent covering specific topics in filing varies greatly from teacher to teacher.
12. High school office practice teachers spend most of their time in class teaching alphabetic and geographic filing.
13. High school office practice teachers do use the two textbooks this study is based on, Business Filing and Records Control, and Progressive Filing.
14. Office practice teachers and persons from industry are in great disagreement as to the importance of teaching the following items in filing: subject filing, geographic filing, numeric filing, tabs, requisitions, gummed labels, charge out, release, date & time stamping, and coding. Teachers think the filing systems listed above are important to teach, while persons from industries do not think them important to teach. The other items listed above that teachers and persons from industries are in disagreement about are thought to be important to teach by persons from industries and not important to teach by teachers.
15. There is a difference between some of the filing tasks taught in the classroom and those performed by file clerks on the job. The greatest difference is in the area of geographic, numeric, and subject filing. Although few file clerks use these filing systems, many teachers spend time teaching them in the classroom.

## CHAPTER XII

### RECOMMENDATIONS FOR THE CLASSROOM TEACHER

The findings and conclusions of the study served as the basis from which the following recommendations are made:

1. Office education teachers should determine the tasks performed by file clerks in their employment area for purposes of updating their course content in filing classes. For example, this study shows that almost all of the industries required file clerks to have some typing ability; therefore, students expecting to become file clerks should have some typing ability. This study also shows that file clerks do many tasks other than filing; thus, teachers should broaden the training of students so that they are able to meet the various demands of the office job.
2. Because much of the training necessary for file clerks consists of on-the-job training, teachers should prepare students to learn, listen, and be flexible on the job.
3. Because file clerks make decisions on their jobs, filing students should have class experiences in decision making; more instructional time should also be devoted to developing information systems.
4. Business educators and businessmen should work together to upgrade the image of the job of a file clerk so that more students become interested in and realize the importance of this work.
5. Further research should be conducted by business educators and businessmen to improve the job of a file clerk and the teaching of filing in the classroom.

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**APPENDIX A**

**QUESTIONNAIRE COMPLETED BY  
RECORDS SUPERVISORS**



# QUESTIONNAIRE FOR RECORDS SUPERVISORS

<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> Name	<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> Name of Company
<hr style="border: none; border-top: 1px solid black; margin-bottom: 5px;"/> Department	

Please answer the following questions (or check appropriate answers) concerning filing as related to your department and company:

1. How many workers are employed as file clerks in your company?  
 \_\_\_\_ 1-10    \_\_\_\_ 11-20    \_\_\_\_ 21-30    \_\_\_\_ More (Specify Number)
  
2. How would you rank the status of the job of a file clerk in your company?    \_\_\_\_ High    \_\_\_\_ Middle    \_\_\_\_ Low
  
3. Which of the following decisions do file clerks under your supervision make on their jobs?
 

____ What will be filed ____ How long to keep correspondence in files ____ Caption under which to file something	____ Where to file something ____ Whether to transfer files  ____ Other -- Specify _____ _____
--	--
  
4. Which of the following qualifications do you feel are necessary to become a file clerk in your company? (Please rank their importance 1=Very Important    2=Important    3=Unimportant)
 

____ Reading ability ____ Knowledge of abbreviations ____ Good eyesight ____ Memory ____ Manual dexterity ____ Liking for detail	____ Knowledge of rules for alphabetic filing ____ Accuracy ____ Personal qualities such as honesty, good character, loyalty
--	---

List here other qualifications not given above which you feel are important for a file clerk to possess: \_\_\_\_\_
  
5. What type of training is required of a file clerk when he begins his job?
 

____ Works with supervisor for on-the-job experience ____ Must take in-service course in filing ____ Must take course in filing outside company ____ Learns by observation of files and others ____ Other -- Specify _____ _____	
---	--

