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A Study to Validate the V-Tecs Catalog of Tasks for Legal Secretaries in the Norfolk-Portsmouth Virginia Reach Area

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A STUDY TO VALIDATE
THE V-TLCS CATALOG OF TASKS
FOR LEGAL SECRETARIES
IN THE NORFOLK-PORTSMOUTH-VIRGINIA BEACH AREA

A research Paper
Presented to
The Faculty of the Graduate School
Old Dominion University

In Partial Fulfillment
of the Requirements for the Degree
Master of Science in Education

by
Margaret Say Hamilton

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This research paper was prepared by Margaret Hamilton under the direction of Dr. Mildred Mason in VIAE 636, Problems in Education. It was submitted to the Graduate Program Director as partial fulfillment of the requirements for the Degree of Masters of Science in Education.

APPROVED BY:

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CHAPTER I

Introduction

For some years the Nation's consciousness has been focused on the educational system and its apparent inability to develop high school graduates who are functionally literate in communication, computational, and social science skills. The resulting unrest provided the educational climate and soil for a new concept to be planted and nurtured.

"Seldom in the history of education has an idea so captured the general imagination and so quickly gained wide acceptance as has competency-based education. . . .The demand that educational institutions be accountable for the products of their programs, the rising strength of the education measurements movement, and the continuing need to improve education effectiveness all contributed to the development of competency-based education.

"The notions of identifying the needs of the occupation, setting standards for student performance, and evaluating that performance, are, of course certainly not altogether new to vocational education. What is new is the insistence on the use of validated competencies, systemic procedures for delivering instruction, and more objective student assessment devices." Competency-Based Vocational Education, p.1.

Under the Standards of Quality legislation, Virginia has mandated that vocational education be fully competency-based by 1981.

In order to facilitate competency-based vocational education, Virginia joined a group of southern states forming the Vocational Technical Education Consortium of States (V-TECS).

The purpose of the Consortium was to eliminate the duplication of curriculum efforts across state lines and to provide instructional materials that could be commonly used by the member states. The first step was to perform a study on the state of the art of a particular vocational area. These results were then used to develop a list of tasks performed by a worker. The task list was then used to develop a computation of the tasks actually performed and the percentage of time spent by workers on each task.

The work of validating the various vocational areas was divided among the participating states in the Consortium. The vocational area of legal secretary/court reporter was done by the State of Kentucky. In 1976 a V-TECS catalog of tasks was published entitled "Catalog of Objectives, Criterion-Referenced Measures, and Performance Guides for the Legal Secretary and Court Reporter."

Statement of the Problem

The purpose of this study was to determine if the tasks of the V-TECS catalog for legal secretaries accurately represent the tasks performed by entry-level legal secretaries in the area served by the graduates of the Norfolk Technical Vocational Center.

Research Goals

This study focused on finding answers to the following questions:

- 1) In what specific tasks must the entry-level employee be competent to be considered for employment in legal offices in Norfolk, Portsmouth, and Virginia Beach?
- 2) What specific tasks are performed by legal secretaries in Norfolk, Portsmouth, and Virginia Beach?

- 5) What relative importance do legal secretaries place in job success on certain attitudes, basic skills, and the performance of job-specific tasks?

Significance of the Study

The Norfolk Technical Vocational Center is a vocationally oriented, secondary, public school in the City of Norfolk. Students are bussed from five high schools for a half day of specialized vocational instruction in twenty four occupations in the occupational clusters of agriculture, business, distribution, health, home economics, and trade industrial. In 1974 a course in legal office procedures was opened to juniors and seniors in high school as well as available on a space available basis. The results of this study will help to determine if there is a need to alter the curriculum so that the course will better meet the needs of the legal offices in Norfolk. The study will also help to determine where graduates will be employed. A preliminary study of the legal office needs in Norfolk also was conducted. The study was conducted by the legal secretaries who have completed the course.

Limitations

Answers to the survey instrument may have varied depending upon the nature of the respondent in the law office, upon the level of specialization, and upon the title of the respondent. No effort was made to determine the influence or lack of influence of these factors.

The study did not make an effort to validate the tasks for the legal office as the respondents were concerned with court reporting. The study did not make any conclusions that could be applied to other occupations. The study was not designed to determine Beach County's legal office needs. The study did not attempt to consider geographic variations.

Assumptions

This study was based upon the following assumptions:

- 1) that respondents answered the survey questions based upon what actually occurs, rather than what they would ideally like to occur, in the hiring and training of entry-level workers;
- 2) that the respondents were not influenced by personal prejudices or attitudes;
- 3) and that the offices surveyed do hire entry-level legal secretaries.

Definition of Terms

The terms used in this study will have the following meanings:

Catalog. A comprehensive collection of performance objectives, performance guides, criterion-referenced measures, and related data, organized by a job structure or career ladder within a domain of interest.

Entry-Level Legal Secretary. An office worker employed by one or more lawyers without previous office experience.

Educational Consortium. A group of state agencies, institutions, or other entities which have been legally constituted through letters of commitment, agreements, or by assignment of higher authorities to work together toward the solution of problems in education. A consortium, for the purposes of this work, must have membership from autonomous agencies and institutions which cut across state boundaries as they attempt to solve problems or meet goals.

Task. A unit of work activity or operation that constitutes a logical and necessary step in the performance of a duty.

Summary

This study was to determine if the 104 job-specific tasks developed by the State of Kentucky in the area of legal secretarial are tasks that are performed in the Norfolk-Portsmouth-Virginia Beach area. In addition, the study was to establish a quantitative relationship among the factors of attitudes, basic skills, and

job-specific skills as they affect job success as viewed by employees already working in legal offices.

CHAPTER II

REVIEW OF LITERATURE

Much has been written recently on the competency movement. In this review the focus has been on the movement in grades kindergarten through twelve; how the movement has affected the area of vocational education; more specifically, how business education has been influenced; and lastly, if and how competency-based education has reached the level of legal secretarial training.

