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A Suggested Integrated Course of Study For a Secretarial Studies Program at Bonneville High School

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A SUGGESTED INTEGRATED COURSE OF STUDY FOR A SECRETARIAL STUDIES

PROGRAM AT BONNEVILLE HIGH SCHOOL

by

Brenda A. Wilde

A report submitted in partial fulfillment
of the requirements for the degree

of

MASTER OF SCIENCE

in

Business Education

Plan B

UTAH STATE UNIVERSITY
Logan, Utah

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CHAPTER I

INTRODUCTION

Speeches are given and articles are written about the changing dimensions of the world of work. As knowledge increases and improvements are made in the field of business, jobs vary accordingly. Since change is inevitable and desirable, business education courses need to prepare students for tomorrow.

Rowe states that:

Business education subject matter is neither static nor parochial. Electronics have accelerated the world's business and is creating a near revolution in our vocational business education classroom.¹

This near revolution mentioned by Rowe has caused me to ask, "Are my students going out into the business world knowing what is expected of them? Are my class projects meaningful? Am I doing all I can to bridge the gap between school and that first job?" The answer to these questions can be found by evaluating and appraising vocational programs in terms of the needs of the students and the business community.

In order to meet the changing needs of business education, teachers must plan. Rowe said, "The development and periodic revision of courses of study or syllabi is the first step toward improvement of instruction."²

¹John L. Rowe, "Developing Syllabi and Course Content in Business Education," National Business Education Quarterly, 33:36, Summer, 1965.

²Ibid.

Statement of Problem

This project constitutes the preparation of a course of study for a Secretarial Studies program. There are five characteristics of this course of study:

1. It is designed to be vocational in nature.
2. It is designed to integrate skills, knowledges, and understandings.
3. It is designed to include instruction in the following subject areas: advanced shorthand, transcription, advanced typewriting, office procedures, and business machines.
4. It is designed for instruction to be given for 100 minutes each day, five days a week.
5. It is designed to replace the second-year shorthand course in the business curriculum at Bonneville High School.

Purpose of the Study

The primary aim of stenographic training is vocational.³ Yet the teaching of shorthand as an isolated skill is not enough. The student needs training in the current practices and procedures of the business office. Teachers and businessmen alike have long recognized that office training in addition to stenographic training is desirable. Therefore, courses are offered that will provide for an integration of skills already learned, an acquisition of additional business skills, and a mastery of facts and information relevant to office operations to bridge the gap between the classroom and the office.

³Jerre Gratz, Major Issues in Business Education, Monograph 106 (Cincinnati, Ohio: South-Western Publishing Company, 1962), pp. 63-65.

The purpose of this project will be to develop a course of study for an integrated two-period secretarial studies class. This course will replace the second-year shorthand course and will be reimbursed by the Utah State Department of Public Instruction, Division of Vocational Education.

With the passage of the Vocational Act of 1963, PL 88-210, and the state plan for its implementation, "Utah State Plan for Vocational Education," funds are provided for training programs in the advanced office occupations. This training must be provided in a double-period course for eleventh and twelfth grade students with the same students in both periods, but these periods need not be consecutive. It may include any combination of vocational courses such as second-year typewriting, second-year shorthand and transcription, office practice, and office machines. A financial allowance per student enrolled in the course is given to the local school district.

Delimitations of the Study

1. This suggested course of study will be limited to the resources available to the department and the school; especially physical facilities, equipment, materials, and community cooperation.
2. The course content will be consistent with the philosophy and administrative policies of the school.

Limitations of the Study

1. This course shall follow the guidelines set up by the Utah State Department of Public Instruction, Division of Vocational Education, by including instruction in employer-employee relationships, human relation-

ships, human relations, job applications, business economics, Utah Labor Laws, and the role of worker organizations.

2. Because of equipment limitations, enrollment in this course will at present be confined to 24 students.

3. The prejudices and values of the writer in judgmental situations will limit this study.

Definition of Terms

Terms used in this paper are defined below to establish a common basis of understanding for the course of study in business education.

Secretarial Studies

"Secretarial Studies" is the course title selected for a two-period (100-minute) integrated vocational block-time class consisting of instruction in shorthand, transcription, typewriting, office procedures, and business machines.

Secretarial

Although the term "secretarial" is used at the high school level, this classification is misleading. "Stenographic" training rather than "secretarial" is one of the objectives of a vocational high school business program. However, through custom, the two terms frequently are used interchangeably. The paper that follows refers to training at the "stenographic" level, even though it is labeled "secretarial."

Block-time Class

The definition of a "block-time class" was taken from a study by Wright and refers to a class meeting for a block of time of two or more

class periods that combine or replace two or more subjects that would ordinarily be taught separately.⁴

Transcription

The term "transcription" shall be interpreted as meaning the process of converting shorthand notes into mailable typewritten copy.

Mailability

"Mailability" means that the transcript is usable, inasmuch as it follows very closely the thought of the dictation, contains no uncorrected errors, looks reasonably neat, and contains no undesirable omissions.

Vocational Education

The Vocational Education Act of 1963 states that:

The term "vocational education" means vocational or technical training or retraining which is given in schools or classes (including field or laboratory work incidental thereto) under public supervision and control or under contract with a State board or local educational agency, and is conducted as part of a program designed to fit individuals for gainful employment as semiskilled or skilled workers or technicians in recognized occupations
 . . .⁵

Procedure

The following procedure was followed in the construction of this course of study:

⁴Grace Wright, Block-Time Classes and the Core Program in the Junior High School, United States Department of Health, and Welfare, Bulletin 6 (Washington: Government Printing Office, 1958), p. 67.

⁵United States Congress, House, Committee on Education, Vocational Education Act of 1963, Public Law 88-210, Part A, 88th Cong., 1st Sess., 1963, Sec. 8.

1. Present physical facilities, equipment, and materials were inventoried and evaluated in order to make specific recommendations.

2. Printed materials by educators in the field of business and stenographic preparation were reviewed.

3. Information gained from printed materials was analyzed and compiled into a course of study using the following guidelines:

- a. Was the material up to date in content?
- b. Was the subject matter teachable with current and available resources?
- c. Was the subject matter included in other courses?
- d. Were vested interests present in the material?
- e. Were there elements, sufficiently common, that could be applied to the local situation?

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CHAPTER II

REVIEW OF LITERATURE

Many research studies have been completed and numerous articles have been written in areas related to the development of a course of study for a Secretarial Studies course. A vital part of this project was the extensive review of literature.

Literature analyzed included studies, articles, and books pertaining to several aspects of good planning: (1) course objectives, (2) organizational plans, (3) physical facilities, and (4) course content.

Course Objectives

Archer stated that the work of content development should begin with a review of established objectives. The program should provide all the learning experiences that the student requires to:

1. Attain effective mastery of the fundamental processes
2. Develop into a well-adjusted individual possessing acceptable character and personality traits
3. Build a background knowledge of business principles, office organization, and occupational information
4. Acquire a beginner's standard of competence in at least one major technical business skill such as typewriting, filing, and so on
5. Achieve effective command of related business office information and facilitating skills such as mailing, telephone technique, and the like, to function as an efficient, adaptable beginning office worker
6. Know how to look for, apply for, and select a general office job suitable to abilities and interests

7. Understand the need for continuous self-development and know how to plan an appropriate individual program for that purpose.⁶

The major objective of a course on the secretarial level according to Tonne, Popham, and Freeman should be the integration of the two basic skills, taking dictation by shorthand and transcription, with the total office environment.⁷

Frisbie listed several general objectives for secretarial office practice:

1. To develop sufficient vocational proficiency to enable the individual to enter a secretarial occupation equipped with those knowledges and understandings, skills, and attitudes which will provide a basis for successful initial performance and for future growth on the job.
2. To provide for the development of personal qualities essential to an effective member of society and to success in the business environment.
3. To provide for the acquisition of the knowledges and skills which will aid the individual in solving the problems confronting the secretarial worker.
4. To provide the basic knowledge of existing business structures and the organizational framework enabling business to operate efficiently.
5. To develop the necessary knowledges and attitudes and sharpen the tools which will provide the secretarial worker with the ability to adjust to ever-changing conditions of modern business.
6. To create a desire within each pupil to strive for constant improvement of skills, broadening of knowledges, and acquisition of attributes which make the secretarial employee a more effective business partner.

⁶Fred C. Archer, "How to Select the Course Content for Clerical Practice," National Business Education Quarterly, 28:27, December, 1959.

⁷Herbert A. Tonne, Estelle L. Popham, and M. Herbert Freeman, Methods of Teaching Business Subjects (third edition; New York: McGraw-Hill Book Company, 1965), p. 243.

7. To stimulate within each pupil the development of a professional attitude toward the company, the employer, co-workers, and work performed on the job.
8. To provide experiences which will enable the future secretarial employee to recognize the existence of a problem, possible solutions, and the ability to assess each of the solutions in terms of the situation.⁸

More specific objectives were listed by Douglas, Blanford, and Anderson.

1. To improve and coordinate the office skills learned in other courses
2. To improve, when necessary, previously acquired skills in the fundamental processes such as handwriting, English, spelling, and arithmetic
3. To understand the organization and flow of work of the business office
4. To become familiar with those reference books frequently used in the business office
5. To gain an understanding of the techniques for work simplification in the office
6. To become acquainted with the principles and procedures of data processing, the equipment, and the systems to which it can be applied
7. To become familiar with the latest office equipment, machines, and supplies
8. To become familiar with commonly used filing systems and to develop skill in filing and finding business papers
9. To develop skill in the typing of business papers and forms
10. To develop employable skill in machine transcription
11. To develop proofreading skill

⁸M. Adele Frisbie, "Objectives for and the Selection of Subject Matter for Secretarial Office Practice," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education (Somerville, New Jersey: Somerset Press, 1962), pp. 331-337.

12. To develop skill in the use of machines commonly found in the business office
13. To develop skill in the use of duplicating equipment
14. To develop skill in mailing routines and techniques
15. To develop skill in the composition of business communications
16. To develop skill in correct telephone techniques
17. To develop in students a sense of responsibility for the completion of office jobs without close supervision
18. To develop those personal traits and work habits needed in the business office
19. To acquaint students with proper techniques in applying for a job.⁹

Fundamental objectives for the teaching of advanced transcription were reported by Allen:

1. To develop the ability to produce mailable copies at an acceptable rate of speed for vocational use.
2. To increase the ability of the student to perform the basic techniques of transcription--correct and simultaneous use of shorthand, typewriting, and English grammar--so that these factors will operate automatically.
3. To develop and improve desirable character traits and ideals of conduct which will aid the students in becoming successful stenographers.¹⁰

Three other factors to take into consideration were cited by Harms and Stehr:

1. To help potential stenographic workers develop a "finished" skill in typewriting and in shorthand and transcription.

⁹Lloyd V. Douglas, James T. Blanford, and Ruth I. Anderson, Teaching Business Subjects (second edition; Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1965), pp. 273-274.

¹⁰Roscoe J. Allen, "Advanced Shorthand Transcription: A Second-Year Program," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education (Somerville, New Jersey: Somerset Press, 1962), p. 185.

2. To help potential workers see the picture of office employment more clearly by many pre-employment contacts with businessmen and women through cooperative relations with community resources.
3. To help them understand the significance of clerical competency and its important contribution to economic and industrial efficiency.¹¹

A summary of objectives reported in professional literature was made by Miller. An analysis of the listed objectives showed that emphasis was placed on three main functions: preparation, which refreshes basic business knowledges and skills, develops new skills, and develops essential personal qualities; information, which provides for the acquaintanceship of the student with the type and nature of office jobs available, as well as familiarization of the student with the methods by which business skills and knowledges may be applied to each type of job; and utilization, which provides the student with opportunities to apply business skills and knowledges acquired in school of actual or simulated office work.¹²

Organizational Plans

Since a vocational stenographic training course involved a variety of objectives and diversified course content, a variety of organizational plans were studied. There were many methods of organizing a course of this nature.

Due to the current trend toward schedule modifications and staff utilization, articles pertaining to scheduling and staff organization

¹¹Harm Harms and B. W. Stehr, Methods in Vocational Business Education (second edition; Cincinnati, Ohio: South-Western Publishing Co., 1963), p. 229.

¹²Gertrude Dubats Miller, "A Synthesis of Research Findings and Thought Pertaining to Office Practice Instruction" (unpublished Ed.D. dissertation, Indiana University, Bloomington, 1961), p. 41.

were also reviewed. Primary attention was given to flexible scheduling and team teaching because of the emphasis being placed on these organizational media by the experimental philosophy of the local school district and the fact that a block-time class could be classified as a form of flexible scheduling.

Schedule and Staff Organization

Rapid developments and fundamental changes have been made in secondary school philosophy and operation; flexible scheduling and team teaching have been among the more important concepts.

In scheduling, Bush stated that each subject, if properly taught, should include four basic types of instruction: independent and individual study, small-group instruction, laboratory instruction, and large group instruction.¹³

Allen proposed that all schedule modifications could be divided into ten categories; variable period length, variable rotation of classes, variable school year, variable class size, variable grouping of students, variable staffing, variable meeting pattern, variable total time allocated for each course, variable number of courses a student can take in any given semester, and variable required subjects in the curriculum.¹⁴

In order to describe schedules which differ from the traditional pattern, several terms have become interchangeable. According to Lobb,

¹³Robert N. Bush, "A New Design for High-School Education Assuming a Flexible Schedule," National Association of Secondary-School Principals Bulletin, 46:33, May, 1962.

¹⁴Dwight W. Allen, "First Steps in Developing a More Flexible Schedule," National Association of Secondary-School Principals Bulletin, 46:34, May, 1962.

terms such as "schedule modification," "flexible schedule," and "variable schedule" have come to mean "a change in the timetable by the day, week, or year that alters the time, room, or teacher of a group meeting."¹⁵

Bush contended that all children do not need the same amount of time to learn specific things, nor do they all come to school with equal backgrounds and talents. He advocated that some kinds of subjects would best be taught in large blocks of time and others with shortened and more frequent opportunities to practice.¹⁶

Trump explained that a more flexible arrangement would be to schedule six teachers and 180 students for a two-hour block of time to cover two subject areas. Within that two-hour block, teachers and students could divide their time among large-group instruction, small seminar-size discussion groups, and independent study.¹⁷

The block-time plan was utilized by Margrave in her study. She found that the integrated block program permitted more meaningful training because the separate topics could be related to one another more effectively, it reduced time wasted in setting up a production situation, and it lent itself to an office situation for extended projects.¹⁸

General characteristics of the block system were:

1. Two or more consecutive periods are arranged each day.

¹⁵Delbert W. Lobb, "Utilization of Staff and Resources," New Media in Teaching the Business Subjects, Third Yearbook of the National Business Education Association (Washington, D. C.: National Business Education Association, 1965), p. 23.

¹⁶Bush, op. cit., p. 30.

¹⁷J. Lloyd Trump, "Flexible Scheduling: Fad or Fundamental?" Phi Delta Kappan, 44:370, May, 1963.

¹⁸Mary Lou Margrave, "Establishing a Two Credit, Two Period Integrated Course in Secretarial Science" (unpublished Master's thesis, University of Wisconsin, Madison, 1959), 56 pp.

2. One teacher has one group of students for the entire "block" of time, or two teachers work together with one entire group.
3. Such subjects as typewriting, shorthand, dictation, transcription, spelling, grammar, office procedures, office machines, and filing are integrated similar to the way work is performed in an office. For instance, a student may practice typing and he may then practice shorthand, to be followed by instruction in grammar and spelling, preliminary to transcribing some dictation that is given to him. Then he transcribes the letters, makes the necessary enclosures, and does the necessary related filing. He may also cut stencils and do some mimeographing related to the work.
4. A detailed course of study should be prepared to be sure that an adequate amount of time is given to each phase of the subject, and definite jobs must be planned in advance. For instance, a certain block of time may be related entirely to taking dictation for two or more hours. The two or three following days may then be devoted to transcription and various related duties.¹⁹

Under the "modular concept" of flexible scheduling instead of the conventional 45- or 55-minute period, these schedules adopt a 15-, 20-, or 30-minute module. According to Trump, this would mean that instead of six periods a day, the schedule would include twelve, sixteen, or twenty-four periods in a day.²⁰

"Modular scheduling" was further explained by Cook:

More recently educational researchers have been questioning the need for all classes to meet every day of the week for the same time. "Modular scheduling" concepts, which allocate time to a given subject based upon activities and difficulty, have been developed. Without the aid of computer technology, however, it would be impossible to institute modular scheduling concepts on an individual student basis. Even with

¹⁹Suggestions for Programs of Office Practice and Procedures (Cincinnati, Ohio: South-Western Publishing Company, 1960), p. 4.

