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A SURVEY OF THE TEACHING OF FILING IN THE PUBLIC WHITE HIGH SCHOOLS  
OF NORTH CAROLINA AND OF FILING ACTIVITIES IN OFFICES REPRESENTED  
IN AREA 3 OF THE NATIONAL OFFICE MANAGEMENT ASSOCIATION

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by

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## CHAPTER I

### INTRODUCTION

#### Statement of the Problem

This study developed out of the planning of units to be included in a high school clerical practice course. For a learning unit in filing, two types of information were desired: (a) information about the filing instruction in the North Carolina high schools, and (b) information about the filing in business offices. The purpose of this study is to ascertain the status of filing in the public white schools of North Carolina and to evaluate the findings according to information obtained from business offices in the state.

Answers to the following questions were sought from the schools:

1. To what extent is filing taught in North Carolina schools?
2. If filing is taught, is it offered as a separate subject or included as a learning unit within a course?
3. What are the courses in which filing units are offered?
4. What equipment is used in the schools for the teaching of filing?

Background information concerning the size of the schools in terms of pupil enrollment and number of full-time and part-time teachers of business subjects, and the grade levels of the business courses offered was requested in addition to data on specific aspects of filing instruction.

The business offices were asked to supply data about type of business, total number of office employees, whether the office was head office or branch office, and information to provide answers to the following specific questions about filing activities:

1. How many office employees are file clerks or perform filing duties?

2. What methods and systems of filing are most frequently used in business offices?
3. To what extent is there in-service training for the people who do the filing?
4. Is the school's training program for prospective file clerks considered adequate?
5. What aspects of filing do the businessmen think should be included in the high school training?

#### Sources of Data and Procedures

To obtain the data, two questionnaires were prepared: one for business teachers and one for businessmen. A list of business teachers in the white schools for the school year 1947-48 was obtained from the State Department of Public Instruction. Private high schools, orphanages, and church schools were eliminated since they are not subject to the same control and standards as the public high schools. When these were excluded, the public high schools numbered 379. The list from the State Department included the name of every teacher teaching a business course, as recorded in the Preliminary Reports of the High School Principals. For this study, the first-named teacher for each school was assumed to be the head of the department, and the questionnaire was directed to that teacher.

The business offices were selected through Area 3 of the National Office Management Association. This area includes five chapters, located in Charlotte, Greensboro (Piedmont Chapter), and Raleigh, in North Carolina; in Richmond, Virginia; and in Greenville, South Carolina. Names and addresses of the secretaries of the five chapters were obtained from the secretary of the Piedmont Chapter in Greensboro. The secretaries, in turn, supplied the names and addresses of their members, numbering 258 members in 185 business offices. Educational members were excluded from the list to be sampled in this study because of the probability that their offices would not be representative of business office situations.

The National Office Management Association (NOMA) is a nonprofit organization, established in 1919, with the following stated aims:

1. To promote a free exchange of ideas on office organization among its members.
2. To encourage the work of standardization and to determine, in so far as possible, general standards of office work applicable to all industries.
3. To initiate and effect the application of scientific methods to the problem of office management and organization.
4. To assist established educational and other institutions to interpret the needs of commerce and industry in so far as the curriculum of study and training for a business career are concerned.
5. To establish and maintain a close fraternal relation between executives and others interested in office organization and management.

Chapter II gives a detailed description of the schools and business offices included in this study.

#### Questionnaire for the Schools

The preliminary preparation for the construction of the questionnaires included a study of textbooks and reference books on filing, and teacher's manuals for general business, junior business, secretarial practice, and office management, to get a complete listing of methods, systems, equipment, and supplies pertaining to filing.

A tentative questionnaire for the schools was constructed, covering pupil enrollment, number of teachers of business subjects, offerings in business courses, teachers' opinions about including filing instruction, time allotments for filing instruction, and methods, systems, equipment, and supplies used in filing instruction. With the assistance and criticism of two fellow seminar members with office and teaching experience, and a college professor experienced in office work, teaching, and research, the writer modified the questionnaire to minimize opinion questions and to elicit factual information. So far as clarity would permit, the questionnaire was

then transformed into a check list. Some items were restated to make them clearer, more specific, or more objective, or to diminish the time and effort required of the respondents.