## Questionnaire for Records Supervisors - Page 2

6. What types of promotions are available for file clerks?  
     \_\_\_ Stenographer      \_\_\_ Clerk Typist      \_\_\_ General Office Clerk  
     \_\_\_ Mail Clerk      \_\_\_ Secretary      \_\_\_ Other--Specify \_\_\_\_\_
7. What other duties do file clerks have besides filing? \_\_\_ Typing  
     \_\_\_ Microfilming      \_\_\_ Sorting and opening mail  
     \_\_\_ Using copying machine      \_\_\_ General office assistant  
     \_\_\_ Other -- Specify \_\_\_\_\_
8. Are your files centralized \_\_\_ or decentralized \_\_\_? If  
     centralized, who has control over them? \_\_\_ Office supervisor  
     \_\_\_ Records supervisor      \_\_\_ File clerk -- Other \_\_\_\_\_  
     If files are decentralized, who has control over them?  
     \_\_\_ Office supervisor      \_\_\_ General office manager  
     \_\_\_ Secretary      Other \_\_\_\_\_

---

DIRECTIONS:	Check below if your file clerk uses or does items listed	Indicate below your opinion as to whether this should be taught in high school filing clases
-------------	---	---

---

File Clerk	Very		
Uses or Does	Important	Important	Unimportant

---

PAPER PROCESSING

Date & Time Stamp	_____	_____	_____	_____
Sort	_____	_____	_____	_____
Code	_____	_____	_____	_____
Read	_____	_____	_____	_____
Release	_____	_____	_____	_____
Cross Reference	_____	_____	_____	_____
Follow up	_____	_____	_____	_____
Requisition slips	_____	_____	_____	_____
Charge out slips	_____	_____	_____	_____

FILING SYSTEMS

Alphabetic	_____	_____	_____	_____
Alpha-numeric	_____	_____	_____	_____
Geographic	_____	_____	_____	_____
Numeric	_____	_____	_____	_____
Subject	_____	_____	_____	_____
Commercial	_____	_____	_____	_____
Other: _____	_____	_____	_____	_____

## Questionnaire for Records Supervisors - Page 3

	File Clerk Uses or Does	Very Important	Important	Unimportant
<u>SUPPLIES</u>				
Forms	_____	_____	_____	_____
Guides	_____	_____	_____	_____
Tabs	_____	_____	_____	_____
Gummed labels	_____	_____	_____	_____
Adhesive labels	_____	_____	_____	_____
Hanging folders	_____	_____	_____	_____
Manila folders	_____	_____	_____	_____
Other: _____	_____	_____	_____	_____
<u>EQUIPMENT</u>				
Open shelf	_____	_____	_____	_____
Power driven	_____	_____	_____	_____
Rotary	_____	_____	_____	_____
Sliding shelf	_____	_____	_____	_____
Vertical & roll	_____	_____	_____	_____
Visible card	_____	_____	_____	_____
Other: _____	_____	_____	_____	_____
<u>RECORDS MANAGEMENT</u>				
Microfilming	_____	_____	_____	_____
Retain records	_____	_____	_____	_____
Transfer records	_____	_____	_____	_____
Protect records	_____	_____	_____	_____
Maintain "dead files"	_____	_____	_____	_____
Other: _____	_____	_____	_____	_____

**APPENDIX B**  
**QUESTIONNAIRE COMPLETED BY**  
**OFFICE PRACTICE TEACHERS**

# QUESTIONNAIRE FOR OFFICE PRACTICE TEACHERS

\_\_\_\_\_  
Name School

\_\_\_\_\_  
Filing Textbook Used

Please answer the following questions (or check appropriate answers) concerning the filing course you teach:

1. How much time do you spend teaching filing? \_\_\_\_ 10 hours or less  
\_\_\_\_ 11-20 hours \_\_\_\_ 21-30 hours \_\_\_\_ 31-45 hours \_\_\_\_ More
2. Where in the business curriculum is filing taught?  
\_\_\_\_ as a separate course \_\_\_\_ as part of another class  
\_\_\_\_ as part of an office practice class \_\_\_\_ other: \_\_\_\_\_
3. What type of evaluation(s) do you give your students in filing?  
\_\_\_\_ teacher-made tests \_\_\_\_ employment application tests  
\_\_\_\_ part of Civil Service tests \_\_\_\_ standardized tests  
\_\_\_\_ other: \_\_\_\_\_
4. Which of the following supplementary materials do you use to teach filing along with the regular text?  
\_\_\_\_ workbook \_\_\_\_ file cards \_\_\_\_ file boxes  
\_\_\_\_ practice set \_\_\_\_ other: \_\_\_\_\_
5. At what grade level in your curriculum is filing taught?  
\_\_\_\_ Grade 9 \_\_\_\_ Grade 10 \_\_\_\_ Grade 11 \_\_\_\_ Grade 12  
\_\_\_\_ other: \_\_\_\_\_
6. Which of the following teaching methodologies do you use to teach filing:  
\_\_\_\_ lecture \_\_\_\_ discussion \_\_\_\_ practical application  
\_\_\_\_ other: \_\_\_\_\_