Minimum Competencies

During the past decade the attention of the Nation has been targeted upon the failure of the educational institutions to provide an adequate background to enable young people to assume adult roles in a society that is becoming progressively more complex and technological. The assumption has been that the schools are failing. In response to this outcry, many states, including Virginia, have developed minimum competency testing for high school students as an effort to bring all students up to a minimum level of competency in reading and computing skills. Reactions to minimum competency testing has been widespread and controversial.

Robert L. Ebel, Professor of Educational Psychology at Michigan State University says:

" . . . minimum competency testing will not cure all the ills of contemporary education, but it will do much to correct one of the most serious of those ailments: It will help to restore concern for the cognitive development of young people to highest priority in the missions of the school. It will motivate teachers to teach more purposefully and students to work harder to learn." Ebel, p.549.

This surge for excellence in the classroom demanded that teachers be held accountable for the results of their classroom instruction and led to an insistence that all teachers, from kindergarten to the university level, state what they intended to teach in terms of behavioral objectives. These objectives state specifically what they expected the student to be able to achieve upon the completion of a unit of study.

The bulk of the research on the competency movement from grades kindergarten through the university level is negative. When interviewed concerning his views Lawrence A. Cremin, President of Teachers College at Columbia University, said:

"I have been critical of the movement. . . .A great deal of the work that was required of teachers in many academic preparatory institutions could not be defended as contributing directly or indirectly to their abilities as teachers in the classroom. What started out as a well-intended effort to connect professional preparation with reality became a kind of unstoppable movement toward a particular utilitarian definition of outcomes with respect to anything in the professional curriculum. . . . If I were asked to define narrowly the 83 particular behavioral competencies that a teacher would gain in my course, anything I would put on paper would be a fraud." Ryan, p. 116.

In an article entitled "Why the Accountability Movement Is Going Nowhere," Robert A. Schultheis, Professor of Business Education and Administration at Southern Illinois University, says that the accountability movement was designed to fix the blame for the failure of the schools onto teachers and school administrators. However, Schultheis feels that the accountability movement to others connotes a much-needed alteration in the evaluation of a broad scope of educational input, such as books in the libraries, pupil-teacher ratios, degrees held by teachers, per pupil expenditures--all the way to output measures such as scores on achievement

tests, job placements and job successes. Schultheis says that the management by objective in industry gave the impetus to the movement in education. "Many legislators, government officials and educational administrators have tried to impose business management practices on the educational system, hoping in the process, to improve the process to improve the outcomes and efficiency of the system." (Schultheis, p. 29-33)

Schultheis ^{also} ~~sees~~ a resistance to the accountability movement based upon a number of considerations. He says that what happens in the classroom is complex and is influenced by factors besides teachers; i.e., administrators, counselors, the learning environment, state departments and state boards of education, plus state legislatures. He fears that the teacher alone will be held accountable when in fact he/she cannot control many of the variables that contribute to a child's success, such as the child's previous educational experience, its socio-economic background, and its genetic endowment. (Schultheis, p. 29-33)

The accountability movement has given rise to competency-based education where a student's achievement is based upon whether or not he/she has met a pre-determined level of competency. In an article entitled "K - 12 Competency-Based Education Comes to Pennsylvania," John H. Sandberg, Director of Teacher Education at Carnegie-Mellon University ". . . fears that it will succeed only in diverting vast amounts of time, energy, and intelligence from more important and attainable goals." In the Pennsylvania "Project 81" the goal is to see that students acquire the skills and knowledges they need to succeed in the adult world. Sandberg feels this goal is unattainable because we don't know now what the competencies will be in ten years, a time when the student becomes

an adult, in a fast-changing technological society. Sandberg would prefer to teach students to read, to write, to do arithmetic, to draw, to make music, and to get along with each other. He says, "We are not doing these few things for enough kids now, so perhaps that is what we should be working on instead of making new lists of things we won't know how to do." (Sandberg, p. 119.)

Vocational Education

Competency-based education has achieved a strong foothold in vocational education, and its implementation has generated strong positive and strong negative feelings from many leaders in the field.

A strong supporter is Ben A. Hirst, Jr., Executive Director of V-TECS. In his article entitled "Laying It On the Line," he has outlined the ten necessary components of a successful competency-based vocational program: (Hirst, p. 31.)

1. employment opportunities for students
2. identified tasks that workers perform
3. modification of tasks to the local area
4. estimation of time lapse between instruction and the student's first performance on-the-job; then, based upon entry-level tasks, the actual writing of the performance objective
5. an analysis of the existing instructional materials and media
6. development of new materials and media
7. development of lesson plans
8. testing new materials, media, and lesson plans
9. revising materials and media
10. reviewing and up dating the task analyses

Hirst summarizes by saying that the development of a competency-based vocational program is not easy. V-TECS can supply a program with all but 5 through 9 of the above components. He recommends that 25 percent of the materials that are being currently used in traditional methods be discarded. He concludes that a CBVE program results in 1) a positive linkage between what is being taught in the classroom to what is performed on the job; 2) a success-

oriented atmosphere for learning; 3) a learning environment where competition among students is eliminated and the competition between a student's performance and that needed on the job is encouraged. It is an approach where learning becomes the primary reason for instruction, and the time frame becomes less important. The teacher sets the environment for learning and acts as an aide in guiding the student through meaningful learning experiences. The learners take on the responsibility for learning the tasks that they know will lead to productive jobs. (Hirst, p. 31.)

Michael V. Sugarman has some reservations about CBVE. In his article "Accountability and the Systems Approach to Vocational Education," he calls attention to a frequently overlooked component to successful vocational training; i.e., student readiness. What is the student's attention span, motivation, and level of development?