²⁰Trump, op. cit., p. 368.

the aid of a computer, it is not a foolproof process; but further research will help to refine the techniques.²¹

The Brookhurst plan, an experiment in flexible scheduling discussed by Hofmann, was based on a schedule which changed daily according to requests for time and students submitted by teams of teachers. Teachers were able to request a single student or as many as 350 for lengths of time which varied from twenty minutes to a full day. Elective subjects, including business education courses, were taught on a project basis; that is, the student signed a project sheet agreeing to complete a certain amount of work. It was up to the elective teacher to decide how much work must be done to earn a semester's credit. A highly gifted or highly motivated student could take a greater number of electives than would be possible in a rigid scheduling plan.²²

Under the Canyon del Oro design, a teacher-controlled schedule was developed. The schedule changed every day and no student or teacher repeated the same daily sequence. Requests were submitted by teachers two days in advance for the number of classes they desired; the size of the group they wanted; the amount of time they needed; and other conditions which should be considered such as audio-visual materials, special room arrangements, or quiet areas for examinations. This program was developed based on the following assumptions:

1. Not all teaching jobs need to be the same.
2. All classes in all subjects need not meet every day.

²¹Fred S. Cook, "Implications of Educational Technology," Business Education Meets the Challenges of Change, Fourth Yearbook of the National Business Education Association (Washington, D. C.: National Business Education Association, 1966), pp. 180-181.

²²Elayne B. Hofmann, "The Brookhurst Plan," NEA Journal, 54:50-52, September, 1965.

3. All classes need not meet the same number of periods per week or the same amount of time each day.
4. Students are capable of assuming responsibilities.
5. Learning is more important than teaching, and learning can take place without the teacher.
6. Substantial improvement must take place in the instructional program, and the teacher has the obligation to innovate and invent ways to improve instruction.²³

Staff utilization techniques have grown out of effort to make better use of professional talents. Staff utilization encompasses a number of approaches including team teaching.

Iannizzi and Robinson described three common methods of team teaching. The single-subject method was defined as utilizing two or more teachers of the same subject scheduled side by side; the school within a school method was defined as utilizing four to seven teachers responsible for the instruction of the same body of students over an interval of two or four years; and the multiple-subject team was defined as utilizing teachers of different subjects who have been given a block of time in which to work together. Iannizzi and Robinson concluded that business education seemed to be primarily concerned with the single-subject type of team teaching.²⁴

In order to make team teaching possible, two mechanical methods of scheduling were discussed by Hoffman. In one method, more than one section of a course was scheduled at one time with the teachers rotating between the classes. The other method staggered the preparation

²³Robert Dunsheath and Don Glines, "The Canyon del Oro Design" (Tucson, Arizona: Amphitheater Public Schools, 1963), p. 1.

²⁴Elizabeth Iannizzi and Charles Robinson, "Team Teaching Should You Attempt it?" The Journal of Business Education, 38:274, April, 1963.

or planning periods of teachers so that they could vary their free period according to the unit on which they were working.²⁵

Advantages and disadvantages of team teaching were cited by Brown. He stated that: Team teaching provides an opportunity to divide classes for large-group, small-group, and individual instruction. Teachers have an opportunity to specialize and thus to teach in their area of greatest interest. More careful preparation can result. Several disadvantages were also stated: A great deal of planning time must be made available to the teachers. The necessary classroom facilities must be available. The team teacher can fall into a rut and use the same materials year after year. Difficulty can arise in getting teachers to work in close cooperation and agree on the major decisions. Team teaching involves scheduling problems for administrators.²⁶

Flexible scheduling and team teaching have a close relationship. Lobb said, "Whether a school district begins with team teaching or flexible scheduling, both will probably be introduced eventually, merging into a total pattern of staff utilization."²⁷

Caution was voiced by Lanham in writing about the dangers of folklore and fadism in organization. He stated that:

The caution is necessary since untested but accepted classroom practices (folklore) may defeat both the best-intentioned organization pattern and the best-conceived curriculum to meet defensible purposes. In the same way new but untested practice (fadism) is frequently accepted in the business classroom without regard to what is supposed to happen to boys and girls. . . . This caution is even

²⁵ Jerry Hoffman, "Team Teaching Spells Progress in Business Education," Business Education World, 42:13, September, 1961.

²⁶ Richard D. Brown, "Questions and Answers on Team Teaching," Business Education World, 45:24, May, 1965.

²⁷ Lobb, op. cit.

more important today than formerly because many of the changed conditions for operating programs are being imposed on business education from without. For example, funds from Federal legislation may unduly influence the direction of the total field.²⁸

Classroom Organization

Any laboratory class can become bedlam if the daily work has not been well planned and effectively organized. Organization of the subject matter in a secretarial block can follow many patterns, cover many different topics. The secret of organizing has been to make preliminary plans. According to Hicks, five items should be taken care of before the first day of class:

1. Selection of text materials.
2. Checking on kind and condition of your equipment and supplies.
3. Checking on the conditions of the room itself-- lighting, bulletin boards, chalkboards, arrangement.
4. Finding out, if possible, how many students will be in the class.
5. Preparation of whatever supplementary material you need.²⁹

Five guides and supports upon which to lay the groundwork for organizing a course were discussed by Archer. They were: course texts, course outline, course schedule, laboratory organization plan, and job instruction sheets. The textbook could serve as an anchor or

²⁸Frank W. Lanham, "Folklore and Fadism in Educational Organization and Practice," Business Education Meets the Challenges of Change, Fourth Yearbook of the National Business Education Association (Washington, D. C.: National Business Education Association, 1966), p. 175.

²⁹Charles B. Hicks, "How to Organize the Subject Matter of Your Secretarial-Practice Course," Business Education World, 34:13, February, 1954.

framework around which a course could be constructed. The course outline could list the many facets of the subject that the teacher has selected that seem to be the most appropriate for the needs of the students and most feasible in terms of facilities and time available. The course schedule could give the order in which the main elements of the course should be covered and, also, an estimate of proposed distribution of class time that could be devoted to each. By following an organized laboratory plan, student assignments could be worked out in advance to avoid confusion and delay at the end of each operating cycle. Job instruction sheets could enable the student to receive guiding instructions without the immediate presence and personal guidance of the teacher.³⁰

Included in part of Anderson's article were ten basic suggestions for organizing a practice course. They include: having students assist in the administrative details of the class; having specific jobs students were to complete for each unit; using job instruction sheets in those units where they were practical; using information or handout sheets to supplement the textbook; keeping assignments flexible to allow for outside rush jobs, but avoiding interruptions unless the jobs will contribute to the students' learning; giving students actual clerical jobs to perform when such jobs were available and met the needs of the class; arranging for demonstrations of current office machines and equipment from local office equipment firms: using practice sets in such units as filing and office typewriting whenever possible; emphasizing good work habits such as arriving promptly, beginning work quickly, having all supplies needed, checking for announcements

³⁰Fred C. Archer, "Putting Flexibility in Perspective," Business Teacher, 38:15, December, 1960-January, 1961.

on the bulletin board, and keeping materials organized; assigning committees to prepare posters, charts, and other materials for the bulletin board; and having the students develop a manual which will be useful to them on their first jobs.³¹

Class organization and procedure go hand in hand. To keep in operation any given procedure requires a classroom organization that will make such a procedure possible. Miller's study revealed that the following organizational plans or patterns were used singly or in combination: battery, rotation, job-hour, dictation, typewriting, recitation, integrated, and cooperative. The selection of a plan was based largely upon the physical facilities as well as the objectives of the course.³²

Instruction has generally been taught under one of the following three patterns as outlined in the Utah Business and Marketing Education Guide:

1. Rotating Plan: In the rotating plan the class is divided into groups, each group working at a different task. At intervals the class "rotates." An entire group, with the exception of one of the more able students, moves on to another task. The student selected remains behind to instruct the members of the next group in the task.
2. Battery Plan: Under this plan each student in the class is furnished with his own piece of equipment. Since office equipment is expensive, few schools use the Battery Plan except for the teaching of filing and the teaching of small computing machines. Consequently, the Battery Plan is generally used in combination with some other plan.

³¹Ruth I. Anderson, "Twenty-five Suggestions for the Teaching of Clerical Practice," Business Education Forum, 20:22, 24, March, 1966.

³²Miller, op. cit., p. 81.

3. Integrated or Actual Office Plan: Under this plan the classroom is laid out as an actual office, and each student functions as a different office employee; one acting as mail clerk, one as billing clerk, and so on. At certain intervals all students are assigned to new positions in the office so that eventually each has had experience in all the work stations. This plan is ideal if the number of students in the class corresponds to the number of positions in the office.³³

The "rotational plan" has become the most widely used means of teaching business machines, inasmuch as training may be offered with a relatively low investment in equipment. Ruegg called rotational scheduling the process by which four common factors--students, equipment and supplies, time, and units of instruction--will be organized and evaluated in light of each course situation until the best possible program has been developed.³⁴

Teachers commented on establishing a class using the "integrated plan." This plan has also been called the "model office plan." In the classroom office or the "integrated plan" which Barbour used, four departmental offices were possible: sales, accounts receivable, and billing; purchases and accounts payable; inventory and production control; and payroll. Each department used six employees. Usually there were two typists, two machine operators, and two clerks.³⁵

In Florida, classrooms were equipped to simulate actual office conditions and a three-hour block of time was set aside for concentrated

³³Utah State Department of Public Instruction, Business and Marketing Education Guide (Salt Lake City, Utah: Utah State Department of Public Instruction, 1965), pp. 62-63.

³⁴Robert J. Ruegg, "Starting from Scratch in Office Practice," Business Education World, 37:32-33, February, 1957.

³⁵Edna H. Barbour, "Teach Office Practice in a Classroom Office," American Business Education, 16:124, December, 1959.

instruction purposes. This block program coordinated and integrated office practice, business English, typewriting, and shorthand transcription into a planned sequence of activities. Naturally, students must have earned credit in beginning typewriting and shorthand prior to being admitted to the program. Upon satisfactory completion of the course, students received credit in office practice, business English, and shorthand.³⁶

House discussed the possibility of using the "model office plan" as a supplemental means of presentation. By using the "model office plan" at the end of the year, the materials learned during the year could be reviewed.³⁷

The "job hour" plan has been described by several teachers, but an article on the subject that was written several years ago by Kalbaugh appeared to be the most feasible and workable. His plan was originated to bring realism to the classroom. It may be called a way of organizing instruction so that students get the feel of being responsible employees. There were two basic elements to the plan: first, the use of "pay checks" instead of ordinary grades; and, second, the organization of assignments--whether they were textbook assignments or special projects undertaken as a service to the school--into "jobs for which specific job descriptions were prepared."³⁸

³⁶Joseph R. Barkley, "Block Scheduling Provides for Concentrated Office Education," Business Education Forum, 17:21, March, 1963.

³⁷Clifford R. House, "Teaching Office Practice, a Family of Courses," The Balance Sheet, 41:209, January, 1960.

³⁸A. J. Kalbaugh, "Methods in Office Practice. 5: How to Set Up and Use the 'Job Hour' Plan," Business Education World, 32:240, January, 1952.

Another modification would be to combine a cooperative training program with the class. This procedure was advocated by Cook inasmuch as it would make "the entire course more meaningful and most certainly help the student gain an idea of how an office job must be handled."³⁹

A cooperative occupational training program was defined by Smutz as a plan which would correlate actual work experience in the community with classroom instruction under the supervision of a coordinator or teacher-coordinator who was occupationally competent. Under this plan the community and the school cooperate to give occupational instruction to students who want it, need it, and can profit by it. The primary purpose of the program would be to serve the occupational needs of the student and introduce the high school student to the world of work in the field of his career objective.⁴⁰

General characteristics of the cooperative or part-time plan:

1. A student spends part time in school and part time on an actual job.
2. Two students may hold one job, filling it full time by alternating, or one person may fill a job by working only a few hours a day or a few days a week.
3. In most cases students are paid for this work, but in other cases they perform the work in order to get the experience.
4. Under this plan it is vitally necessary for the teacher or school co-ordinator to maintain constant contact with the employers to be sure that students and employers are operating harmoniously.
5. Usually only selected students, properly qualified, are given an opportunity for this kind of work.

³⁹Fred S. Cook, "An Effective Office Practice Course for the Small High School," The National Business Education Quarterly, 21:29, May, 1954.

⁴⁰Frances Smutz, "Cooperative Work Programs for Secondary School Students," Business Education Forum, 16:15, 20, February, 1962.

6. Classroom instruction is closely correlated with the work experience. The classroom instruction is often referred to as the co-ordination class. Special emphasis is placed on interpreting the work experience of the student. The teacher helps individual students to overcome their difficulties on the job and to develop special skills and knowledges needed on the job. A general over-all training in office practice is also advisable.⁴¹

Harms and Stehr added a different shade of meaning, but the intent of the cooperative or work experience program was further explained:

Work experience of this kind combines practice with theory, a tenet that is rapidly becoming a part of the accepted philosophy of modern education. Such programs offer experience extremely difficult to obtain in school. They develop certain insights that lead to business intelligence. Students learn how to work, a skill that some feel is rapidly becoming extinct, and they learn how to get along with people. Part-time education offers the student an opportunity to satisfy his curiosity for work and enables him to earn part of his way through school.⁴²

Included in the secretarial curricula will be instructional units best taught on each of the common plans. Classes can and have been organized involving a combination of plans from several or all groups. For example, three plans might be used: (a) the battery plan for dictation, transcription, theory, and study of secretarial duties; (b) the rotation plan for machine operation; and (c) the integrated or model office laboratory plan for office procedures and routines.

Regardless of the organizational plan adopted, Harms and Stehr recommended that student supervisors or assistants assist in the following responsibilities:

1. Obtain work assignments from teacher and distribute them to class

⁴¹Suggestions for Programs of Office Practice and Procedures, *op. cit.*, p. 6.

⁴²Harms and Stehr, *op. cit.*, pp. 270-271.

2. Check student performance.
3. Assist members of the class in following rotation schedule, including the supervisory techniques.
4. Make certain that all students work the full period.
5. Check finished work and see that it is properly filed.
6. See that supplies are available and that they are used economically.
7. See that all materials are put away promptly and that machines are left in an orderly condition.⁴³

Physical Facilities

The physical facilities--room space arrangements, furniture, machines, appliances, and supplies--were the tools necessary to implement a course of study. Specific ideas on what was needed for a well-planned laboratory were studied.

Physical Layout

The arrangement of furniture and equipment in any room depends upon several factors:

Obviously, a given room should be planned in terms of the major instructional program it will house. This should involve consideration of the exact type of equipment to be used in a given type of instructional program, and the way the equipment will be placed in order to obtain such desired results as freedom of movement in the room and adequate working areas and surfaces. More specifically, to obtain optimum results from planning, specifications should be developed for each room and should involve considerations of such factors as the following; number of stations, aisle clearances, desk and/or table dimensions, clearances between stations, and space for storage.⁴⁴

⁴³Ibid., pp. 247, 249

⁴⁴Layouts and Facilities for Business Education, Monograph 81 (Cincinnati, Ohio: South-Western Publishing Company, 1953), p. 4.

The first step in laying out a laboratory should be that of analysis, such as set forth by Collins:

The teacher's first step should be that of analysis, for he should determine:

1. The exact measurements of the space available--making a distinction between usable and unusable space
2. The physical features--shape, obstructions such as radiators, or posts, window and door positions, location of blackboards and bulletin boards, closets and wardrobes
3. The use to which the room will be put--if used by classes other than office practice or if used as a passageway from other rooms
4. The furnishings and minor equipment available or to be supplied--sizes and characteristics
5. The number of students per class--actual and potential
6. The plan of instruction--rotation, integrated, battery, etc.
7. The possibility for acquiring additional equipment and furnishings
8. The possibility of a change in enrollment in office practice--either in character or in number⁴⁵

A check list was developed by Selden to aid in planning business education facilities. He felt that nine factors should be taken into consideration when planning an office or secretarial practice room:

1. Size: 1,000-1,440 square feet
2. At least 15 running feet of chalkboard and bulletin board above chalkboard and in other areas of room
3. Lavatory facilities
4. Acoustical treatment of room

⁴⁵Marian Josephine Collins, Handbook for Office Practice Teachers, Monograph 91 (Cincinnati, Ohio: South-Western Publishing Company, 1954), p. 21.