Questionnaire for Office Practice Teachers - Page 2

DIRECTIONS:	Mark below the amount of time you spend teaching each item listed.				Mark below an indication of your attitude concerning the importance of teaching each item listed.		
	AMOUNT OF TIME				Very Important To Teach	Important To Teach	Not Important To Teach
	Less than 1 hour	1-2 hours	3-4 hours	More			
<b><u>PAPER PROCESSING</u></b>							
Date & time stamp							
Read							
Inspect							
Code							
Release							
Charge out							
Requisitions							
Follow up							
<b><u>FILING SYSTEMS</u></b>							
Alphabetic							
Alpha-numeric							
Geographic							
Numeric							
Subject							
Commercial							
Other: _____							
<b><u>SUPPLIES</u></b>							
Forms							
Guides							
Tabs							
Gummed labels							

Questionnaire for Office Practice Teachers - Page 3

	AMOUNT OF TIME				Very Important To Teach	Important To Teach	Not Important To Teach
	Less than 1 hour	1-2 hours	3-4 hours	More			
<b><u>SUPPLIES</u></b>							
Adhesive labels							
Hanging folders							
Manila folders							
Other: _____							
<b><u>EQUIPMENT</u></b>							
Open shelf							
Power driven							
Rotary							
Sliding shelf							
Vertical & roll							
Visible card							
Other: _____							
<b><u>RECORDS MANAGEMENT</u></b>							
Microfilming							
Records retention							
Records transfer							
Records protection							
Other: _____							

APPENDIX C  
LIST OF COMPANIES  
THAT WERE SENT QUESTIONNAIRES



## LIST OF COMPANIES THAT WERE SENT QUESTIONNAIRES

A & R Roe Printers, Inc.	Dynac Corporation
Adams Sheet Metal Works, Inc.	Ferguson Welding Supply Co.
Advance Products Corporation	Flamm Pickle Company
Aircraft Components, Inc.	Cast Mfg. Company
Anderson Building Materials	Gersonde Equipment Co.
Anstey Foundry Company	Glenlord Home Center Co.
Auto Specialties Mfg. Co.	Grand Tran, Inc.
Avion Coach Company	Graham Metal Corporation
Ball Rubber Company	A. T. Hall Company
Barentsen Candy Company	Harbor Metal Treating Co.
Bendix Hydraulic Division	Harbor Plating Works
Benton Harbor Engineering	Heath Company
Benton Harbor Malleable Industries	Hughes Plastics
Benton Harbor Screw Company	Imperial Printing Company
Blossomland Container Corp.	Industrial Belting & Supply
Burch Printers	Industrial Crating Corporation
Casting Service Corporation	Industrial Pattern Works
Central Pipe & Steel Supply	K-O Products Company
Chemco, Inc.	Kaywood Corporation
Clark Equipment Company	Laboratory Equipment Corporation
Clements Box Company	Lape Steel Stores, Inc.
Continental Can Company	Leco Plating Company
Dayco Sheet Metal	F. A. Long Company
Deecolor Laboratories	MAC Engineering & Equipment Co.
Durable Products, Inc.	Maestro Corporation