"When the institutional philosophy is such that the cost-effectiveness of the training is subservient to preparing people for useful employment (as it is in the public schools) the system must have the flexibility to adapt to individual needs. Remedial or auxiliary components must be added." (Sugarman, p. 62.)

William E. Blank, Assistant Professor for Adult and Vocational Education at the University of South Florida favors CBVE provided it incorporates four essential characteristics: (Blank, P. 32.)

1. precisely worded tasks verified as essential to entry-level employment in the occupation
2. learning activities tailor-made to match the verified tasks
3. sufficient time provided (within reason) for each student to perform the tasks
4. certification, grading, and exit based on the student's ability to perform the task.

Blank made reference to the results of Benjamin Bloom's analysis of thousands of major research efforts. Bloom concluded

that the mastery learning approach is viable and that there are three variables necessary to move closer to the ideal where students reach mastery: (Blank, p. 32.)

1. cognitive entry behaviors - great care must be made to make sure that students master prerequisite tasks
2. affective entry behaviors - students' feelings about the task must be enthusiastic
3. quality instruction.

Blank says that a great deal of research has been done evaluating the results of CBVE and that three messages emerge: (Blank, p. 32.)

1. No improvement in learning is noted if traditional programs are only modified.
2. Well-designed approaches to CBVE, such as carefully designed learning packets and appropriate use of the media, tend to enhance learning significantly.
3. Training time is lessened and student attitude is favorable in a CBVE program.

Schultheis' article "Why the Accountability Movement Is Going Nowhere," focuses attention particularly to vocational education when he asks if it is fair to hold a vocational teacher accountable when an auto mechanics student reads at the third grade level. He maintains that competency-based instruction with criterion-referenced measures compounds the problem of accountability. He asks if a shorthand teacher can be held accountable for poor transcription skills when the other teachers poorly prepared those students in typing and English grammar. "Most competency-based program outcomes include many that are partially or wholly the turf of teachers in general education areas." He also warns that competency-based education is narrowing the learning experience: (Schultheis, pp. 29-33.)

"Many human relations, attitudinal or affective behaviors are very difficult to state in observable and measurable terms. When we examine the research in job success, however, we often confront conclusions that lead us to believe that affective objectives are more critical to job success than the acquisition of a host of facts or number skills. Pressure in a system designed to hold teachers accountable will be to limit course and program objectives to those that are easy to describe in measurable terms and easy for the student to acquire." (Schultheis, P. 29-33.)

Schultheis feels that projects such as V-TECS are disturbing because they fail to focus on the needs of a locality and instead focus on a broad spectrum of a society that is highly pluralistic. He also maintains that personnel in school systems which have tried measurable behavioral objectives are smothered in a blizzard of paperwork. He feels that objectives, competencies, and evaluations should be locally developed based on local surveys of employers' requirements along with student abilities and interests and all factors should be considered with the full knowledge of the pitfalls of these devices.

Gilli, Professor of Education at SUNY College of Technology, and Wilcox, Cosmetology instructor at Western Delaware BOCES, in their joint article "A Critical View of CBE" believe that the best vocational instruction will be a compromise between CBE and the traditional classroom. The notion that everyone must achieve minimum levels of proficiencies is unrealistic. Gilli and Wilcox also advise against validating competencies because the results or usefulness after such a delay would be minimal. Compromise, they say, is realistic. Instructors should demand minimum achievement from each student based upon what each student can succeed in doing within a reasonable length of time and what is needed on the job.

Mainstreaming handicapped puts another added dimension of complexity into the problem and causes teachers to resent the concept of accountability. They conclude:

"The irony in all this is that excellence in C-B industrial education is remarkably like the good teaching before CBE came to our attention. So let's not be carried away from the groundswell of pressure to incorporate CBE, but instead use it as a tool in our ongoing quest to improve instruction. Let's use it and not permit it to use us."
(Gilli, Wilcox, p. 44.)

Some untested new ideas are being promulgated concerning vocational instructional methods. Paul V. Braden and Krishan K. Paul suggest that a closer linkage be developed between employers and vocational education where vocational education provides classroom training and industry provides on-the-job experience.
(Braden, p. 36-38.)

The View from Industry and Business. An abundance of literature focuses on the input from industry and business and seems to point to one conclusion: "Give us students with basic skills and attitudes, and we will do the rest."

Ione Phillips, in an editorial in the October 1980 issue of "Vocational Education Journal" summarizes the views of representatives from the business community when they were posed with the question of how vocational education is helping them find good workers. A common theme running through their responses is that they all need workers who can read, write, compute, and think. They say they can get the job done only with employees who get to work on time, who cooperate with others, who take responsibility, and who can adapt to change. Phillips says . . . "This says to vocational educators that business recognizes the value of a

program that blends the teaching of basic and employability skills with the teaching of job-specific skills. It is just this approach that all of the good vocational education programs take in preparing students for work." (Phillips, p. 29.)

In an article entitled "Business Is Ready," author Jim Hendricks quotes Gordon L. Hough. Hough is retired at age 80 after 32 years with Bell System as Chairman of the Board of Pacific Telephone for the last three years. He was founder and member of Industry Education Council of California. Hendricks quotes Hough:

"To me, the job application should not be the first place where business and education come together. The first call of career education should be to teach specific skills and the specific skills - I'm not necessarily referring to such activities as typing, auto repair, or carpentry. Vocational classes are certainly both important and useful, but career education should emphasize the development of those basic skills upon which the learning of other skills is based." (Hendricks, p. 39.)

Mr. Hough concluded:

"Vocational education programs can benefit their own cause as well as that of their students by concentrating more on basic skills because the employer will send the candidate for training in specific skills to perform on the job."

He also believes that vocational education should develop good attitudes, prepare students to accept change, provide students with more information about jobs, and provide students with actual work experience. (Hendricks, p. 39.)