The resulting form consisted of five pages so arranged that schools offering no filing need not continue beyond the second page. The remaining pages, for schools offering filing instruction, presented detailed check lists pertaining to equipment, materials, methods, and systems used. Before the revised questionnaire-check list was put in form for circulation to the schools, it was administered to five teachers of high school business subjects, and was submitted for criticism to two additional college professors, one of whom is an educational member of the National Office Management Association and experienced in the teaching and supervision of business subjects, and the other experienced in the teaching of filing and in supervision of the teaching of clerical skills and practice. The high school teachers to whom the questionnaire was experimentally administered had no difficulty in filling in the information requested, and considered the forms adequate and complete, making no suggestions for changes. The consultants suggested minor improvements in the sequence of items and recommended the inclusion of a question concerning follow-up studies which might yield data on filing duties of former high school personnel engaged in office occupations. When these suggestions were incorporated, the forms were mimeographed, and a letter of transmittal was prepared to accompany each questionnaire. A copy of the questionnaire and the letter are included in Appendix I.

The questionnaire-check list and the letter of transmittal were mailed early in February, 1948, to the 379 heads of business education departments in the public white high schools of North Carolina listed by

the State Department. Four weeks later, a follow-up in the form of a postal card was sent as a reminder to those who had not responded to the questionnaire. Four weeks after the postal card was sent, a second copy of the questionnaire was mailed with a revised letter of request to the teachers who had not responded. Another postal card reminder was sent after three weeks to the remaining 70 teachers who had not responded. Copies of follow-up cards and letters are presented in Appendix I.

#### Questionnaire for the Businessmen

The questionnaire for the businessmen was a two-page form requesting data on number of workers doing filing, number of office employees, classification as to head or branch office, kind of filing organization, filing methods and systems, on-the-job training programs, and employers' opinions about school training in filing.

This questionnaire-check list was submitted to the two college professors who had cooperated in the preparation of the questionnaire for the schools. They suggested minor improvements for brevity and clearness, which were incorporated. The questionnaire and a letter of transmittal were then mimeographed and mailed in February, 1948, to the representatives of the 185 offices in Area 3 of the National Office Management Association. After five weeks, a card was sent as a reminder to those who had not responded. A second copy of the questionnaire with a revised letter of transmittal was sent three weeks after the postal card reminder. Copies of the questionnaire, the letters of transmittal, and the follow-up cards and letters are given in Appendix I.

## Returns from the Questionnaires

The Schools. A Total of 328 responses were received from the schools. Of these, 23 respondents provided no data, explaining that their offerings were too meager or that the department was in the early stages of organization. The remaining 305 responses, or 80 per cent of the North Carolina public white high schools offering business courses, provided the data presented here. For purposes of this study, the data reported are accepted as official, although in some instances the high enrollment figures suggest that they may be total school enrollments instead of high school only.

Only 57 schools were found to have made follow-up studies, and of these only 8 could have provided data on filing activities of employed graduates. Hence, as a source of data for that phase of this investigation, follow-up studies were excluded.

The Business Offices. Data were received from 112, or 60 per cent of the 185 offices canvassed. Other offices acknowledged the request but did not return the questionnaire. A few letters accompanying unanswered questionnaires indicated that the individuals felt that their offices were insignificant in contrast with larger offices and should not contribute to the study.

## Review of the Literature

Filing is defined as "the act of placing papers, cards, books, or other material in systematic arrangement so that they may be found instantly when wanted."<sup>1</sup>

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1. Progressive Indexing and Filing, Library Bureau Division, Remington Rand, Inc., Buffalo, New York, p. xiii.