5. Determine the maximum number of students to be enrolled in one class so each desk (minimum size, 720 square inches) can be placed in the room with adequate aisle space (30 inches)
6. Double electric outlet (extend above the floor) is included under each desk that will have an electrically operated machine
7. Determine the location of the teacher's desk and filing cabinets
8. Make plans for adequate storage space
9. Master switch operated by a key⁴⁶

Suggestions for the physical planning of a business laboratory was the subject of an article by the Geskes. They suggested: keeping outlets and cords out of aisles and other traffic lanes by carefully planning before wiring, including a master electrical switch, using the machine-family grouping plan, determining sectional arrangements by their convenient location to supplies, locating washing facilities somewhere easily accessible from all parts of the room, and utilizing blank wall space in the room by providing ample chalkboard and bulletin board areas or bookshelves and storage cabinets.⁴⁷

Archer cautioned that closets, wall and counter cabinets, shelves, and reserve stock areas should receive at least as much planning as machines and other equipment. In fact, the storage problem should take priority because it affects every phase of classroom operation, even the non-laboratory phase.⁴⁸

⁴⁶William Selden, Planning the Facilities for Business Education, Monograph 112 (Cincinnati, Ohio: South-Western Publishing Company, 1964), p. 21.

⁴⁷Bob L. Geske and Joann M. Geske, "How to Plan your Office Practice Lab," Business Education World, 42:15-17, March, 1962.

⁴⁸Fred C. Archer, "Getting Those Supplies Under Control," Business Teacher, 37:15, February, 1960.

The challenge of planning a room arrangement with sufficient room for a beehive of activity was discussed by several business educators. General suggestions pertaining to laying out the laboratory were made by Baltor: (1) Room layout should be a very personal thing. (2) A perfect layout does not exist. (3) As teachers and students live and work in a room, they should constantly suggest and make changes to provide for more comfort and efficiency. (4) Office furniture specialists in the community will be glad to make suggestions. (5) The layout chosen should make it a pleasant place to work.⁴⁹

Several articles, including one prepared by Connelly, suggested that the course should be taught in an office atmosphere where the furniture in the room was arranged so that it looks as unlike a school-room as possible. This was pointed out in her statement that:

. . . Practice classes should be taught in an office laboratory, just as we teach science in a science laboratory. One room in the high school should be converted into a model office, and this room should be used by business preparatory students only. There should be enough equipment so that the student can get the "feel" of an office and participate in the clerical processes.⁵⁰

The role of the teacher in creating an office atmosphere was emphasized by Allee and Seufer:

The teacher has the responsibility to "set the stage" for this type of classroom atmosphere, which is characterized by work-station arrangement of like equipment, a freedom of student movement in the classroom where necessary for performance of duties, realistic job assignments, the teaching of co-operation in working

⁴⁹ Nathan Baltor, "I Like the Service Plan for Secretarial or Clerical Practice," The Balance Sheet, 41:302, March, 1960.

⁵⁰ Mary E. Connelly, "Successful Unit Planning in Clerical Practice," Business Education Forum, 6:7, February, 1952.

with fellow students and with the teacher, and a personal responsibility for the job done by acceptable office standards.⁵¹

Harms and Stehr recommended that a room arrangement provide for five definite work areas: duplicating area; filing instruction area; office machine area; shorthand-transcription area; and reception and "management" area.⁵²

Hicks commented on classroom arrangement:

The traditional arrangement--all typewriters in rows, or all recitation chairs--is not suitable for secretarial practice. Perhaps the traditional arrangement is the only feasible one, considering space limitations and the use of the room by other classes. Ideally, however, the secretarial practice room should have work centers--certain areas for filing, for typing work, for computing machines, for storage of supplies, etc.⁵³

Furniture

Ideas for selecting furniture were discussed by the Geskes:

In selecting desks and tables, one should insist on having washable, nonglare tops. . . . If stationary desks are selected, adjustable chairs should be considered. For dictating-machine transcription, it is a good idea to use L-shaped desks with a lower section off the side for the typewriter and the higher main desk section for the transcribing unit, stationery, books, erasers, and other paraphernalia. . . . Work tables that hold several machines can be used if space considerations require that kind of consolidation. Tables tend to crowd the students, often make student "co-operation" too easy and are not adjustable to student heights.⁵⁴

⁵¹W. A. Allee and Elizabeth Seuffer, "How to Teach Clerical Practice," National Business Education Quarterly, 28:37, December, 1959.

⁵²Harms and Stehr, op. cit., p. 260.

⁵³Charles B. Hicks, "Realism in Secretarial Practice," Business Education World, 33:234, January, 1953.

⁵⁴Geske and Geske, op. cit., p. 15.

Stationary rather than adjustable desks or tables were recommended by Selden. This recommendation was made because adjustable desks cost almost twice as much as a fixed-top desk, students rarely raise or lower an adjustable desk to fit their needs, and mechanism on an adjustable desk may break and need to be repaired.⁵⁵

Selden felt that an ideal desk would be an L-shaped desk. In a large school with more than one room with typewriters, the L-shaped desk could be justified for advanced work in shorthand and typewriting as well as stenographic office practice.⁵⁶

In the laboratory, several desk styles may be desirable; but it would appear that the most versatile and most practical desk would be the newer modular or L-shaped desks, according to Boggs. He also recommended large work tables in order to accommodate various odd jobs and properly designed tables to accommodate mathematical processing machines. For the sake of appearance, ease of supervision, and arrangement of the room, he cautioned that it was highly desirable that different styles and sizes of desks be held to a minimum.⁵⁷

Several authors, including the Geskes, recommended that an executive or secretarial desk be purchased. Students would take turns being assigned to this model desk and be responsible for the condition, neatness, and efficiency of the arrangement.⁵⁸

⁵⁵Selden, op. cit., pp. 10-11.

⁵⁶Ibid.

⁵⁷Lohnie Boggs, "Basic Considerations for Secretarial Office Practice," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education (Somerville, New Jersey: Somerset Press, 1962), pp. 363-364.

⁵⁸Geske and Geske, op. cit., p. 16.

Boggs suggested two types of chairs for secretarial practice laboratories. He recommended straight chairs for use at work tables and contour swivel chairs at all desks where office equipment or appliances were being used. Both the contour swivel chairs and the equipment desks or tables may be adjustable, but at least one should be.⁵⁹

Equipment

Much has been written about the selection of the equipment necessary for an adequate vocational course. Basic to the purchase of any equipment or the development of special facilities must be the philosophy regarding the outcomes desired. Walker pointed out this factor:

Sound planning for equipment should begin with the established objectives of the school and more particularly with the purposes of the business department. The curriculum is essentially a written expression of the educational objectives. . . . Criteria for the purchase of instructional equipment will be twofold: the department must (1) meet the urgent need to obtain equipment to facilitate the mastery of such basic skills as typewriting, shorthand, filing, arithmetic, and keyboard manipulation, and (2) provide certain desirable machines and appliances on which operational skills must be developed as an independent tool.⁶⁰

Guidelines for selecting equipment were set forth by the State of Utah Department of Public Instruction:

1. The equipment should further the aims of business education in the school.
2. The equipment should fill the curriculum needs of the school.
3. The equipment should be of an acceptable type used in the area of employment.

⁵⁹Boggs, op. cit., p. 364.

⁶⁰Arthur L. Walker, "Planning and Budgeting for the Equipment You Need--In the Smaller School," Business Education World, 40:9, April, 1960.

4. The equipment should require skill in its operation, and not just acquaintanceship.
5. The equipment should be modern and of the type used in industry.⁶¹

Douglas, Blanford, and Anderson recommended that the following purchases be avoided: machines that were expensive and complicated; machines whose operations were extremely simple and can be learned quickly; machines that will soon become obsolete; or machines which were highly specialized and should be learned on the job.⁶²

Hicks cautioned that:

It is important that, before you "go after" equipment, you separate the ideal from the minimum. All of us would like the ideal: all of us can recite long lists of machines and equipment that we should like to have. What we must have, as a minimum, may be something much more reachable. . . . You must determine what you need for your program in your school, to serve your students.⁶³

Many studies have been undertaken to assist in determining the types of machines on which training should be given and miscellaneous equipment essential to establishing a secretarial or office laboratory. Since equipment purchases must be justified to school administrators and existing equipment utilized, articles and studies recommending equipment for office appliance courses and current trends in equipment usage were reviewed.

Harms and Stehr felt that for the usual office practice setup, the equipment has become somewhat standardized. A good course could

⁶¹Utah State Department of Public Instruction, op. cit., p. 64.

⁶²Douglas, et. al., op. cit., p. 278.

⁶³Charles B. Hicks, "How to Get the Equipment You Need for Your Secretarial-Practice Course," Business Education World, 34:23, January, 1954.

generally be built on such basic equipment as the ten-key adding-listing machine, rotary calculator, and various duplicating machines. Equipment of a specialized type, such as bookkeeping and billing machines, should be carefully studied from the standpoint of real need.⁶⁴

Douglas, Blanford, and Anderson felt that a great deal of time should not be devoted to instruction on the stencil or gelatin duplicators, since they were rapidly being replaced by the spirit or fluid and offset duplicators.⁶⁵

Purchasing offset duplicating equipment was mentioned in Archer's article. He stated that a secretary or stenographer would probably never be called upon to operate an offset duplicator. Yet while the teacher may not be justified in obtaining an offset duplicator to provide laboratory experience, she should make certain that the students understand what the offset process is and how it works.⁶⁶

According to Buchen, three machines should dominate the office machines class: the ten-key adding machine, the transcription machine, and the keypunch machine. He suggested that because of the versatility and wide use of the ten-key adding machine in modern offices it could be used in place of the key-driven calculator and the rotary calculator.⁶⁷

Adding-listing machines, calculating machines, and the electric typewriter were considered by Thompson as basic to any business machine

⁶⁴Harms and Stehr, op. cit., p. 262.

⁶⁵Douglas, et. al., op. cit., pp. 278-279.

⁶⁶Fred C. Archer, "Including the Offset Process in Modern Office Practice," Business Teacher, 38:15, March, 1961.

⁶⁷Harvey A. Buchen, "Teach These Basic Office Machines," The Balance Sheet, 44:303, March, 1963.

instruction. A minimum working knowledge of these three types of machines was considered essential in practically all types of office positions. He further stated that the key-driven calculator and the full-key adding machine were much too slow for today's business when the speed of modern calculators, such as the electronic calculator, have been measured in milliseconds.⁶⁸

Thompson predicted that:

Manufacturers' claims are so grand regarding existing equipment that the teaching of touch systems and a high degree of skill in operating a variety of machines appear obsolete. The simplified keyboards and the multiple automatic keys of today's equipment make the functions to be performed on the equipment of major importance.⁶⁹

The typewriters in the secretarial laboratory should be representative of those being used in the business community, stated Boggs. He suggested that both manual and electric machines be available and equipped with pica and elite type. In order to perform the special jobs expected in this course, type faces should range from micro-elite to script and to primer type.⁷⁰

Tonne, Popham, and Freeman further stated that one proportional-spacing machine, one Selectric with interchangeable elements, and one long-carriage typewriter should be included in the laboratory.⁷¹

⁶⁸Robert J. Thompson, "New Media in Teaching Business Machines," New Media in Teaching the Business Subjects, Third Yearbook of the National Business Education Association (Washington, D. C.: National Business Education Association, 1965), pp. 163-164, 168.

⁶⁹Ibid., p. 162.

⁷⁰Boggs, p. 364.

⁷¹Tonne, et. al., op. cit., p. 253.

A business machines survey was completed under the direction of Frakes in order to determine what kinds of office machines were being used in comprehensive high schools in fourteen selected large cities. The results of the survey showed that: key-driven calculators were not used as much as formerly; more ten-key adding machines and printing calculators were being used today than in years past; not many schools were giving training on offset duplicators; most schools had both ten-key and full-bank adding-listing machines with more ten-key than full-bank; and that schools generally had four rotary calculators to a room with a typical distribution pattern of three manual machines to one semi-automatic or automatic electric.⁷²

A study to determine the machines used in the offices of Portage County, Ohio, was conducted by Bogges with the ultimate objective of determining the machines needed and the content for a high school office machines course. The most frequently found machine was the typewriter. Electric typewriters were found in 23 of the 25 businesses surveyed. Next in total number of machines were calculators, adding machines, transcription machines, and duplicators. Specific common types of machines were: rotary calculators, ten-key adding machines, full-key-board adding machines, transcribing machines, and fluid duplicators.⁷³

Magsig surveyed equipment available for instructional purposes in Ohio's large high schools. The study determined that a typical

⁷²John C. Frakes, "Office Machines Setup in Comprehensive High Schools in 15 Large Cities," The Ohio Business Teacher, 23:64, April, 1963.

⁷³Violet F. Bogges, "A Survey of Selected Offices in Portage County, Ohio, to Determine Equipment Needed and Content for a High School Office Machines Course," The Ohio Business Teacher, 22:61-62, April, 1962.

school in the study had two duplicating machines, four key-driven calculators, three rotary calculators, three or four adding machines, and four voice recording machines. Schools giving indication of intent to add machines most often mentioned electric typewriters because of their widespread use in offices, listing calculators because of their possibilities in offices of the future, as well as electric rotary calculators, and IEM punch card equipment. The machine mentioned most often as being excluded in the future was the key-driven calculator.⁷⁴

Jensen compared office appliances used in Utah high schools with current business usage. He recommended that training should be provided by all high schools on electric typewriters because of their extensive use by business; that training in the use of ten-key adding machines, rotary calculators, fluid duplicators, and dictating-transcribing machines should be provided because of the popularity of these appliances; that schools should provide an opportunity for students to become acquainted with the use and applications of the full-keyboard adding machine, printing calculator, photocopier, and stencil duplicator; and that the amount of training provided on the key-driven calculator be reduced.⁷⁵

During the last five years, continued attention in professional literature has been given to multichannel shorthand laboratory equip-

⁷⁴Terry A. Magsig, "A Survey of the Office Machines Available for Classroom Instruction in Ohio's Larger High Schools," The Ohio Business Teacher, 23:57, April, 1963.

⁷⁵John R. Jensen, "An Analysis of Office Appliances Used in Utah High Schools Compared with Current Business Usage" (unpublished Master's thesis, Utah State University, Logan, 1965), pp. 58-59.

ment. Advantages, brought together from a review of literature, were cited in Coleman's study. These advantages included: (1) The student could decide what type of practice would do him the most good. (2) The shorthand laboratory lended itself to the advantages of team teaching. (3) The voice of the teacher was saved. (4) When students were allowed to progress at their own rate, their interest increased and so did the level of retention. (5) Every student could be engaged profitably in an activity commensurate with his ability at any one time. (6) A laboratory offered various speeds and could offer material of current interest. (7) Work need not stop when the teacher was absent. (8) The teacher could observe and give individual help. (9) Specialized dictation could be prepared and offered to accelerated shorthand writers.⁷⁶

Supplies

A number of writers have attempted to present lists of minimum teaching supplies needed to teach a vocational course in office education effectively.

Douglas, Blanford, and Anderson listed the following supplies: miniature filing outfits or practice sets; styli; letter opener; stencils and masters; carbons; typing paper; duplicating paper; stationery and envelopes; correction fluid; staples and staple remover; dictionary and other reference books; and small office supplies such as paper clips, pins, scotch tape, package labels, paste, rubber bands, and shears.⁷⁷

⁷⁶Brendan G. Coleman, "Making Optimum Use of a Dictation Lab," Business Education World, 45:17, May, 1965.

⁷⁷Douglas, et. al., op. cit., pp. 277-278.

Boggs listed miscellaneous supplies and reference materials needed because of the varied activities taking place in the course.⁷⁸ Another list was included by Tonne, Popham, and Freeman.⁷⁹

Archer cautioned that proper supplies must be available to keep the class operating at top efficiency and to get maximum use out of equipment. The age, condition, and quality of supplies can often make the difference between effective and ineffective performance. A program can suffer for lack of adequate supplies, and valuable equipment may be idle when a supply item runs out.⁸⁰

Course Content

Subject matter has been a major concern of business educators as revealed by the large number of professional writings and studies devoted to this topic.