Along these same ideas, James Campbell, Chairman of the Education Employment and Training Committee of the Chamber of Commerce of the United States in his article "A U.S. Chamber of Commerce View: Employers Expect the Best," says that in a survey made of employers by the Vice President's Task Force on Youth,

employers said that they sought high school graduates who could read, write, compute, and communicate. Students who lack such skills will not benefit from occupational training in the long run for they are not able to function in today's complex and rapidly evolving organizations - whether large or small. "Quality," according to Campbell, "is the issue." Given a choice between a first-class mechanic who does not come to work regularly and an untrained, but interested, employee, the employer prefers the untrained employee who can be depended upon. Campbell says:

"Employers want responsible workers. Employers want employees who are competent to face ups and downs with courage; committed to doing a good job at whatever they plan to do with their lives; able to recognize that every project has a beginning, a middle, and an end; and able to begin an assignment and take each step to carry the project to a conclusion of which the employer can be proud. Employers believe schools should teach all students to work to such standards." (Campbell, p. 30.)

Campbell also maintains that employers are very critical that vocational schools take the least able students. Employers cannot turn over complex, expensive equipment to people who are not quick witted. Eighty percent of jobs in business do not absolutely require a college degree; yet 37 percent of high school graduates go on to college. There is a need for loosening the boundaries between vocational education and college.

Robert Miller, Assistant Professor in the Business Education and Administrative Services, Central Michigan University, and Wells F. Cook, Associate Professor, at the same university cites a study done by the Vocational Education Advisory Council in Texas, which seems to echo the pleas of employers concerning attitudes. A statewide survey on the "Qualities Employers Like or Dislike in Job Applicants" found that the ten leading reasons employers gave for rejecting job applicants were, in rank order, below: (Miller, p. 255.)

1. little interest or poor reasons for wanting a job
2. applicant has past history of job hopping
3. inability of applicant to communicate during job interview
4. health record
5. immaturity (other than chronological age)
6. personal appearance
7. manners or mannerisms
8. personality
9. lack of job-related skills
10. poorly filled out job application form

A back-to-basics supporter is Len Mrachek. In an article entitled "Forward to the Basics,," he emphasized the need for teaching basic skills at all levels of schools and encouraged vocational teachers to take advantage of the "golden opportunity" to show the general education teacher the necessity of properly preparing students so that they can meet the challenges of a modern, technological society. (Mrachek, p. 23-25.)

Business Education

Those business educators who are totally competency-based are very enthusiastic; but there are others who believe that total CBE does not focus sufficiently on basic skills and attitudes necessary for job success.

Charles Walejko, Business Chairman with the Business Education Department of Woodruff Regional Occupational Center in Stockton, California, authored an article entitled "How to Be in 30 Different Places at the Same Time." Woodruff is totally competency-based and he identifies their number one activity as helping students solve problems that are blocking their paths toward job competency. At Woodruff student aides are used extensively to help solve the problem of a teacher's being in 30 places at the same time. Aides must have clearly defined duties; they must be carefully trained in those duties; and they must be closely supervised

in the performance of those tasks from the beginning. Storage of materials is also a problem. No one has access to the storage except students who are paid to work there. There must be control of reproduction and students must have access to keys for evaluating their work. Evaluation of the overall program is sought from students, both current students and students who have graduated; from teachers, counselors, and administrators; from advisory committees, and employers. (Walejko, p. 34-36.)

Jane M. Banks, Certified Public Secretary, and Professor of Secretarial Science at Brookdale Community College, New Jersey, feels that secretarial students, in addition to shorthand, typing, and English skills, must have definite skills which she calls "survival skills" to enable them to get and keep jobs long enough to be promoted vertically or horizontally. These skills include: (Banks, p. 18-22.)

1. Communication: Ability to
 - a. handle the telephone
 - b. ask questions and to listen
 - c. locate information
 - d. develop chronological files
 - e. track the executive
2. Decision Making: Ability to
 - a. make decisions
 - b. work under pressure.

Thomas R. Allen, Jr., Professor in the College of Business, Appalachian State University, Boone, NC reports that in a recent survey conducted with employers and teacher coordinators of cooperative office education programs, results decidedly revealed that most problems are either directly or indirectly related to poor written and oral communications. Problems identified in written communication were specifically noted in the following areas: (Allen, p. 55.)

1. poor handwriting
2. misspelling
3. lack of sentence variety
4. little knowledge of basic sentence structure
5. an absence of rhetorical classification
6. inability to paragraph
7. too much emphasis on "I"
8. lack of evidence of use of the 5 "W's"
9. poor reading ability

Oral communication problems were identified as:

1. inability to handle telephone
2. lack of the use of the 5 "w's" in relating information
3. lack of tact in daily transactions
4. failure to comprehend and commenting upon a problem without first understanding it.

Legal Secretarial

The availability of research in the legal secretarial field was limited; however, one master's research study was done in 1975 by Wanda Freeman entitled "The Role of the Legal Secretary and Legal Assistant in Law Offices in Atlanta." Freeman found that the ten most frequently performed duties in law offices in Atlanta were, in order of importance: (Freeman, p. 16.)

1. taking dictation and transcribing
2. filing
3. answering the phone
4. billing clients
5. composing and answering routine correspondence
6. handling closed files
7. acting as host or hostess in the office
8. handling incoming mail
9. placing long-distance phone calls
10. discarding certain mail selectively.

Earl B. Russell, research specialist and coordinator of the Advanced Study at National City for Research in Vocational Education, Ohio State University, cites the Mid Westchester Center for Occupational Education at Valhalla, NY as a school to contact concerning an ongoing Legal Secretarial Program under total Competency-Based Education. The selection of this school and specific legal

secretarial program was based upon the program's meeting the following criteria:

1. pretesting of students upon entry
2. allowing each student to proceed to subsequent instruction as soon as performance objectives are met
3. providing an alternative method of instruction if a student does not achieve a learning task
4. recording a student's performance as each objective is achieved
5. placing greater emphasis on exit requirements than on entrance requirements
6. exiting students on the basis of competencies evaluated by criterion-referenced testing.