Metal Processors, Inc.	Shepherd Casters, Inc.
Michigan Fruit Cannery	Silver Mill Frozen Foods, Inc.
Michigan Standard Alloys, Inc.	Skidmore Pumps
Midwest Tiner Service	Smith Steel Fabricating Co.
Modar, Inc.	South End Beverages, Inc.
Modern Light Metals, Inc.	Southern Michigan Cold Storage
Modern Plastics Corporation	Spielmann Vinegar Company
Musselman-Dwan	State Tool and Gage Company
New Products Corporation	Superior Steel Castings
Nowlen Lumber Company	Tabbert Manufacturing Corp.
Palladium Publishing Co.	Teledyne Casting Service
Paramount Die Castings	Tru Point Products
R. W. Patterson Company	Twin Cities Coca Cola Bottling
Pearl Grange Fruit Exchange	Twin Cities Container Corp.
Pepsi Cola Bottling Co.	Twin City Pattern Works
Plastronic Packaging Corp.	Twin City Plating Corporation
Potlatch Forests, Inc.	United Foods
Producer's Creamery	Univex Looseleaf Corp.
Product Engineering & Mfg. Co.	V-M Corporation
Quality Packaging	Vail Rubber Works, Inc.
Quality Stamping Co.	Watervliet Paper Company
Rauhoff Studios	Whirlpool Corporation
Regal Finishing Company	Wickes Lumber/Building Supply
F. P. Rosback Company	Williams Brothers Paper Box Co.
Royal Crown Cola Bottling Co.	Wolverine Metal Stamping
Saranac Machine Co.	Yore Avenue Plating
Scowcroft Company	Zerbel GMC Trucks

**APPENDIX D**  
**LIST OF HIGH SCHOOLS**  
**THAT RESPONDED TO QUESTIONNAIRES**

LIST OF HIGH SCHOOLS THAT  
RESPONDED TO QUESTIONNAIRES

Benton Harbor High School  
Berrien Springs High School  
Brandywine High School  
Bridgman High School  
Buchanan High School  
Coloma Senior High School  
Eau Claire High School  
Galien High School  
Lakeshore Senior High School  
Niles Senior High School  
River Valley Senior High School  
St. Joseph High School  
Watervliet Senior High School

**APPENDIX E**  
**LETTERS SENT TO RECORDS SUPERVISORS**

50 Meadow St. - Apt. 26  
Amherst, MA 01002  
July 15, 1972

Dear Records Supervisor:

There is a need for improvement in the teaching of filing in our high schools today. Would you like your future employees to be better qualified as file clerks?

You can help the teaching of filing become more realistic by completing the enclosed questionnaire. (It only takes about five minutes of your time.) Since you are actually working with the personnel who do the filing, you are well qualified to answer these questions.

This questionnaire is part of a study being done to compare classroom teaching to the actual filing jobs--Your reply is MOST IMPORTANT to the results of this study. This research project is being done under the supervision of Dr. L. Michael Moskovis, Head of the Business Education Department at Western Michigan University.

Your prompt return of this questionnaire in the self-addressed stamped envelope which is enclosed will be very much appreciated.

Sincerely yours,

Mrs. Patricia Skinner

Enclosures

50 Meadow St. - Apt. 26  
Amherst, MA 01002  
August 8, 1972

Dear Records Supervisor:

HELP! I really need your response to the questionnaire I sent you on July 15, 1972, concerning file clerks. Even if you can only answer some of the questions on the questionnaire, I would sincerely appreciate your sending your response to me.

For your convenience, I have enclosed another questionnaire and reply envelope so that you can send the questionnaire right back to me.

Thank you for your assistance.

Sincerely,

Mrs. Patricia Skinner

Enclosures

50 Meadow St. - Apt. 26  
Amherst, MA 01002  
August 18, 1972

Dear Personnel Manager:

Would you please have the Records Supervisor or person who is in charge of filing and/or filing clerks in your company fill out the enclosed questionnaire--even if all of the questions cannot be answered, I would appreciate a response.

The questionnaire is part of a study being done to compare classroom teaching to actual filing jobs. Hopefully, the results will help teachers better prepare students for office jobs. This questionnaire is part of a study being done under the supervision of Dr. L. Michael Moskovis, Head of the Business Education Department at Western Michigan University.

A self-addressed, stamped envelope is enclosed for a convenient quick response.

Thank you very much for your help.