Miller's study revealed that teachers' choices of subject matter were influenced by one or more of the following: courses of study, suggestions by other teachers, suggestions by businessmen, or textbooks.⁸¹

Frisbie tabulated the subject matter found in four-widely used textbooks in the area of secretarial training. The body of basic data included in the textbooks covered the following subject areas:

⁷⁸Boggs, op. cit., pp. 367-368.

⁷⁹Tonne, et. al., op. cit., pp. 253-254.

⁸⁰Fred C. Archer, "Organizing the Office Practice Course," (New York: McGraw-Hill Book Company, 1962), pp. 3-4.

⁸¹Miller, op. cit., p. 75.

Secretarial opportunities
 Personality and human relations
 Mail--incoming and outgoing
 Dictation and transcription
 Communications--letters, interoffice, telegrams, etc., telephone
 Filing
 Applying for a position
 Reports
 Receptionist work
 Transportation--passenger and merchandise
 Statistical work
 Business organization
 Calculating and adding machines, as well as other more recent
 equipment
 Reproduction processes⁸²

Responsibilities, relationships, and review, the three R's to subject matter, were discussed by Hicks. They were: responsibilities, which contained the activities and knowledges needed by a secretary on the job; relationships, which included personality traits that had been emphasized by employers as essential to success; and review activities, which were spelling, grammar, vocabulary, letter format, arithmetic computation, punctuation, capitalization, word division, shorthand skills, typewriting skills, transcription skills, and office machine skills.⁸³

Considerable attention has been given to analyzing the duties performed by secretaries in order to aid teachers in organizing units to be included in secretarial education. Casebier studied the activities and responsibilities of the secretary's average day and found that 72 per cent of the time was taken by ten major activities: typing, transcribing shorthand, taking dictation, taking breaks, using the telephone, handling mail, conferring with supervisor,

⁸²Frisbie, op. cit., p. 338.

⁸³Charles B. Hicks, "RRR's in Secretarial Practice," Business Education World, 33:177-178, December, 1952.

filing and finding materials, preparing for work and closing the day's work; and composing and typing letters. One-third of the time was spent in some form of typewriting activity. Her time study indicated an emphasis on the basic skills in secretarial work.⁸⁴

Jack cited research studies that analyzed job activities and responsibilities of secretaries. Among them was a study by John Doyle Conner who found that the handling of incoming and outgoing calls, typing inter-office communications, typing letters and reports from longhand, composing letters at the typewriter, and handling incoming and outgoing mail were the most important activities of the secretary.⁸⁵

In large schools more than one vocational office education course can be taught. A common arrangement would be to offer a secretarial or specialized course and a nonspecialized or clerical office training course. The types of activities will vary somewhat between the two types of courses. Common course content suggested by Tonne, Popham, and Freeman would include: fundamental processes, job opportunities, personal qualities, human relations, finding a job, adjustment to a job, getting ahead, office etiquette, typewriting, office organization, mailing duties, filing, telephone and telegraph, handling callers, duplicating, and adding and calculating. Specialized

⁸⁴Eleanor Casebier, "Profile of a Typical Secretary," Business Education World, 39:26-27, 33, October, 1958.

⁸⁵Margaret A. Jack, "Significant Implications From Research in Office Practice," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education (Somerville, New Jersey: Somerset Press, 1962), p. 96, citing John Doyle Conner, "A Job Activity Analysis of the Duties of Secretaries Employed in the Electronics Industry and a Study of the Importance of Technical Terminology," (unpublished Master's thesis, Boston University, Boston, 1959), 76 pp.

secretarial content would include: transcription, letter writing, voice-writing equipment, receiving callers, preparing reports, travel planning, summaries and reports, appointments, advance work in telephoning, personal records, library techniques, publicity, proofreading and checking, and supervision.⁸⁶

The role of data processing in the classroom has been the subject of many articles pertaining to course content. Several articles, including one prepared by Thompson, emphasized the importance of developing a broad, general understanding of business data processing and a knowledge of the adaptability of basic skill in available machines such as electric typewriters and ten-key adding machines to the processing of data.⁸⁷

Eight major units were recommended by Sivinski: shorthand, type-writing; transcription; letter writing; filing and office machines; job finding and job behavior; preparing business forms; and telephone, reception, and telegraph service.⁸⁸

In Margrave's two-period, two-credit terminal course in stenographic preparation, 39 per cent of the time was spent on shorthand speed building and transcription; 13 per cent of the time was spent on filing; 23 per cent of the time was spent on office machines; and 16 per cent of the time was spent on special office procedure topics and tests.⁸⁹

⁸⁶Tonne, et. al., op. cit., p. 245.

⁸⁷Thompson, op. cit., pp. 164-165.

⁸⁸Joan M. Sivinski, "A Course of Study for the Small and the Average Size High School in Minnesota Combining Office Practice with Stenography II" (unpublished Master's thesis, University of Minnesota, Minneapolis, 1955), 122 pp.

⁸⁹Margrave, op. cit.

Courses of study found in 19 professional writings analyzed by Miller contained 39 different topics. Yet no one course of study contained all of the following topics:

Applying for a job
 Banking
 Bookkeeping
 Business behavior
 Business English
 Business forms
 Civil service
 Clerical arithmetic
 Dictation and transcription
 Duplicating
 Ethics
 Filing
 General insurance
 General office duties
 Handling correspondence
 Handling mail
 Life insurance
 Multiple carbons
 Negotiable instruments
 Office machines
 Office organization
 Office supplies
 Office terminology
 Payroll
 Personality traits
 Planning a career
 Proofreading
 Receptionist
 Spelling
 Sources of information
 Spending plans
 Standards
 Stock exchange operation
 Syllabication
 Telephone, telegraph, and cable
 Types of business
 Transportation
 Typewritten work
 Work experience⁹⁰

The topics suggested by Miller centered around three areas:
 technical skills, which included stenography, typewriting, record-

⁹⁰Miller, op. cit., p. 70.

keeping, filing, and operating office equipment; technical knowledges, which included business practices and procedures pertaining to banking, business arithmetic, business law, business communication, and office organization; and nontechnical knowledges, which included the development of personal traits desirable for successful employment.⁹¹

Summary of Literature

The literature included an analysis of several aspects of course planning: course objectives, organizational plans, physical facilities, and course content. Emphasis on listed objectives was placed on preparation, information, and utilization. A variety of organizational plans were studied including schedule, staff, and classroom organization. Flexible scheduling and team teaching were cited as being important concepts in schedule and staff organization. A block-time course was classified as a form of flexible scheduling. As a form of staff organization, the single-subject type of team teaching was primarily used in the teaching of business education courses. Classroom organizational patterns included: battery, rotation, job-hour dictation, typewriting, recitation, integrated, and cooperative. A class could be organized involving a combination of these patterns, but the rotating plan was the leading classroom organization pattern selected by teachers in the teaching of business machines. Physical layout, furniture, equipment, and supplies were the physical facilities reviewed. The physical facilities selected should be arranged and utilized in an office atmosphere in accordance with current business

⁹¹Ibid., p. 127.

usage. Subject matter tended to be influenced by courses of study, suggestions by other teachers, suggestions by businessmen, or textbooks. Topics centered around three areas: technical skills, technical knowledges, and nontechnical knowledges.

CHAPTER III

BASIC CONSIDERATIONS

In order to set forth a course of study, many basic factors had to be considered. Consideration had to be given to the general conditions under which instruction would be given. Some of the items included size of school, character of the school, interests and present-day needs of the community, qualifications and size of the teaching staff, and available teaching materials and physical facilities. These factors had to be evaluated and the course content adapted to meet these requirements and limitations.

General Conditions

1. School size. Bonneville High is classified as a large high school in the state of Utah with an enrollment of approximately 1,300 students in grades 10-12. The business department operates as a part of the regular high school organization with an enrollment of approximately 750 students.

2. Purpose of the school. The primary purpose of education at Bonneville High School is to "teach as completely and comprehensively as possible mastery of the basic subject areas of language, mathematics, science, and social studies."⁹² In addition to its primary purpose, "well planned programs in vocational areas should be offered."⁹³

⁹²"Statement of Philosophy," Bonneville High School Teacher's Handbook (Ogden, Utah: Bonneville High School, 1965), p. 1. (Nimeographed.)

⁹³Ibid.

3. Qualifications and size of the business teaching staff. The staff consists of four full-time teachers. All teachers have business majors and have specialized in the specific subject areas that they teach.

4. Community needs. Opportunities for stenographic employment in the community exist primarily in the areas of Federal employment and positions requiring stenographic as well as general office work. Many employment opportunities exist since the school helps to serve a community of 150,000 in the greater Ogden area.

5. Text materials. All student text materials given in Chapter IV, with the exception of the shorthand text and reference manual, have been purchased on a departmental basis through a student fee because of the student expense involved in purchasing a variety of necessary instructional materials.

6. Workability of course of study. The course of study was utilized during the 1965-66 school year. Revisions and improvements applicable to the particular needs of students were made in order to make a workable course of study. Recommendations were developed for further curriculum developments that could improve the quality of training received.

7. Follow-up study. The vocational program developed in the state of Utah requires that a follow-up study of graduates enrolled in a program such as Secretarial Studies be conducted each year by the vocational counselor in the high school.

Physical Facilities

Factors that must be taken into consideration in order to make the most of school facilities and meet the requirements of the course:

1. The largest room in the business department was selected for this course. Room dimensions: 30 by 40 feet (1200 square feet).

2. The room must accommodate office practice training at two levels: stenographic and clerical. At present, it will also be necessary to utilize these facilities for teaching elementary shorthand.

3. There has always been, of course, a certain amount of administrative resistance against "special purpose" rooms that cannot be used for other classes. As a result, the layout selected was a "combination room" that could be utilized for the teaching of other business courses.

4. A traditional arrangement of desks was the only feasible room arrangement possible. In order to teach the shorthand unit adequately, it was necessary that student stations or desks face the front of the room where chalkboard facilities were available. Even though a traditional arrangement must be used, an office atmosphere prevails because of the furniture selected. Definite work centers have been established.

5. The laboratory was arranged to accommodate thirty student stations equipped with a typewriter at each station. Other business machines were placed on individual machine tables or in the counter storage area.

6. Furniture and equipment that could be utilized in the course:

- 30 L-shaped desks for typewriters
- 14 Individual tables for calculating machines
- 1 Large work table for duplicating
- 48 Standard chairs
- 2 Correspondence-size file cabinets
- 7 Standard electric typewriters
- 2 Selectric typewriters
- 1 Long-carriage electric typewriter
- 20 Manual typewriters
- 10 Electric ten-key adding machines
- 2 Printing calculators
- 2 Manual rotary calculators
- 6 Key-driven calculators

- 2 Posting-bookkeeping machines
- 1 Dictating-transcribing machine
- 1 Transcribing machine
- 2 Illuminated drawing boards

7. Built-in facilities available: closet, counter cabinets 20 feet long for storage of supplies and equipment, washing facilities, wall electrical outlets along two sides of the room operated by a master power switch, 60 running feet of bulletin board facilities, and 25 running feet of chalkboard facilities.

8. Machine tape, typewriter ribbons, and small office supplies were furnished by the central district office of the Weber Board of Education. All other supplies were obtained through student fees from local office supply dealers.

CHAPTER IV

COURSE OF STUDY IN SECRETARIAL STUDIES

Introduction

This course of study was prepared to aid in the teaching of a block-time class entitled Secretarial Studies at Bonneville High School.

It was assumed that (1) the course would be offered in the twelfth grade, (2) the applicants would have had at least one semester of typewriting and one year of shorthand, and (3) each applicant would be able to type at least forty words a minute for five minutes and take dictation at a minimum of sixty words a minute for three minutes on new material.

Five Major Units

The course of study was divided into five major units or subject areas as follows:

1. Advanced Shorthand
2. Transcription
3. Advanced Typewriting
4. Office Procedures
5. Business Machines

The time needed to present each unit is included in Chapter V of this report in a suggested timetable of activities.

Informational Outline

The informational outline method of preparing and organizing this course of study was used because it furnished a quick reference to the

significant points to be covered in each unit. This method was felt to be more flexible than the rigid daily lesson plan style. Since flexibility was one of the key factors desired in the planning of this course, it was felt that this type of organization could be up-dated very easily and adapted to changing media.

Text and Supplementary Materials

In each main unit a group of books and supplementary materials was listed which were used as texts to formulate that particular unit of work. Adopted textbooks and available resource materials were used for student references. Supplementary teaching materials were also listed.

The text references at the beginning of each unit were selected after careful consideration and study.

Advanced Shorthand

Introduction

Since the second-year shorthand unit was specifically geared for stenographic competence, it was imperative that the time be spent in activities that would bring the best results possible. The shorthand instruction was concentrated upon the skills, knowledges, and rate of speed needed to secure an initial stenographic position. A major part of the learning time is devoted to writing activities. Shorthand theory should also receive attention throughout the unit. The more complete the understanding of theory, the greater facility the students will have in taking dictation, in improvising shorthand outlines, and in transcribing shorthand notes.

Unit References

General Unit References. The following books and articles were used in the preparation of this unit:

Condon, Arnold. "Principles for the Development of Theory and the Building of Writing Skills in First-Year Shorthand," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education, Somerville, New Jersey: Somerset Press, 1962.

Douglas, Lloyd V., James T. Blanford, and Ruth I. Anderson. Teaching Business Subjects. Second edition. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1965.

Dry, Samuel W., and Nellie E. Dry. Teaching Gregg Shorthand and Transcription. Portland, Maine: J. Weston Walch, Publisher, 1962.

Grubbs, Robert L. "Rx for Effective Shorthand Teaching," Business Education World. New York: McGraw-Hill Book Company, 1960-61. (Reprinted).

Lamb, Marion M. Your First Year of Teaching Shorthand and Transcription. Second edition. Cincinnati: South-Western Publishing Company, 1961.

Miller, Ernest E., Lenore G. Pierce, and Rowena Wellman. "Developing Marketable Skill in Second-Year Shorthand," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Rowe, John L. "The Four Arts of Shorthand Teaching: The Art of Dictating," Business Education World, 40:15-16, October, 1959.

Rowe, John L. "The Four Arts of Shorthand Teaching: The Art of Previewing," Business Education World, 40:25-28, December, 1959.

Text Used by Students. Adopted student text for this unit was:

Gregg, John R., Louis A. Leslie, and Charles E. Zoubek. Gregg Speed Building. Diamond Jubilee Series. New York: McGraw-Hill Book Company, 1964.

Texts Used by Teacher. The following supplementary texts were selected to aid in the teaching of this unit:

Gregg, John R., Louis A. Leslie, and Charles E. Zoubek. Instructor's Handbook for Gregg Speed Building. Diamond Jubilee Series. New York: McGraw-Hill Book Company, 1964.

Porter, Leonard J. "Prentice-Hall Shorthand Dictation Pamphlet Series." Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1961-63.

Steps to Success in Shorthand, Book 1 and 2. New York: Pitman Publishing Corporation, 1947.

Stromy, Madeline S., M. Claudia Garvey, and Howard L. Newhouse. Refresher Course in Gregg Shorthand Simplified. New York: McGraw-Hill Book Company, 1962.

Zoubek, Charles E. Previewed Dictation. New York: McGraw-Hill Book Company, 1950.

Zoubek, Charles E. Progressive Dictation with Previews. New York: McGraw-Hill Book Company, 1956.

Zoubek, Charles E. Speed Dictation with Previews in Gregg Shorthand. Diamond Jubilee Series. New York: McGraw-Hill Book Company, 1963.

Unit Objective

Shorthand instruction in this unit has been designed to develop in the pupil the ability to take dictation encountered in a business situation with sufficient speed to insure getting it down and with sufficient accuracy to produce a usable transcript. In order to obtain this broad objective, instruction must be given that will: (1) automatize common words and phrases; (2) build a business vocabulary; (3) aid the student in the formation of well-constructed and proportioned outlines; (4) further develop fluency and proficiency in writing and in reading shorthand through systematic review of theory; (5) develop the ability to record new-matter dictation requiring recall of outlines and the construction of new words; (6) build speed in taking dictation; (7) build sustained dictation skill on longer takes; (8) develop ability to take office-style dictation; and (9) develop desirable stenographic traits and habits.