If further information on this legal secretarial program is desired, Donna M. Santa may be contacted by writing or telephoning 914 761-5400. (Russell, p. 55.)

Summary

Although there seems to be much controversy concerning the effectiveness of the competency movement in the area of general education, there seems to be a consensus that in vocational education the direction is toward total competency-based education or to a compromise where the best of CBE and the traditional methods are integrated.

Among employers, there is a definite cry for educators to swing back on all levels, from kindergarten through 12, to an emphasis on basic skills, as well as an emphasis on developing improved attitudes.

Significantly, surveys of employers in business seem to point to a need for better oral and written communications among job applicants coming from business curricula.

Employers seem concerned that the lack of basic skills will prevent today's youth from being successfully assimilated into the highly technological work force that will be needed in the years just ahead. They are cautioning vocational educators to find a balance among three elements of employability: 1) basic skills, 2) job-specific skills, and 3) attitudes.

CHAPTER III

METHODS AND PROCEDURES

Methodology

To determine which of the 104 V-TECS tasks are performed in the Norfolk-Portsmouth-Virginia Beach area legal offices, the researcher designed a survey to be answered by legal secretaries already working in legal offices.

Population

Because the survey involved responses to 104 tasks, a personal contact seemed advisable in order to secure a reasonable response. The researcher contacted the Presidents of both the Virginia Beach and the Norfolk-Portsmouth Legal Secretaries Association and requested and was given permission to attend a meeting of each association to explain the purpose of and to distribute the surveys.

Virginia Beach had a total membership of 27; Norfolk-Portsmouth, 42.

Field Procedures

On March 23, 1980, the researcher attended the Virginia Beach Legal Secretaries Association and distributed surveys to those in attendance; on April 2, to the Norfolk-Portsmouth Association.

One week following each of the meetings, a letter was sent to those members not in attendance requesting that they

complete the survey and return in the mail within approximately one week.

A follow-up telephone call was made to each member not returning a survey approximately two weeks following the mailing of the letters.

Sixty-nine legal secretaries were contacted personally, by mail, and by phone.

Questionnaire

The questionnaire was designed in two parts. Part "A" listed the 104 V-TECS tasks. The respondents were requested to check one of three columns. The directions follow:

Place a ✓ in Column 1, "Essential," if a task is so important in your office that you would not hire an entry-level worker if he/she is not highly proficient in its performance.

Place a ✓ in Column 2, "Helpful But Not Essential," if a task is performed in your office but you would consider hiring an entry-level worker who is not proficient in the performance of that task.

Place a ✓ in Column 3, "Not Needed," if a task is not performed in your office.

If the respondent checked Column 1, the researcher assumed that this task is performed by the secretary; and that, in her opinion, she would not have been hired without a reasonable proficiency in its performance.

If Column 2 was checked, the researcher assumed that this task is performed by the respondent; but, in ^{his/}her opinion, [^]she/^{he} could have been hired without proficiency, and that proficiency was developed on the job.

If Column 3 was checked, the researcher assumed that the task is not performed by the respondent.

In Part "B" of the questionnaire, a list of ten abilities (skills and attitudes) were listed with space for the respondent to add any that were omitted which she felt to be significant. The respondent was asked to rank the abilities in importance by placing a "1" beside the ability she considered to be the most important in a legal office; a "2" beside the second in importance, etc.

The researcher's purpose was to arrive at a quantitative ranking of these skills and attitudes.

Summary

The purpose and design of the survey was to:

1. determine to what extent each task is performed in legal offices in the area served by the Norfolk Technical Vocational Center;
2. and, to determine how legal secretaries view the importance of mastery of these tasks in relation to certain other basic skills and attitudes.

CHAPTER IV
FINDINGS

A total of 35 questionnaires were returned representing input from 47 legal secretaries. Several large offices having a number of secretaries in the legal secretaries associations, collaborated and returned one questionnaire representing the combined views of all the members. The size of the offices ranged from 1 lawyer to 25, and from 1 secretary to 35.

Part "A"

On the pages that follow is the actual questionnaire with the percentage of responses for each task shown in the appropriate column at the right.

SUEVELY INSTRUMENT

Please fill in the following information:

Name of Law Firm _____

Address of Law Firm _____

Name of Respondent _____

Phone Number _____

No. of Lawyers, Associates, etc. _____ No. of Office Workers _____

PART A

Listed below are 104 tasks that have been researched and developed by a team of researchers in Kentucky as tasks that are performed by legal secretaries. The purpose of this questionnaire is to determine which of these tasks are performed by entry-level workers (vocationally trained in legal secretarial but without job experience) in legal offices in Norfolk and Virginia Beach.

Ideally, a teacher should teach virtually all of these tasks. Time will not permit such thorough training. You can best help legal secretarial teachers in your area to focus on the truly essential tasks by completing the following survey.

INSTRUCTIONS:

Place a in Column 1, "Essential," at the right if a task is so important in your office that you would not hire an entry-level worker if he/she is not highly proficient in its performance.

Place a in Column 2, "Helpful but Not Essential," at the right if a task is performed in your office but you would consider hiring an entry-level worker who is not proficient in the performance of that task.

Place a in Column 3, "Not Needed," if a task is not performed in your office.