Sincerely,

Mrs. Patricia Skinner  
Graduate Student  
WESTERN MICHIGAN UNIVERSITY

Enclosures



**APPENDIX F**  
**SIZE OF COMPANIES THAT RESPONDED TO QUESTIONNAIRES**

## SIZE OF COMPANIES THAT RESPONDED TO QUESTIONNAIRES

<u>Name of Company</u>	<u>Size</u>
A & R Roe Printers, Inc.	Small
Adams Sheet Metal Works	Very Small
Advance Products	Small
Anderson Building Materials	Very Small
Auto Specialties Mfg. Co.	Very Large
Ball Rubber Goods	Large
Bendix Hydraulic Division	Large
Benton Harbor Engineering Works	Medium
Benton Harbor Malleable	Medium
Benton Harbor Screw Company	Very Small
Blossomland Container Corp.	Small
Casting Service Corporation	Medium
Central Pipe & Steel	Very Small
Chemco, Inc.	Very Small
Clark Equipment Company	Large
Clements Box Company	Very Small
Continental Can Company	Medium
Durable Products, Inc.	Very Small
Ferguson Welding & Supply Co.	Very Small
Flamm Pickle Company	Very Small
Cast Mfg. Co.	Medium
Gersonde Equipment Co.	Small
Glenlord Home Center Company	Small
A. T. Hall Company	Very Small
Harbor Metal Treating	Very Small
Harbor Plating Works	Very Small
Heath Company	Very Large
Hughes Plastics	Medium
Imperial Printing Company	Small
Industrial Belting & Supply	Very Small
K-O Products Company	Very Small
Kaywood Corporation	Medium
Leco Plating	Small
MAC Engineering	Very Small
Maestro Corporation	Medium
Industrial Pattern Works	Very Small
Modar, Inc.	Small
Modern Light Metals, Inc.	Very Small
Musselman-Dwan	Small
New Products Corporation	Medium
Palladium Publishing Company	Medium
Paramount Die Castings	Medium
Potlatch Forests	Medium
Quality Packaging	Small

<u>Name of Company</u>	<u>Size</u>
Quality Stamping Company	Very Small
Rauhoff Studios	Very Small
F. P. Rosback Company	Small
Royal Crown Cola Bottling Co.	Very Small
Shepherd Casters, Inc.	Medium
Silver Mill Frozen Foods	Medium
Skidmore Pumps	Small
Smith Steel Fabricating Co.	Very Small
Southern Michigan Cold Storage	Small
Spielmann Vinegar Company	Very Small
Superior Steel Castings	Medium
Teledyne Casting Service	Medium
Twin Cities Coca Cola Bottling Co.	Small
Twin City Pattern Works	Very Small
United Foods	Small
Univex Looseleaf Corp.	Medium
V-M Corporation	Very Large
Vail Rubber Works, Inc.	Small
Watervliet Paper Company	Medium
Whirlpool Corporation	Very Large
Wickes Lumber/ Bldg. Supply	Very Small
Williams Bros. Paper Box Company	Small
Zerbel GMC Trucks	Small

**APPENDIX G**  
**LETTERS SENT TO OFFICE PRACTICE TEACHERS**

50 Meadow St. - Apt. 26  
Amherst, MA 01002  
October 1, 1972

Mrs. Janice Lane  
Office Practice Teacher  
Lakeshore High School  
Stevensville, MI 49127

Dear Janice:

Thanks again for your help this past summer in revising my questionnaire. Enclosed is a copy of the questionnaire in final form. I would appreciate your completing it and returning it to me in the enclosed stamped, self-addressed envelope as soon as you can.

I hope you are enjoying your new teaching position at Lakeshore.

Sincerely,

Mrs. Pat Skinner

Enclosures

50 Meadow St. - Apt. 26  
Amherst, MA 01002  
October 15, 1972

Dear Office Practice Teacher:

Your response to the enclosed questionnaire is really important in order for me to complete my study on filing. Even if you can only answer some of the questions listed, would you please return the questionnaire to me.

Your time and effort will be greatly appreciated.

Sincerely,

Mrs. Patricia Skinner  
Graduate Student  
WESTERN MICHIGAN UNIVERSITY

Enclosures

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50 Meadow St. - Apt. 26  
Amherst, MA 01002  
November 5, 1972

Dear Business Department Chairman:

Would you please have the person who teaches filing in your department fill out the enclosed questionnaire and return it to me in the self-addressed envelope that is also enclosed. If you do not have filing or a related course in your curriculum, I would appreciate your making this notation on the questionnaire and returning it to me.

This questionnaire is part of a study being done to discover what is being taught in filing as related to what file clerks do on their jobs. A reply from your school is most important to the results of this study.

Please help me to obtain a 100 percent response to these questionnaires by returning the enclosed questionnaire today.

Sincerely,

Mrs. Patricia A. Skinner

Enclosures