Unit Outline for Advanced Shorthand

I. PRETESTING OF STUDENTS' KNOWLEDGE OF SHORTHAND

- A. Measuring of the students' current dictation rates
 - 1. Sampling to determine the range of speed in taking dictation
 - 2. Dictating previewed matter for three minutes
- B. Measuring of the students' knowledge of shorthand theory
 - 1. Dictated simple theory test covering all major basic principles of shorthand and excluding memory forms
 - 2. Dictated brief form test

II. ORGANIZATION OF MATERIALS FOR SHORTHAND

- A. Dictation tools
 - 1. Pen
 - a. Notes must be written in ink rather than pencil
 - b. A medium-fine point recommended
 - 2. Notebook
 - a. Use of two notebooks--one for class dictation and one for homework
 - b. Varying the column widths in the shorthand notebook by using two-, three-, and four-column notebooks
- B. Taking dictation
 - 1. Using your notebook
 - a. Use only one side of the notebook at a time
 - b. If possible, the notebook should lie flat when student is taking dictation
 - c. Keep an elastic around the used portion of the notebook
 - d. Turn the page quickly
 - 2. Good work habits
 - a. Keep the station neat
 - b. Keep the textbook open to the current lesson
 - c. Have dictation tools ready
 - d. Do not borrow supplies or tools from others
 - 3. Tips on gaining shorthand speed
 - a. The correct outline for brief forms must be automatic
 - b. Homework writing practice a must in developing shorthand writing skill
 - c. Endurance built by repetitively practicing many short takes at high speed
 - d. Keep writing no matter how fast the dictation
 - e. Supplement class dictation with practice at home
 - (1) Use of television or the radio
 - (2) Use of records available in the school library
 - (3) Use of the "self-dictation" method⁹⁴
 - (4) Use of shorthand for personal notes

⁹⁴ John R. Gregg, et. al., Gregg Speed Building (Diamond Jubilee Series; New York: McGraw-Hill Book Company, Inc., 1964), p. 11.

III. HOMEWORK

- A. Varied assignments from student text
 - 1. Basic student assignments to provide for flexibility and advancement in the shorthand assignment program
 - a. The student reads the lesson from printed plates, writes the lesson once and encircles in the shorthand notes difficult words and phrases, reads lesson from shorthand notes, practices difficult outlines encircled in the first writing; rewrites the entire lesson for fluency
 - b. The student writes entire assignment twice in shorthand, once from the text and once by copying from his own notes
 - c. The student writes entire shorthand assignment twice and transcribes one letter on the typewriter from his own notes
 - d. The student writes the entire assignment and transcribes two or three letters from his own notes
 - e. The student transcribes the entire lesson double spaced on the typewriter and then writes in shorthand the lesson above the typed copy
 - 2. Different types of repetitive practice that can be utilized to avoid monotony in the shorthand assignment program
 - a. The whole sentence method, the time copy method, the sentence repetitive method, and the line skip method⁹⁵
 - b. The "shadow" or "scribble" writing method and the "spot" practice method⁹⁶
- B. Varied assignments from dictation
 - 1. A sustained five-minute take used as homework
 - 2. Dictation from tapes or records used for homework

IV. EXTENDING THE SHORTHAND VOCABULARY AND WRITING PROFICIENCY

- A. Review of non-memory theory principles
 - 1. Systematic review procedure for word families
 - a. Statement of theory principle
 - b. Drill in writing familiar words involving the principle

⁹⁵Arnold Condon, "Principles for the Development of Theory and the Building of Writing Skills in First-year Shorthand," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education (Somerville, New Jersey: Somerset Press, 1962), pp. 145-147.

⁹⁶Marion M. Lamb, Your First Year of Teaching Shorthand and Transcription (second edition; Cincinnati: South-Western Publishing Company, 1961), p. 281, citing Hazel A. Flood, Brass Tacks of Skill Building in Shorthand (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1951), pp. 39-40.

- c. Drill in writing new words involving the principle
- d. Dictation of contextual matter packed with words pertaining to the principle
- 2. Systematic review procedure for word beginnings and endings
 - a. Statement of theory principle
 - b. Drill in writing familiar words involving the principle
 - c. Drill in writing new words involving the principle
 - d. Dictation of contextual matter packed with words pertaining to the principle
- B. Recall of brief forms and frequent phrases
 - 1. Automatization of common words and phrases
 - 2. Dictation of contextual matter packed with words pertaining to the principle
- C. Review of special forms
 - 1. Geographical expressions
 - 2. Frequent names
- D. Shorthand penmanship
 - 1. Accuracy practice drills on groups that require care in writing
 - 2. Proportion and outline construction drills
- E. Spelling and vocabulary development

V. READING

- A. The reading of shorthand notes rapidly and accurately
 - 1. Spot checking on reading ability
 - 2. Group or unison reading avoided
- B. Occasional reading from:
 - 1. Homework notes
 - 2. Familiar shorthand plates
 - 3. Unfamiliar shorthand plates
 - 4. Notes taken during speed forcing on new-matter dictation

VI. DICTATION

- A. Development of word-carrying ability
 - 1. Building word retention and idea retention during dictation using such methods as "spurt" dictation⁹⁷
 - 2. Timed writing of words, brief forms, and phrases
- B. Development of speed by speed forcing
 - 1. Building speed from assigned or familiar material
 - 2. Building skill with new matter previewed material
 - a. Selection of materials for evenly spaced, repetitive dictation practice

⁹⁷ Robert L. Grubbs, "RX for Effective Shorthand Teaching," Business Education World (New York: McGraw-Hill Book Company, 1960-61), p. 19. (Reprinted.)

- (1) Using short business letters from 80 to 160 words in length
- (2) Using five-minute speed takes
- b. Selection of speed-building pattern
 - (1) One-minute plan⁹⁸
 - (2) Grubbs's stair-step plan⁹⁹ or inverted pyramid plan¹⁰⁰
 - (3) Hazel Flood plan¹⁰¹
 - (4) The Blanchard pyramid plan¹⁰²
 - (5) Wallace Bowman plan¹⁰³
 - (6) Progressive plan and the reverse plan¹⁰⁴
- c. Procedure for speed building
 - (1) Dictation begins at a rate of speed attainable by the slowest student
 - (2) Dictation advances progressively in 10-word intervals
 - (3) The final dictation reduced to the control level of 10 words faster than the slowest speed dictated
- C. Development of skill in taking dictation
 1. Using a progressive speed builder or dictation consisting of 5 one-minute letters and each letter counted at a slightly higher speed
 2. Using progressive dictation or continuous dictation that gradually increases throughout the letter to higher and higher rates
- D. Development of sustained writing power
 1. Dictation of three- and five-minute takes at 20 words a minute slower than speed building practiced material
 - a. For in-class practice
 - (1) Students read notes, silently or orally, and encouraged to ask about correct outlines for difficult and unfamiliar words

⁹⁸John R. Gregg, Louis A. Leslie, and Charles E. Zoubek, Instructor's Handbook for Gregg Speed Building (Diamond Jubilee Series; New York: McGraw-Hill Book Company, 1964), pp. 15-17.

⁹⁹Grubbs, op. cit., p. 17.

¹⁰⁰Utah State Department of Public Instruction, op. cit., pp. 39-40.

¹⁰¹Lamb, op. cit., pp. 88-89.

¹⁰²Clyde Blanchard and Charles E. Zoubek, Teachers' Handbook for Expert Shorthand Speed Course, Simplified (New York: McGraw-Hill Book Company, 1951), pp. 10-15.

¹⁰³Wallace B. Bowman, Shorthand Dictation Studies Manual (second edition; Cincinnati: South-Western Publishing Company, 1947), pp. 24-26.

¹⁰⁴Utah State Department of Public Instruction, op. cit.

- (2) Repetition at same dictation rate for improvement of accuracy and penmanship progress
- b. For official measurement and recording of progress
 - (1) Grading in terms of per cent of accuracy of the transcript with any deviation from verbatim dictation counted as an error
 - (2) Transcribing of sustained dictation on the typewriter in straight-copy form
- 2. Interesting current articles used as dictation material for building sustained-writing power
- 3. Practice in taking long business reports at an average speed for the class
- 4. Dictation at a moderate rate for an entire period
- E. Development of skill in taking untimed and uneven dictation
 - 1. Untimed dictation spoken with speed spurts and pauses
 - 2. Office-style dictation
 - a. Reading back portions of letter
 - b. Deleting parts from letter
 - c. Making insertions
 - 3. Dictation at the typewriter
 - 4. Dictation over the telephone.

Transcription

Introduction

Since transcription has been called a many-faceted skill involving the ability to take dictation at a fair rate of speed, read it back, and type it in mailable form, the transcription unit was constructed to be integrated with the advanced shorthand and typewriting units.

In interrelating the elements of transcription into a smooth coordinated activity, transcription skill must be built following a definite plan. Materials dictated must be arranged according to a planned program. English skills must be presented with a follow-up in the material transcribed that day or the next. The students will be expected to apply correctly principles of typing usage and English usage that have been reviewed in the transcription and advanced typewriting units.

Unit References

General Unit References. The following books and articles were used in the preparation of this unit:

Allen, Roscoe J. "Advanced Shorthand Transcription," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Dry, Samuel W., and Nellie E. Dry. Teaching Gregg Shorthand and Transcription. Portland, Maine: J. Weston Walch, Publisher, 1962.

Grubbs, Robert L. "RX for Effective Shorthand Teaching," Business Education World. New York: McGraw-Hill Book Company, 1960-61. (Reprinted.)

Tonne, Herbert A., Estelle L. Popham, and M. Herbert Freeman. Methods of Teaching Business Subjects. Third edition. New York: McGraw-Hill Book Company, 1965.

Wagoner, George A., Elise Davis, and Ruth I. Anderson. "How to Teach Transcription," Business Education World. New York: McGraw-Hill Book Company, 1956. (Reprinted.)

Text Used by Students. Adopted student text for this unit was:

Gavin, Ruth E., and E. Lillian Hutchinson. Reference Manual for Stenographers and Typists. Third edition. New York: McGraw-Hill Book Company, 1961.

Texts Used by Teacher. The following supplementary tests were selected to aid in the teaching of this unit:

Leslie, Louis A., and Charles E. Zoubek. Dictation for Transcription. Diamond Jubilee Series. New York: McGraw-Hill Book Company, 1963.

Leslie, Louis A., and Charles E. Zoubek. Transcription Dictation. New York: McGraw-Hill Book Company, 1956.

Unit Objective

The prime objective of the transcription unit was the development of the ability to transcribe office dictation in mailable form at a reasonable rate of speed. In order to attain this objective the

student must be able to: (1) take office-type dictation; (2) read notes efficiently; (3) transcribe accurately and speedily; (4) follow directions; (5) proofread and evaluate work; (6) make neat erasures and corrections; (7) spell; (8) punctuate, capitalize, type figures in correct form, and construct sentences; (9) arrange transcribed materials attractively on the page; and (10) work under pressure.

Unit Outline for Transcription

I. BASIC TRANSCRIPTION TECHNIQUES

- A. Organization of materials
 1. Notebook techniques
 - a. Notebook position
 - b. Dating the pages of the notebook in the left-hand corner
 - c. Numbering each letter dictated
 - d. Leaving a few blank lines at the beginning of each letter for special instructions or information about the letter
 - e. Drawing a diagonal line through your notes immediately after transcribing each letter
 2. Manipulation of materials
 - a. Having desk well-organized and the proper tools ready
 - b. Placing transcribed letters face downward on your desk
 3. Care of equipment
 - a. Erasing errors with the carriage to the extreme right or left
 - b. Cleaning the type
 - c. Changing the ribbon on a typewriter
 4. Use of dictionary and reference manual
- B. Writing transcribable dictation
 1. Inserting correct punctuation in notes
 2. Substituting the appropriate word for a shorthand outline which cannot be read
 3. Understanding the content of dictation and transcribing for meaning
 4. Constructing unfamiliar outlines
- C. Typing from shorthand notes instead of printed materials
 1. Keeping eyes focused on the notebook
 2. Transcribing in thought units beginning with words and then proceeding to phrases and sentences

II. DEVELOPING TRANSCRIPTION TECHNIQUES

- A. The introduction of typed transcripts using straight-copy form
 - 1. Transcription of plate material that has been assigned previously for homework reading and writing practice
 - 2. Transcription of unfamiliar plate material
 - 3. Transcription of self-written notes on practiced dictation materials
 - 4. Transcription of self-written notes from related materials
 - 5. Transcription of self-written notes taken from homework practice
- B. Applying rules of English composition
 - 1. Punctuation pointers
 - a. The use of the period
 - b. The use of the question mark
 - c. Comma rules
 - (1) Comma parenthetical
 - (2) Comma apposition
 - (3) Comma series
 - (4) Comma if clause
 - (5) Comma conjunction
 - (6) Comma introductory
 - (7) Comma when clause
 - (8) Comma as clause
 - (9) Comma nonrestrictive
 - (10) Comma and omitted
 - d. Use of the semicolon
 - (1) Semicolon and omitted
 - (2) Semicolon no conjunction
 - (3) Semicolon because of comma
 - e. Use of the colon, dash, apostrophe, and hyphen
 - 2. Word division
 - 3. Abbreviations
 - 4. Word usage
 - a. Subject and verb agreement
 - b. Frequently confused words
 - 5. How to write numbers
 - 6. When to capitalize
- C. Spelling
 - 1. Assigning words from a list of frequently misspelled or "spelling demon" words
 - 2. Making and going over list of words missed the day before in class assignments
 - 3. Having student keep an individual list of words that are difficult
- D. Specialized transcription drills
 - 1. Drills to develop the pattern of the expert in transcribing
 - a. Comparison of typing and the transcribing rate
 - (1) One five-minute timed writing from straight copy material
 - (2) Letter copy

- b. Developing the ability to produce corrected straight-copy transcripts at high rates of speed from sustained new-matter dictation to obtain timed straight-copy production rate
- c. Transcribing in thought units with materials marked in thought units and students instructed to read and transcribe in thought units, keeping the carriage moving at all times
- 2. Drills to increase transcription speed from shorthand copy
 - a. Transcription of the same letter from shorthand notes two or three times in order to increase the student's transcription rate
 - b. Drill on typing from shorthand words and phrases written on the board that appear in the material to be transcribed
 - c. Transcription power drive¹⁰⁵
 - d. Call-the throw drill¹⁰⁶
 - e. Variable-line writing¹⁰⁷
 - f. "Scribble-typing" drill¹⁰⁸
- 3. Proofreading drills
 - a. Finding typographical errors
 - b. Finding dictator's errors
 - (1) Finding obvious errors in grammar
 - (2) Finding inconsistencies in names and dates
 - (3) Finding computational errors
- 4. Flow-of-word drills
 - a. Carbon paper drills
 - b. Letter production drills

III. DETAILS THAT MARK THE ACCEPTABLE LETTER

- A. Stationery
- B. Parts of a letter
- C. Punctuation styles
 - 1. Open punctuation
 - 2. Mixed punctuation
 - 3. Closed punctuation
- D. Letter placement guide
 - 1. Judging the length of letters from shorthand notes for correct placement
 - 2. Adjusting the placement of a letter on a page when it appears to be longer or shorter than originally estimated

¹⁰⁵Douglas, *et. al.*, *op. cit.*, pp. 243-244.

¹⁰⁶Tonne, *et. al.*, *op. cit.*, p. 230.

¹⁰⁷Grubbs, *op. cit.*, p. 31

¹⁰⁸*Ibid.*

- E. Letter styles--stressing blocked and semiblocked letter styles
- F. "Mailability"

IV. SUSTAINED TRANSCRIPTION OF ARRANGED MATERIAL

- A. Transcription of new-material dictation consisting of short business letters
- B. Transcription of new-material dictation consisting of medium length business letters
- C. Transcription problems gradually increasing in complexity and correlated with typewriting production for review purposes
 - 1. Special notations in letters
 - a. Enclosures
 - b. Attention lines
 - c. Subject lines
 - d. Special mailing instructions
 - 2. Multiple carbons and carbon-copy notations
 - 3. Postscripts on letters
 - 4. Very short business letters
 - 5. Two-page letters
 - 6. Tabulations within letters
 - 7. Internal communications
 - 8. Telegrams
 - 9. Minutes to meetings
 - 10. Short business reports

V. TRANSCRIBING OFFICE-STYLE DICTATION

- A. Dictation at an uneven rate of speed
- B. Recording dictator's corrections
- C. Practice in taking dictation under unusual circumstances
- D. Business units¹⁰⁹

Advanced Typewriting

Introduction

This unit was designed to act as a means of forming a common employable level in production typing and of paving the way for the production of mailable transcripts. Although the course content has been fairly well standardized, the teacher should have a basic outline

¹⁰⁹Roscoe J. Allen, op. cit., p. 202.

to draw from in the construction of weekly lesson plans. The amount of time and material covered in the unit will depend upon the background of the students.