LEGAL SECRETARIAL TASK	Essential	Helpful But Not Essential	Not Needed
Planning and Organizing			
1. Arrange office layout	9	23	69
2. Plan work and set priorities	65	23	12
Supervising and Implementing			
3. Act as Notary Public	40	60	0
4. Add supplements to law library	11	67	22
Inspecting and Evaluating			
5. Inspect invoices for accuracy	34	37	29
6. Inspect checks for acceptability	46	31	23
Coordinating and Performing Personal Activities for Employer			
7. Make arrangements for employer's trips	20	63	17

Survey Instrument - Page 2

Essential	Helpful But Not Essential	Not Needed
-----------	---------------------------------	---------------

LEGAL SECRETARIAL TASK

	%	%	%
Performing General Dictation Duties			
8. Take dictation directly at the typewriter	54	54	11
9. Take dictation of and transcribe business letters	91	9	
Performing General Typing Duties			
10. Take dictation of and transcribe memoranda	89	11	
11. Take dictation of and transcribe telephone conversations	66	25	11
12. Type income tax returns	11	46	43
13. Type letters, memoranda, and reports from longhand notes	80	20	
14. Type letters from previously typewritten material	91	9	
15. Type memoranda from previously typewritten material	80	20	
16. Type reports from previously typewritten materials	51	26	
Preparing Client Documents			
17. Prepare agreements from dictation	71	26	
18. Prepare agreements from rough draft	76	21	3
19. Prepare bills of sale	41	47	9
20. Prepare codicils	57	34	9
21. Prepare contracts from dictation	71	23	6
22. Prepare contracts on pre-printed forms	63	34	3
23. Prepare deeds from dictation	68	26	6
24. Prepare deeds on pre-printed forms	60	31	9
25. Prepare leases from dictation	66	28	6
26. Prepare leases on pre-printed forms	59	32	9
27. Prepare mortgages from dictation	49	37	14
28. Prepare mortgages on pre-printed forms	51	40	9
29. Prepare chattel mortgages on pre-printed forms	13	37	20
30. Prepare promissory notes from dictation	60	31	9
31. Prepare promissory notes on pre-printed forms	56	41	3
32. Prepare powers of attorney from dictation	57	40	3
33. Prepare powers of attorney on pre-printed forms	5	34	9
34. Prepare wills	60	23	11
35. Prepare articles of incorporation	48	30	11
36. Prepare corporation minute books	18	30	11
37. Prepare stock certificates	38	44	18
Preparing Court Documents			
38. Prepare adoption papers	50	32	18
39. Prepare answers from typewritten copy	56	38	6
40. Prepare affidavits for motions and notice	59	32	9
41. Prepare answers	56	32	12
42. Prepare papers for bankruptcy	29	44	26
43. Prepare bills	19	40	11
44. Prepare complaints on pre-printed forms	49	31	20
45. Prepare complaints from sample forms	55	36	8
46. Prepare complaints from dictation	63	26	6
47. Prepare answer and counterclaims	59	32	9
48. Prepare answers and cross claims	60	31	9
49. Take depositions	17	43	10

Survey Instrument - Page 3

	Essential	Helpful But Not Essential	Not Needed
	%	%	%
LEGAL SECRETARIAL TASK			
50. Prepare restraining orders (injunctions)	26	54	20
51. Prepare judgments	54	37	9
52. Prepare motions	51	40	9
53. Prepare motions and notice	51	40	9
54. Prepare notices	54	40	6
55. Prepare public notices	51	51	17
56. Prepare orders	54	38	8
57. Prepare petitions from dictation	57	34	9
58. Prepare petitions from sample forms	54	40	6
59. Prepare subpoenas	41	36	19
60. Prepare summonses	46	29	26
61. Prepare petitions and certificates for dissolution of marriage	49	37	14
62. Prepare findings of facts and decrees for dissolution of marriage	47	32	21
63. Prepare papers for probate court	51	43	23
64. Prepare final settlements of estates	57	46	17
65. Prepare papers for child support	42	39	19
Performing Mail-Handling Duties			
66. Prepare envelopes for mailing	86	14	
67. Forward mail	74	20	6
68. Handle specialized mail	60	34	6
69. Prepare enclosure materials for outgoing mail	80	20	
70. Process incoming mail	65	31	6
Performing Filing Duties			
71. Establish alphabetical system of filing	46	31	23
72. Keep alphabetical files	65	31	6
73. Establish numerical system of filing	37	29	34
74. File matters numerically	51	29	20
75. Establish file of addresses and telephone numbers	54	31	14
76. Establish file of legal forms	68	26	6
77. Transfer and discard files	48	40	12
78. Obtain materials or information from files	68	28	3
79. Search for lost materials in files	67	30	3
Performing Accounting and Financial Recordkeeping Duties			
80. Keep checkbook	46	17	37
81. Keep income and expense records	28	42	30
82. Prepare bank deposits	46	23	31
83. Prepare office payroll	20	40	40
84. Prepare quarterly tax withholding reports	20	43	37
85. Reconcile bank statements	51	34	34
86. Initiate and maintain client records	57	43	
87. Prepare and post petty cash vouchers	15	53	31
88. Prepare and post check records	17	49	34
89. Initiate and maintain client account sheets	52	31	31
90. Prepare statements to clients	48	42	9
Performing Clerical Duties			
91. Apply for necessary public communication	46	51	3
92. Prepare travel expense vouchers	46	46	37
93. Mark exhibits presented in court	49	34	17

Survey Instrument - Page 4

LEGAL SECRETARIAL TASK

	Essential	Helpful But Not Essential	Not Needed
	%	%	%
Performing Receptionist Duties			
94. Greet clients or visitors	57	11	3
95. Keep record on long distance telephone calls	51	34	14
96. Complete records of long distance telephone calls	26	60	14
97. Make introductions	21	17	11
98. Make long distance telephone calls	21	23	3
99. Place general outgoing calls	22	20	3
100. Receive telephone calls for employer	80	20	
101. Receive telephone calls from plaintiffs	86	9	6
102. Receive telephone calls from defendants	77	11	11
103. Send telegrams or cablegrams	31	54	14
104. Contact informational sources	57	37	6

PART B

INSTRUCTIONS:

Below is a list of secretarial skills and attitudes. Rank them in the order of importance by placing a "1" in front of the skill or attitude you consider to be the most important for an entry-level worker; a "2" in front of the skill you consider to be second in importance; etc.

Please add any omitted skills or attitudes that you feel are important at the bottom of the list before beginning to rank.

Ranking Order	Ability To
.....	Spell and punctuate
.....	Compose letters
.....	Use correct grammar verbally
.....	Use correct grammar in written communications
.....	Spell and use legal terminology
.....	Perform job-related tasks as listed in Part A of this survey
.....	Type at a speed of 70 words per minute (Please circle one of the above)
.....	Get along with co-workers
.....	Be invisible
.....	Be enthusiastic
	Other _____

I deeply appreciate your taking the time to complete this survey. When completed, simply mail it in the attached self-addressed, stamped envelope.

Margaret Hamilton, Teacher
 Legal Office Procedures
 Norfolk Technical Vocational Center
 1350 N. Military Highway
 Norfolk, VA 23502
 Phone: 461-5516

Part "B"

In arriving at a quantitative ranking of the 10 skills and attitudes in Part "B," the researcher placed an inverse point value on the respondents' ranks; for example, if spelling/punctuation was ranked first by respondent "A," a value of 10 points was assigned to that ability; if respondent "B" ranked spelling/punctuation second, a value of 9 points was assigned; a ranking of third by respondent "C," a value of 8 was assigned, etc. (Values from nine questionnaires were not tabulated because of various reasons which made the information invalid.)

When the total point values were computed, the results were as follows from the highest point values to the lowest:

Ability to:	Total Point Value*
Spell and punctuate	240
Use correct grammar (written)	211
Use correct grammar (verbal)	190
Typewrite	153
Spell and use legal terminology	124
Be enthusiastic	117
Get along with co workers	112
Perform job-specific tasks	111
Compose letters	104
Be innovative	90

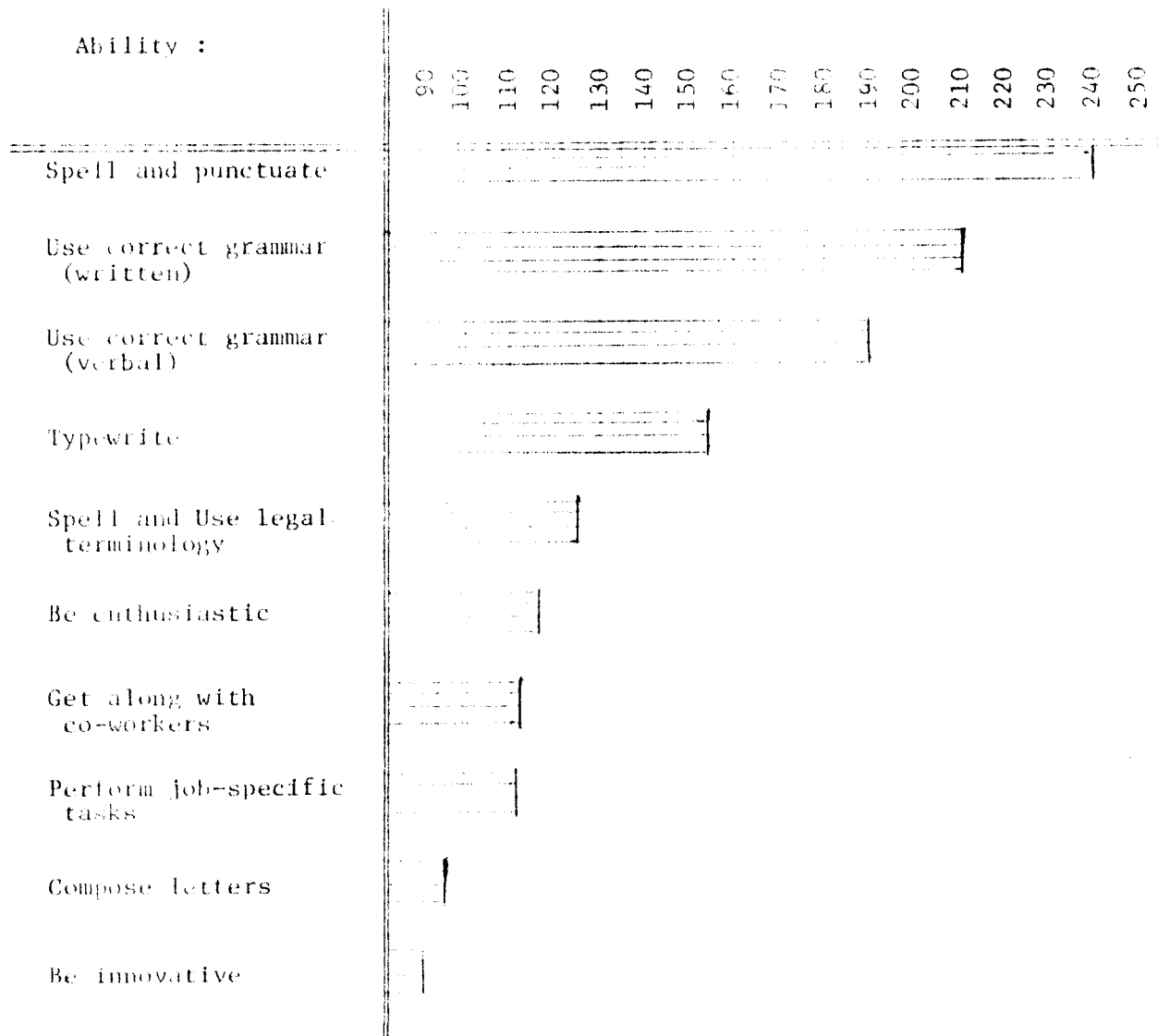
These values are graphically illustrated by the bar graph on the following page.

*A perfect point value would have been 260 (every respondent ranked that particular item first.)