Unit References

General Unit References. The following books and articles were used in the preparation of this unit:

Allen, Roscoe J. "Advanced Shorthand Transcription," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Douglas, Lloyd V., and James T. Blanford, and Ruth I. Anderson. Teaching Business Subjects. Second edition. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1965.

Rowe, John L. "How to Meet Changing Needs in Typewriting," Business Education World. New York: McGraw-Hill Book Company, 1964.

Woodward, Theodore, and Eugenia Moseley. "Basic Typewriting," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Texts Used by Students. Adopted student texts for this unit were:

Humphrey, Katherine, Allie Dale Lambert, and Howard L. Newhouse. Timed Writings for Typing and Transcribing. Diamond Jubilee Series. New York: McGraw-Hill Book Company, 1965.

Liguori, Frank E. Basic Typewriting Operations: Principles and Problems. Cincinnati: South-Western Publishing Company, 1965.

Lloyd, Alan C., John L. Rowe, and Fred E. Winger. Typing Skill Drives. New York: McGraw-Hill Book Company, 1960.

Unit Objective

The advanced typewriting unit was designed to reconstruct basic typewriting and production skills and to present an opportunity for developing the skills and knowledges that were necessary in transcription.

In order to obtain this objective, instruction must be given that will: (1) reconstruct and review basic skills; (2) polish skills previously learned and integrate those skills to actual job situations; (3) help students reach an employable level in typewriting office forms and communications; (4) integrate related typewriting and transcription skills; (5) maintain typewriting skills in both sustained speed and accuracy; (6) develop the ability to work under pressure at varied office jobs; (7) encourage the exercising of initiative and resourcefulness in meeting new situations; (8) develop a critical attitude toward one's own work; and (9) compose efficiently at the typewriter.

Unit Outline for Advanced Typewriting

I. TYPEWRITING SKILL DEVELOPMENT

- A. Reconstruction of basic skill
 1. Technique study
 - a. Position at the typewriter
 - b. Proper location of fingers on the keyboard
 - c. Right positioning of machine, textbook, and supplies
 - d. Stroking techniques
 2. Manipulation of machine parts
 - a. Review of machine operations
 - (1) Paper guide and paper release
 - (2) Margins and tabular system
 - b. Drills for operation of machine parts
 - (1) Space-bar drill
 - (2) Carriage-throw drill
 - (3) Shift-key drill
 - (4) Margin-release drill
 - (5) Tab-key drill
 - (6) Backspace drill
 - (7) Shift-lock and release drill
 3. Special techniques
 - a. Special keys and characters not found on the typewriter
 - b. Backspacing and centering
 - c. Underscoring
 - d. Tabulating

- B. Basic skill drills
 - 1. Keyboard review drills
 - a. Alphabetic practice
 - (1) Home-position drills
 - (2) Key bank drills
 - (3) Specific finger drills
 - (4) Alphabetic words, sentences, and paragraph drills
 - b. Number and symbol control practice
 - (1) Specific finger drills
 - (2) "We 23" drills
 - (3) Century drives
 - (4) Calling-the-throw number drills
 - (5) Statistical sentence and paragraph drills
 - (6) Symbol drills
 - 2. Rhythm drills
 - a. Balanced-hand drills
 - b. One-hand drills
 - c. Alternate-hand word drills
 - d. Capitalization drills
 - 3. Speed development drills
 - a. Acceleration sentences
 - b. Phrase-development drills
 - c. Stroke-sharpening drills
 - d. Word-family fluency drills
 - e. Downhill sentence drills
 - f. Speed-sprint sentence drills
 - 4. Accuracy development drills
 - a. Anchor drills
 - b. Wrist-motion control drills
 - c. Concentration drills
 - d. One-hand word and sentence drills
 - e. Double-letter word drills
 - 5. Production drills
 - a. Letter styles
 - b. Parts of business letters
 - (1) Addresses and salutations
 - (2) Closing lines and reference initials
 - c. Tabulating techniques
 - d. Script and rough drafts
 - (1) Script copy
 - (2) Script sentences and paragraphs
 - (3) Corrected script copy
 - (4) Rough-draft sentences and paragraphs

II. PRODUCTION TECHNIQUES

- A. Correspondence
 - 1. Business letters
 - a. Summary of principles for business letters
 - (1) Importance of letters in business
 - (2) Reference materials needed for typing

- (3) Rules which govern the setting up of a business letter
- (4) Parts of a business letter
- (5) Punctuation styles
- (6) How to "picture frame" letters
- b. Production problems
 - (1) Commonly-used letter forms and placement
 - (a) Full block
 - (b) Block
 - (c) Semiblock
 - (d) Other style variations
 - (2) Special notations
 - (a) Attention line
 - (b) Subject line
 - (c) Enclosure notation
 - (d) Carbon copy notation
 - (e) Postscripts
 - (f) Airmail notation
 - (g) Special delivery notation
 - (3) Two-page letter
 - (4) Carbon copies
 - (5) Special notations within the body of a letter
 - (a) Enumerations
 - (b) Tabulation
 - (6) Use of off-size stationery
2. Federal government correspondence
3. Postal cards
4. Interoffice memorandums
 - a. Printed forms
 - b. Typewritten forms
5. Telegrams
- B. Centering and justifying of the right margin
 1. Summary of centering principles
 - a. Vertical centering
 - b. Horizontal centering
 2. Centering problems
 - a. Headings and lines
 - b. Paragraphs
 - c. Off-size paper
 - d. Justifying the right margin
- C. Statistical information
 1. Tabulation
 - a. Summary of tabulation principles
 - (1) Backspace method
 - (2) Mathematical method
 - (3) Judgmental placement
 - b. Guides to preparing tables
 - c. Tabulation problems
 - (1) Tables
 - (a) Open tables
 - (b) Ruled tables
 - (c) Boxed tables
 - (d) Unarranged tables

- (2) Financial statements
 - (a) Income statement
 - (b) Balance sheet
- 2. Graphic presentation
 - a. Guides to preparing graphs
 - b. Graphic problems
 - (1) Line graph
 - (2) Horizontal bar graph
 - (3) Vertical bar graph
 - (4) Pie graph
- D. Business Documents
 - 1. Manuscript and report typing
 - a. Summary of principles for manuscript and report typing
 - (1) Importance of uniformity
 - (2) Structural parts of formal reports
 - (a) Organizing reports
 - (b) Sources of information--primary and secondary
 - (3) General rules for manuscript typing
 - (a) Margins and spacing
 - (b) Heading arrangements
 - (c) Pagination
 - b. Arranging and typing report problems
 - (1) Outline
 - (2) Rough draft
 - (3) Title page
 - (4) Table of contents
 - (5) List of tables, charts, or illustrations
 - (6) Text of the report
 - (a) Quotations
 - (b) Footnotes vs. cross referencing or name and number system
 - (7) Appendix items
 - (a) Tables--summary and comparison
 - (b) Exhibits
 - (8) Bibliography
 - (a) Name-and-year system
 - (b) Number system
 - 2. Publicity releases
 - 3. Speeches
 - 4. Minutes of meetings
 - a. Content
 - b. Suggestions for preparing the minutes
- E. Business forms
 - 1. Characteristics of forms
 - 2. Cautions in typing forms
 - 3. Problems in typing office forms
 - a. Printed forms
 - (1) Purchase order
 - (2) Purchase requisition
 - (3) Invoice
 - (4) Credit memorandum
 - (5) Statement of account
 - b. Typewritten office forms

4. Problems in typing legal papers
 - a. Printed legal forms
 - (1) Leases
 - (2) Affidavits
 - (3) Bills of sale
 - (4) Deeds
 - (5) Mortgages
 - (6) Powers of attorney
 - b. Typewritten legal forms
- F. Duplicating processes
 1. The fluid hectograph process
 - a. A master "set" consists of a sheet of specially coated white paper and a special carbon-coated sheet
 - b. Typing the master
 - c. Correcting a master
 2. The stencil process
 - a. A stencil consists of two basic parts: a stencil sheet and a backing sheet
 - b. Prestenciling activities
 - (1) Clean typewriter keys
 - (2) Set the ribbon indicator on "stencil"
 - (3) Check touch control
 - c. Typing the stencil
 - d. Correcting a mistake

Office Procedures

Introduction

A course in stenographic training should not be limited to instruction in activities closely or nearly related to transcription, since the competent stenographer or secretary will be required to handle other office duties. For example, she needs to be competent in dealing with people over the telephone or in filing office correspondence.

The office procedures unit was designed to familiarize the student with methods by which office skills and knowledges may be applied, integrate previously acquired knowledges and skills, and utilize office skills and knowledges in practical office situations.

Unit References

General Unit References. The following books and articles were used in the preparation of this unit:

Archer, Fred C. "How to Select the Course Content for Clerical Practice," National Business Education Quarterly, 28:27-32, December, 1959.

Archer, Fred C. "Organizing the Office Practice Course." New York: Gregg Publishing Division, McGraw-Hill Book Company, 1962. (Special Service Brochure.)

Boggs, Lohmie. "Basic Considerations for Secretarial Office Practice," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Collins, Marisa Josephine. Handbook for Office Practice Teachers. Monograph 91. Cincinnati: South-Western Publishing Company, 1954.

Douglas, Lloyd V., James T. Blanford, and Ruth I. Anderson. Teaching Business Subjects. Second edition. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1965.

Frisbie, M. Adele. "Objectives for and the Selection of Subject Matter for Secretarial Office Practice," Secretarial Education with a Future, Nineteenth Yearbook of the American Business Education. Somerville, New Jersey: Somerset Press, 1962.

Harms, Harm, and E. W. Stehr. Methods in Vocational Business Education. Second edition. Cincinnati: South-Western Publishing Company, 1963.

Texts Used by Students. Adopted student texts for this unit were:

Filing Practice Workbook. Second edition. New York: Pitman Publishing Corporation, 1958.

Gregg, John Robert, et. al. Applied Secretarial Practice. Fifth edition. New York: McGraw-Hill Book Company, 1962.

Texts Used by Teacher. The following supplementary texts were selected to aid in the teaching of this unit:

Archer, Fred C., Raymond F. Brecker, and John C. Frakes. General Office Practice. Second edition. New York: McGraw-Hill Book Company, 1963.

Aurner, Robert R., and Paul S. Burtness. Effective English for Business. Fifth edition. Cincinnati: South-Western Publishing Company, 1962.

Beamer, Esther Kihn, J. Marshall Hanna, and Estelle L. Popham. Effective Secretarial Practice. Fourth edition. Cincinnati: South-Western Publishing Company, 1962.

Editorial Staff. The Handbook of Advanced Secretarial Techniques. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1962.

Lawrence, Nelda R. Secretary's Business Review. Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1959.

Place, Irene, and Charles B. Hicks. College Secretarial Procedures. Third edition. New York: McGraw-Hill Book Company, 1964.

Reigner, Charles G. College Business Correspondence. Second edition. Baltimore: The H. M. Rowe Company, 1964.

Robichaud, Beryl. Understanding Modern Business Data Processing. New York: McGraw-Hill Book Company, 1966.

Russon, Allien R. Business Behavior. Third edition. Cincinnati: South-Western Publishing Company, 1964.

Wanous, S. J., and Edward E. Wanous. Automation Office Practice. Cincinnati: South-Western Publishing Company, 1964.

Unit Objectives

In order to bridge the gap between the class and the office, the office procedures unit was developed. The desired objective was to develop the ability to handle efficiently the responsibilities and duties that a stenographic position requires. Persons who aspire to stenographic positions should acquire: (1) desirable work habits, attitudes, and personal characteristics; (2) knowledge of work simplification and office organization, supervision, and management; (3) knowledge of banking facilities, financial and legal activities,

principles of data processing, techniques in handling callers, procedures in handling mail, and applying for a job; (4) and skill in filing, composing routine letters, use of the dictionary and other reference books, use of telephone services, use of telegraph services, and use of transportation services.

Unit Outline for Office Procedures

I. FITTING YOURSELF INTO BUSINESS (Human Relations)

A. Qualifications and duties of a stenographer

1. Skills

a. Basic job skills

- (1) English and communication
- (2) Spelling
- (3) Figuring
- (4) Handwriting

b. Specific job skills

- (1) Typewriting
- (2) Shorthand
- (3) Bookkeeping
- (4) Filing
- (5) Office machine operation

2. Duties performed by the stenographer

- a. Typing business papers
- b. Taking dictation and transcribing
- c. Handling the mail
- d. Making and answering telephone calls
- e. Using telegraph services
- f. Composing letters
- g. Meeting office callers
- h. Filing
- i. Using business machines
- j. Duplicating or multiple copy work
- k. Keeping records
- l. Planning the day's work
- m. Miscellaneous duties
 - (1) Performing personal services for employer
 - (2) Finding data in reference books
 - (3) Making appointments for employer
 - (4) Making graphs
 - (5) Keeping personnel and/or statistical records
 - (6) Handling travel arrangements
 - (7) Using shipping services

B. The personality of the stenographer

1. Personality

- a. Initiative
- b. Courtesy (manners)

- c. Enthusiasm
- d. Sincerity
- e. Voice and speech
- f. Co-operativeness
- g. Tact
- h. Social attitude
 - (1) Friendliness
 - (2) Evenness of disposition
 - (3) Breadth of interests
 - (4) A genuine liking for others
- 2. Responsibility
 - a. Promptness
 - b. Trustworthiness
 - c. Loyalty
 - d. Ambition
 - e. Persistence
 - f. Dependability
- 3. Attitude toward the job and others
 - a. Promptness and regularity in attendance
 - b. Pride in one's work
 - c. Production of a day's work
 - d. Consideration of others
 - e. Job relationships
 - (1) Employee--Employee
 - (2) Employer--Employee
- G. Personal appearance
 - 1. Cleanliness
 - 2. Neatness, health, and posture
 - 3. Make-up
 - 4. Hair grooming
 - 5. Selection of clothing
 - a. Appropriate dress
 - (1) Color
 - (2) Fabric
 - (3) Style
 - b. Attractive accessories
 - (1) Sensible shoes
 - (2) Jewelry

II. OFFICE EQUIPMENT AND SUPPLIES

- A. Secretarial furniture and equipment
 - 1. The secretary's desk
 - 2. The secretary's chair
 - 3. The typewriter
 - a. Various parts and features of a typewriter
 - (1) Size of type
 - (2) Special keyboards
 - b. Care of the typewriter
 - c. Special typewriters
 - (1) Vari-typer
 - (2) Justewriter
 - (3) Flexewriter and Synchro-tape typewriter

- B. Office stationery and supplies
 - 1. Paper for business use
 - a. Kinds of paper
 - b. Grade of paper
 - c. Weight or substance of paper
 - d. The right and wrong side of paper
 - e. Finish of the paper
 - f. The use of color for variety
 - 2. Typewriter ribbons
 - a. Fiber ribbons
 - b. Carbon-paper ribbons
 - 3. Miscellaneous office supplies
- C. Managing your work area
 - 1. Good housekeeping
 - 2. Planning the day's work
 - 3. Handling supplies
 - a. Arranging the desk drawers
 - b. Ordering office supplies

III. RECORDS CONTROL (filing)

- A. Filing systems
 - 1. Need for different files
 - a. Business correspondence files
 - b. Personal correspondence files
 - c. File of frequently called telephone numbers
 - d. Visible card files
 - 2. Different systems of filing
 - a. Alphabetic files
 - b. Geographic files
 - c. Subject files
 - d. Numeric files
 - e. Chronological files
 - f. Soundex files
- B. Principles of alphabetic indexing
 - 1. Basic terms to learn
 - a. Alphabetizing
 - b. Unit
 - c. Indexing
 - d. Coding
 - e. Surname, given name, and middle name
 - 2. Indexing rules
 - a. Names of individuals
 - b. Business names
 - c. Government names and political subdivisions
 - d. Special rules
 - (1) Banks and trusts
 - (2) Compound geographic names
 - (3) Titles and degrees
 - (4) Married women
 - (5) Addresses
 - e. Cross referencing

- C. Filing procedures and materials
 - 1. Preliminary steps in the filing procedure
 - a. Inspecting correspondence
 - b. Reading and indexing
 - c. Coding
 - d. Cross-referencing
 - e. Sorting
 - f. Filing
 - 2. Rules for correspondence filing
- D. Filing equipment and supplies
 - 1. Guides
 - a. Primary guides
 - b. Auxiliary or secondary guides
 - 2. Folders
 - a. Miscellaneous folders
 - b. Individual folders
 - c. Positions of folders and styles of tabbing
 - d. Preparation of folder labels and the use of colored labels
 - 3. Filing cabinets
 - a. Standard vertical files
 - b. Open-shelf files
 - c. Visible files
 - d. Counter files
- E. Other filing systems
 - 1. Numeric filing
 - a. Organization of a numeric file
 - b. Advantages and disadvantages of numeric filing
 - c. Procedure for filing numerically
 - 2. Geographic filing
 - a. Arrangement of a geographic file
 - b. Procedure for filing
 - c. Advantages and disadvantages of filing geographically
 - 3. Subject filing
 - a. Arrangement of a subject file
 - b. Procedure for filing
 - c. Advantages and disadvantages of subject filing
 - 4. Soundex filing
 - a. Soundex code numbers
 - b. Soundex coding
- F. Charging
 - 1. The need for control
 - 2. Charging out records
 - a. Out guides
 - b. Substitution cards
 - c. Out folders
 - 3. Following up borrowed records
- G. Transfer methods
 - 1. Need for transferring of records
 - 2. Plans of transfer
 - a. Periodic transfer
 - b. Perpetual transfer

3. Storage
4. Microfilming of records

IV. FINANCIAL DUTIES

- A. A review of business mathematics
 1. Review of fundamentals
 - a. Fractions
 - b. Decimals
 - c. Figuring percentages
 - d. Figuring discounts
 - e. Figuring interest
 2. Speed and accuracy drill on the fundamental processes
 - a. Addition
 - b. Subtraction
 - c. Multiplication
 - d. Division
- B. Financial activities
 1. Cash payments
 - a. Verifying invoices and statements
 - b. Verifying and correcting credit-card statements
 2. Forms of cash payments
 - a. Using a checking account
 - (1) Keeping a checkbook
 - (a) Filling out the stub
 - (b) Writing a check
 - (c) Using a voucher check
 - (2) Stop-payment procedure
 - (3) Overdraft
 - b. Special checks
 - (1) Counter checks
 - (2) Certified checks
 - (3) Cashier's checks
 - c. Other forms of payment
 - (1) Bank drafts
 - (2) Money orders
 - (3) Traveler's checks
 3. Making bank deposits
 - a. Preparing coins and bills for deposit
 - b. Preparing checks for deposit
 - c. Preparing a deposit slip
 4. Reconciling bank statements
 - a. Systematic procedure for making the reconciliation
 - b. Locating errors
 5. Credit instruments
 - a. Notes and drafts
 - (1) Promissory notes
 - (2) Bank drafts
 - (3) Commercial drafts
 - b. Discounting notes and drafts

- C. Business forms
 - 1. Forms for purchasing and receiving
 - a. Purchase requisition
 - b. Request for quotation
 - c. Purchase order
 - d. Receiving record
 - e. Purchase invoice
 - 2. Forms for selling and sales procedure
 - a. Sales order forms
 - b. Credit approval
 - c. Billing or invoicing
 - d. Credit memorandum
 - e. Statements
- D. Financial records
 - 1. Financial statements
 - a. Income statement (Profit and Loss Statement)
 - b. Balance sheet
 - 2. Petty cash records
 - a. Establishing the fund
 - b. Making payment from the fund
 - c. Replenishing the fund
 - 3. Keeping the employer's expense records
 - a. Preparing expense reports for tax purposes and for company accountability
 - b. Keeping records of travel and entertainment
 - 4. Payroll and tax records
 - a. Payroll calculations
 - b. Financial reports and forms required
 - (1) Individual earnings record
 - (2) Tax and information returns made by employer

V. DATA PROCESSING

- A. Introduction to data processing
 - 1. Data processing as another name for office work
 - a. The processing of data by hand
 - b. The processing of data by machines
 - 2. The data processing cycle
 - a. Using business forms or source documents
 - b. Manipulating data by office machines
 - 3. The growing importance of data processing
- B. Principles of automation
 - 1. Defining automation
 - 2. Simplifying and mechanising office work
 - 3. Applying automation to simple office jobs
 - a. Carbon paper
 - b. Window envelopes
 - c. Pegboards
 - d. Keysort process
 - 4. The automated data-processing cycle
 - 5. Limitations of office automation

- C. Common language used by data processing equipment
 - 1. The need for a common language
 - 2. Language systems
 - a. Punched
 - (1) Numeric
 - (2) Alphabetic
 - b. Mark-sensed cards
 - c. Perforated paper tapes
 - d. Magnetic tapes
- D. Introduction to data processing systems
 - 1. The tabulating system or accounting system
 - a. Basic machines used in processing data
 - (1) Key punch
 - (2) Verifier
 - (3) Sorter
 - (4) Tabulator
 - b. Procedure followed in utilizing process
 - 2. Integrated data processing system
 - a. Operation of a IDP system
 - (1) The procedure of reproducing repetitive data mechanically
 - (2) Common language tape prepared by other machines such as typewriters, adding, calculating, billing, and bookkeeping machines
 - (3) Machines produce typed invoices or other business forms by reading the tape
 - b. Advantages of IDP
 - 3. Electronic-computer system
 - a. Digital and analog computers
 - b. Computer language--the binary code
 - c. Computer memory
 - (1) Computer words and addresses
 - (2) Instruction format

VI. COMMUNICATION TECHNIQUES AND TRANSMITTAL SERVICES

- A. Receiving the public in person
 - 1. Receiving callers
 - a. Making appointments
 - b. Preparing for visitors
 - c. Receiving a caller
 - d. Helping to terminate a call
 - e. Canceling appointments
 - 2. Doubling as a receptionist
 - a. Classifying callers
 - b. Handling callers
 - 3. Arranging meetings
 - a. Preparing for meetings
 - b. Taking the minutes
 - c. Following-up after meetings

- B. Telephone services
 - 1. Telephone assets
 - a. Essential voice qualities
 - b. Telephone courtesy
 - 2. Taking business calls
 - a. Answering calls
 - b. Giving identification
 - c. Screening calls
 - (1) Routine calls
 - (2) Calls for the boss
 - (3) Personal calls
 - d. Asking callers to wait
 - e. Offering assistance
 - f. Taking a message
 - g. Transferring the calls
 - h. Taking dictation by telephone
 - i. Terminating the call
 - 3. Making outgoing calls
 - a. Using the telephone directory
 - (1) The introductory pages
 - (2) The alphabetical pages
 - (3) Yellow pages (classified directory)
 - b. Planning business calls
 - c. Placing local business calls
 - (1) All-number dialing
 - (2) Interoffice calls
 - d. Placing long distance calls
 - (1) Types of long distance calls
 - (a) Station-to-station
 - (b) Person-to-person
 - (2) Direct distance dialing
 - (3) Mobile and marine services
 - (4) Overseas calls
 - e. Developing the call
 - f. Closing the call
 - 4. Special telephone services
 - a. Conference calls
 - b. Sequence calls
 - c. Appointment calls
 - d. Toll credit cards
 - 5. Specialized equipment in common use
 - a. Key telephone systems
 - b. The telephone switchboard
 - c. Speakerphone
 - d. Electronic secretary
 - e. Teletypewriter service
 - f. Automatic dialers
 - g. Data-phone
 - h. Touch-tone service
 - i. Telecord system

- C. Postal services and processing the mail
 - 1. How postal services help
 - a. Distance factor
 - b. Time factor
 - 2. Classes of mail
 - a. First-class mail
 - b. Second-class mail
 - c. Third-class mail
 - d. Fourth-class mail
 - 3. Special services
 - a. Special delivery
 - b. Special handling
 - c. Certificate of mailing
 - d. Certified mail
 - e. Registered mail
 - f. Insured mail
 - g. C.O.D. service
 - h. Tracing mail
 - 4. Postal rates
 - 5. Actual cost of a business letter
 - 6. International mail
 - a. Postal-union items
 - b. Parcel post
 - 7. Outgoing mail
 - a. Systems of handling outgoing mail
 - b. Precautions before releasing mail
 - c. Folding and inserting letters
 - d. Different styles and sizes of business envelopes
 - e. Skill in addressing envelopes
 - (1) Chain feeding envelopes
 - (2) Correcting errors in addresses
 - f. Stamps
 - (1) Affixing stamps
 - (2) Precanceled stamps
 - (3) Stamped envelopes and cards
 - (4) Metered mail
 - 8. Incoming mail
 - a. Opening the mail
 - b. Removing contents
 - c. Dating, sorting, and distributing mail
 - d. Underlining and annotating the mail
 - e. Arranging correspondence for employer
 - 9. Volume mailing
- D. Telegraph communications
 - 1. Selecting the type of service
 - a. The full-rate telegram
 - b. The day letter
 - c. The night letter
 - 2. The word count system for telegrams
 - 3. Telegraph rates
 - 4. Preparing telegraph messages
 - a. Format of a telegram
 - b. Typing telegrams

5. Composing telegrams
 6. How to file telegrams
 7. Other services available
 - a. Repeat back
 - b. Report delivery
 - c. Sending money
 - d. Hotel-motel reservation service
- E. Composing assignments of the secretary
1. Writing business letters
 - a. Principles of effective letterwriting
 - (1) The "C" qualities of letterwriting
 - (2) Effective tone in business writing
 - (a) The "you" attitude
 - (b) Avoiding old-fashioned expressions and unnecessary words
 - (3) Simplicity of vocabulary
 - (4) Writing forceful first and last sentences
 - b. Writing simple business letters
 - (1) Letters of acknowledgment
 - (2) Letters of inquiry
 - (a) Asking for information
 - (b) Making reservations
 - (3) Acceptance letters
 - (4) Letters concerning appointments
 - (5) Thank-you letters
 - (6) Letters ordering goods or services
 2. Composing notices
- F. Sources of information
1. Basic references with which secretarial employees should be familiar
 - a. Books containing information concerning people and business concerns
 - b. Books containing information concerning words
 - c. Books containing information dealing in facts
 - d. Books containing information concerning geography, travel, and transportation
 2. Using the school library to answer a variety of topics that could arise in the daily operation of a business
- G. Transportation
1. Business travel
 - a. Air travel
 - (1) Classes of service
 - (2) Making airline reservations
 - b. Train travel
 - (1) Classes of train travel
 - (2) Obtaining accommodations
 - c. Bus travel
 - d. Automobile rentals
 - e. International travel
 - (1) Passports
 - (2) Visa
 - (3) Vaccinations and inoculations

2. Making travel arrangements
 - a. Using the services of a travel agency or company transportation department
 - b. Preparation of the itinerary
 - c. Making reservations at a hotel or motel
 - d. Travel funds
 - (1) Travelers' checks
 - (2) Credit cards
 - (3) Letters of credit
 - e. Handling the office when the boss is away
 - (1) Handling correspondence
 - (2) Handling callers and telephone messages
3. Shipping services
 - a. Methods of shipping
 - (1) Messenger
 - (2) Parcel post
 - (3) Railway express and railway freight
 - (4) Truck
 - (5) Bus
 - (6) Boat
 - (7) Air express and air freight
 - (8) REA express
 - b. Shipping terms and abbreviations
 - c. Preparing materials for shipping
 - (1) Shipping papers
 - (2) Packing materials for shipping

VII. LEGAL FACETS

- A. Routine legal relations
 1. The contract
 - a. Formal contracts
 - b. Simple contracts
 2. Power of attorney
 3. Affidavit and verification
 4. Acknowledgment
 5. Bills of sale
 6. Deeds, leases, and mortgages
 7. Wills
- B. Preparing legal papers
 1. Characteristics of legal copy
 - a. Number of copies
 - b. Margins
 - c. Paragraphs
 - d. Signatures and seal
 2. Filling in legal forms
 3. Making a typewritten legal form
- C. Other legal duties
 1. Witnessing a signature
 2. Acting as a notary public

VIII. SEEKING EMPLOYMENT

- A. Job opportunities
 - 1. The nature of the job
 - a. Kinds of positions
 - (1) Clerical positions
 - (2) The stenographer and the secretary
 - b. Types of businesses or where stenographers work
 - (1) Those that produce goods
 - (2) Those that render services
 - (3) Those that distribute goods
 - (4) Those that render distribution assistance
 - (5) Those that render financial assistance
 - c. Size of the business
 - 2. The job market
 - a. Private enterprise
 - b. Governmental (civil service)
 - 3. Educational qualifications
 - a. Need for broader training and self-development
 - b. The certified professional secretary
- B. Locating job leads
 - 1. State employment service
 - 2. Newspaper advertisements
 - 3. Civil Service Commission
 - 4. Personnel offices
 - 5. Friends and family acquaintances
- C. Applying for the job
 - 1. Preparing a data sheet
 - 2. Writing a letter of application
 - 3. Filling out application blanks
 - 4. Finding out about the company
- D. Being interviewed for the job
 - 1. Checking your appearance
 - 2. Taking necessary materials with you
 - a. Letters of introduction
 - b. Data sheet
 - c. Social security card
 - d. Pen, sharpened pencils, shorthand notebook, ink eraser, and pocket-size dictionary
 - 3. Being prepared to answer typical questions asked of beginners
 - 4. Conducting yourself during the interview
 - a. Letting the interviewer take the lead in conversation
 - b. Looking at the interviewer
 - c. Keeping cool and calm
 - d. Speaking distinctly
 - e. Avoiding exaggerations
 - f. Stressing your ability and interest for the job
 - g. Explaining how you can improve while on the job

- E. Landing the job
 - 1. Being there bright and early
 - 2. Filling out forms neatly and completely
 - 3. Selling yourself at the interview
 - 4. Following up your application
 - a. The thank-you note
 - b. The return visit
 - c. Telephone check

IX. JOB SUCCESS

- A. Characteristics of job success
 - 1. Following instructions
 - 2. Considering the personal relationship factor
 - a. Relationships among employees
 - b. Relationships with employer
 - c. Relationships with the public
 - 3. Holding the job and growing into it
 - a. Making haste slowly
 - b. Avoiding socializing
 - c. Watching your grooming
 - d. Setting high standards of performance
 - e. Being a good listener
 - f. Asking questions
 - g. Learning names
 - h. Learning the business
 - i. Being alert
 - 4. Efficiency while working
 - a. Good housekeeping
 - b. Working methods
 - (1) Work flow pattern
 - (a) Efficient management of work area
 - (b) Efficiency of the general office layout
 - (2) Work simplification
 - (a) Rules of minimum effort
 - (b) Rules of symmetrical and rhythmical motion
 - (c) Rules of space and tool utilization
 - c. Handling supplies
 - 5. Self improvement
- B. The role of labor in job success
 - 1. Utah labor laws
 - a. Standard hours of employment in Utah
 - b. Minimum wage
 - c. Deductions
 - 2. The role of worker organizations
 - a. Advantages of unions
 - b. Disadvantages of unions
 - c. Union grievance procedures

X. UNDERSTANDING YOUR ORGANIZATION

- A. Types of business ownership
 - 1. Sole proprietorship
 - 2. Partnership
 - 3. Corporation
- B. Office organization
 - 1. The small office plan
 - 2. The departmentalized office plan
 - 3. The centralized office plan
 - 4. The combination plan
- C. Knowing where the orders come from--line of authority
 - 1. Line organization
 - 2. Functional organization
 - 3. Line and staff organization

Business Machines

Introduction

The business machines unit covers several types of machines. For the purpose of this unit, business machines will refer to the several mathematical processing machines, transcribing or voice-recording machines, and duplicating equipment.