QUANTITATIVE RANKING OF QUESTIONNAIRES - PART B

A Score of 260 Represents a Perfect Score

(Ranked first by all respondents)



CHAPTER V
CONCLUSIONS

In teaching a typical legal secretarial program, teachers must realistically choose to develop those basic skills and proficiencies that will permit students to find employment in legal offices and to move in time into positions of responsibility and employee satisfaction. It is evident that a three-hour-per-day, one-year program does not provide sufficient time to develop a high-level of proficiency in each of the 104 tasks listed in the V-TECS Catalog.

Obviously, certain tasks must be omitted from an educational program to be later learned on the job. The researcher suggests that those tasks indicated by a score of 50 percent or above in Column 1, "Essential," be included in a legal secretarial course of study, if time permits.

If one examines the 50 percent or more cutoff, it is clear that certain study areas are more important for entry-level success than others. The following areas would need concentration in the classroom:

- Performing General Typing Duties
- Preparing Client Documents
- Preparing CERTAIN Court Documents
- Performing Mail Handling Duties
- Performing Filing Duties
- Performing Receptionist Duties.

Within these general areas, there are tasks falling into the below 50 percent cutoff which could be omitted. In

addition, there are a number of tasks in the general areas not listed previously which would bear including because of the importance attributed to those tasks by the respondents (See Pages 25 to 28).

In Part "B" the respondents ranked job-specific tasks as seventh in importance. The researcher would recommend, therefore, that a teacher, before moving a student into the learning of job-specific tasks, make certain that he/she has a high level of proficiency in the following areas:

- Spelling and punctuation
- Use of correct grammar in written communications
- Use of correct grammar in verbal communications
- Typewriting
- Use and spelling of legal terminology.

Summary

The researcher's overall conclusions from this study echo the views set forth in Chapter II of those employers who urge vocational teachers to emphasize mastery of basic skills either prior to or concurrently with the teaching of job-specific skills. This is not to say that teachers can omit teaching job-specific skills; only that mastery of basic skills must not be relegated to second place.

Most of the comments (see appendix) made by respondents indicated a need for developing basic skills and professional attitudes as a first priority. There seemed to be a general consensus that an employee with good basic skills, initiative, and good judgment can become a successful legal secretary.

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Norfolk Technical Vocational Center

1100 MILITARY HIGHWAY
NORFOLK, VIRGINIA 23502

April 10, 1981

Ms. Linda C. Johnson
c/o Jeremiah A. Denton, III, Esquire
120 S. Lynnhaven Road, Suite 200
Virginia Beach, VA 23452

Dear Ms. Johnson:

I teach Legal Office Procedures at the Norfolk Technical Vocational Center and am asking for the help of the members of the Norfolk-Portsmouth Legal Secretaries Association on a research project.

The purpose of the research is to determine what tasks are performed in local legal offices by secretaries and what skills you would expect an ENTRY-LEVEL worker to be proficient in BEFORE employment in your office. The results of this survey will help me to develop the curriculum in the class-room to more closely parallel the needs of the legal community.

As I missed seeing you at the last Legal Secretaries meeting, I am enclosing a copy of the survey with this letter. Would you please take a few minutes to complete it and return it to me within one week.

When completing the survey, keep in mind that the survey is to determine what skills are necessary for an ENTRY-LEVEL worker to have developed PRIOR to applying for employment in your office.

When you have completed the survey, just drop it in the mail in the envelope that is enclosed.

Thank you for your help.

Sincerely yours,

A handwritten signature in cursive script that reads "Margaret Hamilton".

Margaret Hamilton, Teacher
Legal Office Procedures

RESPONDENTS' COMMENTS

The following comments were written in the "Other" section of Part "B":

Good phone manners!

If you are innovative, enthusiastic, easy to work with, and possess basic skills that are good, you can be trained to do anything in a law office! Without basic skills, the others are unimportant!

Ability to learn procedures quickly (without repetitive instruction required)

I don't feel I can place a "rank" on the importance of these skills. They are all of the utmost importance in my office. I have interviewed applicants for 12 years and found that very few were skilled in grammar and punctuation. A typist is no greater at 100 wpm than at 40 wpm if she has no idea where to place a comma.

I can't stress enough how important decent spelling and grammar are! When these are present, with a little common sense, the rest will follow!

Thirst for knowledge (whys, whats, and fors)

Be courteous

It is important to know the Courts and their procedures - How they want their pleadings set up, etc. There is also docket calls, praecipes, and docket sheets, which are very important. Also, keeping a calendar showing dates each and every attorney has something scheduled; trials, depositions, conferences, etc.

Perfection (in typing), not speed is required.

Loyalty, confidentiality, neatness

I cannot separate these three items: (spell and punctuate, spell and use legal terminology, use correct grammar in written communications) they are all essential.

Ability to work under pressure and cope with stress - I know you cannot teach this but it is an essential quality and I believe frank discussions would be helpful, particularly with young students. Also - you do not mention any mathematical ability or use of calculators - most legal secretaries need this.

RESPONDENTS' COMMENTS, Continued

It is important to an employer that his/her employee be well groomed, polite, and helpful to his/her clients. An employee's appearance and attitude is very important. Skills come next and specific tasks can be learned later.

Hold professional attitude. Know how to use dictionary.

Take initiative

The majority of tasks mentioned in Items 1 thru 93 are somewhat complicated to expect a beginning legal secretary to be proficient. Most of this knowledge comes with experience.

Proper telephone procedure (may make the difference in obtaining new clients)

I feel that a class of this type would truly be beneficial to anyone interested in entering the legal field. Of course, there is no better teacher than experience, but this sounds like a close second. It was difficult to determine the difference between "essential" and "helpful, but not essential" inasmuch as many employers are willing to work with a person to learn, with eventual improvement. It would be helpful to anyone to know a little something about each item listed on the survey, but I doubt there are many employers who would not hire an individual for lack of proficiency. The main attention should be directed toward skills and attitude. When I graduated from high school I searched for a school with this type of program, but found that I could only get this through experience. Best of luck with your thesis and research.