Constant change has been taking place in the number and type of machines being used by business. This unit provides a splendid opportunity to teach important office procedures and to emphasize the use of machines as tools to complete office jobs. Machine knowledge includes the function, the operation, and the advantage of a particular type of machine over other types of machines.

Unit References

General Unit References. The following books and articles were used in the preparation of this unit:

Archer, Fred C., Raymond F. Brecker, and John C. Frakes.
General Office Practice. Second edition. New York: McGraw-Hill Book Company, 1963.

Place, Irene, and Charles B. Hicks. College Secretarial Procedures. Third edition. New York: McGraw-Hill Book Company, 1964.

Thompson, Robert J. "New Media in Teaching Business Machines," New Media in Teaching the Business Subjects, Third Yearbook of the National Business Education Association. Washington, D. C.: National Business Education Association, 1965.

Texts Used by Students. Adopted student texts for this unit were:

Meehan, James R., and Gilbert Kahn. How to Use Adding Machines--Ten-Key, Full-Key, Printing Calculator. New York: McGraw-Hill Book Company, 1962.

Meehan, James R. Using Rotary Calculators in the Modern Office. New York: McGraw-Hill Book Company, 1965.

Texts Used by Teacher. The following supplementary texts were selected to aid in the teaching of this unit:

Richards, William and Robert Woodward. Duplication Dos and Don'ts. Portland, Oregon: Allied Publishers, Inc., 1959.

Robichaud, Beryl. Understanding Modern Business Data Processing. New York: McGraw-Hill Book Company, 1966.

Unit Objective

The unit on business machines was included in order to acquaint students with the methods of operating business machines and of performing typical office tasks. Specific objectives relating to the fulfillment of this broad objective are: (1) to become familiar with the latest business equipment and machines; (2) to develop an accurate concept on how office machines can be used to expedite business activities; (3) to obtain a reasonable degree of efficiency in the basic operation of three commonly used adding and calculating machines; (4) to become familiar with the many business forms and problems encountered in a typical office through realistic and practical

business situations; (5) to develop a practical knowledge and skill in the operation of voice-writing equipment; and (6) to become familiar with duplicating processes and equipment.

Unit Outline for Business Machines

I. DUPLICATING PROCEDURES AND EQUIPMENT

- A. Basic factors in duplicating
 - 1. Requirements
 - a. Number of copies
 - b. Characteristics of the copy
 - c. Color
 - d. Size of copy
 - e. Type of paper
 - f. Number of sides used
 - g. Quality desired
 - h. Speed
 - i. Cost
 - 2. Processes available
 - a. Carbon paper
 - b. Hectographic (dye) process
 - c. Stencil process
 - d. Offset process
 - e. Photocopying process
 - f. Printing process (letterpress)
- B. The fluid hectograph or spirit process
 - 1. How the hectograph process can be used in the office
 - 2. Advantages and disadvantages of the process
 - 3. Preparing the master
 - a. Typing a master
 - b. Using several colors of hectographic carbon paper
 - c. Making corrections
 - 4. Operating the duplicator
 - 5. The azograph or solograph process
- C. The stencil process
 - 1. How the stencil duplicator can be used in the office
 - 2. Advantages and disadvantages of the process
 - 3. Preparing the stencil
 - a. Planning the layout
 - b. Drawing and lettering techniques
 - c. Making corrections
 - 4. Operating the duplicator
 - 5. Using electronically prepared stencils or the facsimile process

- D. Offset duplicating
 - 1. How the offset duplicator can be used in the office
 - 2. Principles of offset duplication
 - 3. Advantages and disadvantages of the process
 - 4. Preparing the master
 - a. Direct image
 - b. Photo-offset
- E. Photocopying process
 - 1. How the photocopying machine can be used in the office
 - a. Using the process for cross-referencing
 - b. Mail-routing procedures
 - 2. The growing importance of the photocopying machine
 - 3. Advantages and disadvantages of the process
 - 4. Basic classifications of office copiers
 - a. The dry copying process
 - (1) Thermography
 - (2) Electrostatic
 - b. The liquid-developer or wet process
 - (1) Diffusion transfer
 - (2) Dye transfer
 - (3) Stabilization
 - (4) Diazo

II. DICTATING AND TRANSCRIBING MACHINES

- A. The purpose of dictating or voice-recording equipment
 - 1. Using dictating machines in the modern office
 - 2. The growth and importance of machine transcription
- B. Types of equipment
 - 1. Dictating model
 - 2. Transcribing unit
 - 3. Combination dictation and transcription unit
 - 4. Portable dictation unit
 - 5. Network dictation equipment
- C. Types of recording machines
 - 1. Plastic and magnetic belt recorders
 - 2. Disc recorders
 - 3. Magnetic tape recorders
 - 4. Tape recorders
- D. Learning to transcribe on the machine
 - 1. Learning how to operate the equipment
 - 2. Points to remember when transcribing
 - 3. Practice in transcribing from pre-cut belts
- E. Learning how to dictate
 - 1. Learning how to operate the equipment
 - 2. Points to remember when recording

III. COMPUTING MACHINES

A. Listing machines

1. Full-keyboard listing machines
 - a. The declining importance of this type of machine in the office
 - b. Functions that the equipment will perform
 - (1) Used primarily for addition and subtraction
 - (2) Multiplication and division can also be performed
 - c. Procedure for operating the machine
2. The ten-key adding-listing machine
 - a. The role of the ten-key adding machine as the basic computing machine of the office
 - b. Functions that the equipment will perform
 - (1) Touch operation
 - (2) Primarily used for addition and subtraction
 - c. Procedure for operating the machine
 - d. Fundamental operations
 - (1) Addition
 - (2) Subtraction--positive and credit balances
 - (3) Multiplication--whole numbers, decimals, and fractions
 - (4) Division
 - e. Office projects using the machine
 - (1) Sales slips
 - (2) Sales summaries
 - (3) Invoices
 - (4) Purchase orders
 - (5) Checks
 - (6) Deposit slips
 - (7) Bank statements
 - (8) Financial statements
 - (9) Ledger accounts
 - (10) Time cards
 - (11) Payrolls
 - (12) Sales and commission reports
3. Printing calculators
 - a. The increasing importance of the printing calculator in the office
 - b. Functions that the equipment will perform
 - (1) Used extensively as an all-purpose calculator
 - (2) Primarily used for speed in multiplication and division work
 - c. Procedure for operating the machine
 - d. Fundamental operations
 - (1) Addition by touch
 - (2) Subtraction--positive and credit balances
 - (3) Multiplication--whole numbers, decimals, fractions, accumulative, and constant
 - (4) Division--simple and extended quotient

- B. Non-listing machines
 - 1. The key-driven calculator
 - a. The declining role of the key-driven calculator in the office
 - b. Functions that the equipment will perform
 - (1) Used primarily for billing
 - (2) Used primarily for addition and multiplication
 - c. Procedure for operating the machine
 - 2. Rotary calculators
 - a. The role of the rotary calculator as an all-purpose machine in the office
 - (1) Billing
 - (2) Statistical work
 - b. Basic procedure for operating the machine
 - c. Fundamental operations
 - (1) Addition
 - (2) Subtraction
 - (3) Multiplication
 - (4) Division
 - 3. The electronic calculator
 - a. The advent of this new type of machine
 - b. Functions that the equipment will perform
 - c. Speed and ease of operation
 - d. Basic procedure for operating using a ten-key input

CHAPTER V

RECOMMENDATIONS AND SUMMARY

Recommendations for Course Organization

In order to currently implement the course of study given in Chapter IV, the following recommendations were made:

1. Whenever possible the battery approach should be the method selected to present the non-business machine topics. Inasmuch as the battery plan makes more economical use of the teacher's time, instruction on a group basis makes it possible for the students to progress more rapidly and class time to be utilized more effectively.

2. Since the program will be handicapped by having only a minimum amount of equipment, a rotational plan for the economical use of equipment should be applied during the business machines unit.

3. As much equipment as possible should be available in the classroom, including office machines and miscellaneous supplies. However, it will be necessary to utilize duplicating equipment from the school office during the business machines unit.

4. The office procedures and business machines units will be taught by a team of two teachers. Since some of the topics in the Clerical Training program and the Secretarial Studies program will be similar, a team composed of the Clerical instructor and the Secretarial Studies instructor will teach these topics.

5. The course topics will be arranged in a timetable of activities. This planning must be done in order to utilize time, aid in formulating a team approach, and schedule audio-visual aids.

Suggested Timetable of Activities During the Year

The skills, attitudes, and understandings listed in the unit outlines in Chapter IV can be developed by following a suggested timetable. Shorthand and typewriting or transcription skills should be developed each day. In order to divide the class time so that all units will have sufficient time devoted to them, the following time chart could be utilized:

<u>Week</u>	<u>Activity</u>
1	Introduction to course, organization of materials for course, pretesting of shorthand and typewriting ability, review of shorthand principles, typewriting skill development, fitting yourself into business--qualifications and duties of a stenographer
2	Review of shorthand principles, reconstruction of basic typewriting skills, fitting yourself into business--personality and personal appearance
3	Shorthand practice, typewriting skill development, production typewriting--introduction to manuscript typing, seeking employment
4	Shorthand practice, typewriting skill development, production typewriting--manuscript exercises, seeking employment
5	Shorthand practice, typewriting skill development, production typewriting--introduction to tabulation, communication techniques and transmittal services--receiving the public
6	Shorthand practice, typewriting skill development, production typewriting--introduction to correspondence typing, communication techniques and transmittal services--telephone services
7	Shorthand practice, typewriting skill development, production typewriting--correspondence typing, communication techniques and transmittal services--postal services and processing the mail

<u>Week</u>	<u>Activity</u>
8	Shorthand practice, typewriting skill development, production typewriting--correspondence typing, communication techniques and transmittal services--telegraph communications
9	Shorthand practice, introduction to transcription, office equipment and supplies, communication techniques and transmittal services--sources of information
10	Developing sustained shorthand writing power, developing transcription techniques, communication techniques and transmittal services--transportation
11	Developing sustained shorthand writing power, developing transcription techniques, production typewriting--business forms, financial duties
12	Developing sustained shorthand writing power, developing transcription techniques, production typewriting--graphic presentation, financial duties
13	Shorthand practice, production typewriting--report problems, transcription practice, financial duties, introduction to data processing
14	Shorthand practice, production typewriting--report problems, transcription practice, data processing
15	Shorthand practice, production typewriting--duplicating processes, transcription practice, introduction to duplicating procedures and equipment
16	Shorthand practice, transcription practice, applying rules of English composition, introduction to dictating and transcribing machines, introduction to computing machines
17	Transcription practice, applying rules of English composition, shorthand practice, business machines practice according to rotation chart
18	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
19	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
20	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
21	Transcription practice, applying rules of English composition, shorthand practice, business machines practice

<u>Week</u>	<u>Activity</u>
22	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
23	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
24	Transcription practice, applying rules of English composition, shorthand practice, business machines practice
25	Transcription practice, applying rules of English composition, shorthand practice, records control (filing)
26	Sustained transcription practice, shorthand practice, records control (filing)
27	Sustained transcription practice, shorthand practice, records control (filing)
28	Sustained transcription practice, shorthand practice, records control (filing)
29	Shorthand practice, transcription practice, business machines practice, practice Civil Service examination
30	Shorthand practice, transcription practice, business machines practice, practice Civil Service examination
31	Shorthand practice, transcription practice, business machines practice, practice Civil Service examination
32	Transcribing office-style dictation, business machines practice, shorthand practice
33	Transcribing office-style dictation, production typewriting--correspondence problems, communication techniques and transmittal services--composing assignments
34	Transcribing office-style dictation, production typewriting--correspondence problems, communication techniques and transmittal services--composing assignments
35	Shorthand practice, transcription practice, production typewriting--legal papers, legal facets
36	Final examinations, job success, understanding your organization

A study of the timetable indicates that frequent changes in topics have been made. It has not been necessary to follow the unit outlines

step by step, since the typewriting and office procedures units can be shifted around in order to give the teacher flexibility in constructing a timetable of activities and to provide the variety necessary to maintain student interest.

No attempt should be made to keep a rigid timetable of activities year after year. It will be necessary to revise this chart each year in order to utilize additional changes in office technology and methodology and to adjust the topics and time allotments to current student needs.

Suggested Machine Rotation Schedule

The following schedule allots sixty hours to machine laboratory activities. Introductory demonstrations and assignments are made in advance in order that all shifts or rotations can take place very smoothly and efficiently.

The machine activities were placed into three blocks or cycles of twenty hours each. Eight students were placed on equipment and assignments in each cycle.

The following machine activities will be included in each cycle:

Cycle A

Ten-Key Adding Machines--20 hours

Cycle B

Rotary Calculators--5 hours
Statistical Typewriting and
Ten-Key Adding Machines--5 hours
Printing Calculators--5 hours
Office Manager--5 hours

Cycle C

Duplicating--10 hours
Transcribing Machines--5 hours
Advanced Typewriting--5 hours

Six students will receive special assignments. It will be the duty of the two office manager to check the machine performance of other machine students and greet visitors to the classroom. The two students

assigned to statistical typewriting projects will do long-carriage tabulation projects with multiple carbons that also require the use of the ten-key adding machine for tabular calculations. Outside typewriting projects from the school administration and manuscript projects will be assigned to the students in the advanced typewriting section.

The following rotation schedule could be used:

Laboratory Interval (20 Hours)	Team 1	Team 2	Team 3
1	Cycle A	Cycle B	Cycle C
2	Cycle B	Cycle C	Cycle A
3	Cycle C	Cycle A	Cycle B

Schedule revisions in the periods of training will be necessary when changes have been made in the number and types of business machines available.

Long-Range Recommendations

Curriculum Development

1. No attempt should be made to retain a rigid curriculum content. There should be continuous experimentation and refinement in the program as methodology and techniques change.
2. The program should be expanded to accommodate thirty students.
3. A closer correlation between the elementary shorthand and typewriting programs should improve the Secretarial Studies program.
4. The school should investigate the possibility of including a block-time course at the elementary shorthand level.

5. On-the-job training through a cooperative work experience program would be an asset to the program in preparing students for employment after they leave school.

Physical Facilities

1. Electrical outlets should be located on the floor in order to provide for adequate future expansion of the program.

2. Because of crowded room space arrangement, the L-shaped desks should be replaced with Z-shaped desks. This change would be in keeping with the total long-range departmental plans, and the L-shaped desks could be used to equip an elementary shorthand laboratory.

3. Swivel chairs should be added at all desks that contain typewriters in order to efficiently change course activities with a minimum of confusion in the laboratory.

4. An audio-learning laboratory would be of great assistance in the handling of individual student differences in shorthand.

5. Electric machines and appliances should be utilized whenever possible.

6. Type faces on typewriters should range from micro-elite to primer type in order to perform the special typewriting jobs frequently expected of this class. At least one executive typewriter should be available.

7. Typewriters should also be available in varying carriage lengths.

8. Training in the use of rotary calculators should be expanded. Further study should be given to including rotary calculators with a ten-key input media in the laboratory.

9. The amount of training provided on dictating-transcribing machines should be increased. This would require the purchase of additional dictating-transcribing equipment.

10. Duplicating equipment should be available in the room. Students should be given the opportunity of becoming acquainted with the use of the photocopier and stencil duplicator. Plans should be made to add a fluid-process machine and a table-top offset duplicator.

Summary

This report was undertaken to prepare a course of study to aid in the teaching of a block-time class entitled Secretarial Studies. The course of study was divided into five major units or subject areas: advanced shorthand, transcription, advanced typewriting, office procedures, and business machines. An outline containing objectives, references, and instructional information was developed for each of the five units. A timetable of activities and a rotation chart were suggested as guides to implementing these unit outlines.

A course of study should aid the teacher in executing his task more efficiently. The ideal course should help the student to learn to do better the activities that he will likely encounter on the job. Consideration must be given to the students receiving training with regard to their individual needs, their maturity, and their mental ability. Consideration must also be given to an up-grading of the general conditions under which instruction will be given. The general course of study must be adapted to the particular needs of the students each year.

Because of continuous experimentation and change, the course of today bears little resemblance to the course of two decades ago.

One wonders what changes the next decade will bring to the teaching of vocational secretarial education. Changes and continual refinements in methodology and technology must be considered realistically inasmuch as they affect the student's vocational life. This course of study was designed to present a basis from which to work as new developments occur.

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