That filing is an important office activity is evidenced in the recognition of filing duties as a part of the vocational training of the schools preparing clerical workers, by authors of textbooks dealing exclusively with filing, by other authors who have included instructional units on filing in their textbooks, by office and personnel managers and employees of various firms who have assisted researchers in gathering data or have furnished information for writers of published articles, by the office managers who cooperated in the present study, by equipment companies dealing with filing equipment and supplies, and by contributions of both businessmen and educators to the literature on filing published in business education periodicals.

Examination of the professional literature revealed few researches made exclusively in the field of filing. Jane Foster reported in 1937 a study entitled Analysis of the Filing Activities of Office Workers.<sup>2</sup> One of her stated reasons for selecting filing as her research topic was the fact that all offices require some filing. Foster submitted questions about filing duties to a group of stenographers, to a group of office workers whose major work was typewriting but not shorthand, and to a group of general clerical workers who did not use any shorthand or typewriting. She sought to find the frequency and importance of performance of filing duties and opinions of the workers as to whether they thought instruction was needed. She concluded that filing is of sufficient importance to be offered as a unit of instruction by itself, but suggested that in the smaller high schools filing would be better left, as found in these schools, within courses of stenography, office practice, secretarial training, or

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2. Jane Foster, Analysis of the Filing Activities of Office Workers, Unpublished Master's Thesis, State University of Iowa, Iowa City, 1937.

junior business training. She recommended that the school course of study should include:<sup>3</sup>

". . . indexing letters by subject; indexing letters by name on letterhead; determining indexing classification by careful reading; arranging papers in chronological order; filing by direct alphabetic method; indexing letters by name of writer; indexing letters by person addressed; indexing letters by location; indicating on correspondence that it is ready to be filed; mending materials in the files; pencil marking portions of letters to which attention has been given in filing; indicating coding with colored pencil.

"In addition, instruction should be given as to the use of a cross reference sheet and method of tabulating and indexing correspondence."

Thelma M. Potter in 1944 analyzed the duties of general clerical employees in a group of large offices in New York and Baltimore. In summarizing the results with respect to filing, Potter commented that the time allotment for filing instruction in schools will not permit instruction in all of the variations of filing arrangements, and suggested that emphasis in the training programs of the schools be placed on the development of speedy handling of materials, particularly in the use of the alphabetic arrangement since it is the core of all filing systems.<sup>4</sup>

Filing was found by Parker Liles to be the third most important area of clerical work in his recent research on the factors in the training of clerical workers in Atlanta. His finding about the importance of filing placed it in the "major areas," with recommendations that sufficient emphasis be given to develop vocational competency.<sup>5</sup>

In a study of the activities of the graduates of the Greenville (North Carolina) High School in 1939, Laura Mattocks Bell concluded that

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3. Ibid., p. 188.

4. Thelma M. Potter, An Analysis of the Work of General Clerical Employees, Bureau of Publications, Teachers College, Columbia University, Contributions to Education, No. 903, New York, 1944, pp. 36-37.

5. Parker Liles, "Some Factors in the Training of Clerical Workers," Modern Business Education, March, 1948, p. 19.

"a course in office practice would be useful to the bookkeeper and general clerical worker," and that "part of the course should be devoted to filing."<sup>6</sup>

Irene Place conducted a study of the duties of personal secretaries in offices in sixteen communities in Michigan. Among the ten duties most frequently performed, she found filing third in ranked frequency. Of 226 secretaries reporting, 87.4 per cent performed general filing duties; 82 per cent did alphabetic filing; 70.1 per cent maintained personal files for the employer; 63 per cent did subject filing; 59.4 per cent maintained a follow-up or "tickler file"; 58.1 per cent maintained a card file; 45.2 per cent kept a clipping file or scrapbook; 12.4 per cent did numeric filing; and 7.5 per cent did geographic filing.<sup>7</sup>

In Seattle, Washington, a joint committee of representatives from the Seattle Chapter of NOMA, from the Seattle Public Schools, and from the University of Washington, made a study of business education in the Seattle schools in 1946. Filing received a prominent place in the listing of the duties of clerical office workers given in that report.<sup>8</sup>

Marsdon A. Sherman, serving as analyst for clerical and stenographic positions, made a survey of 14,000 Virginia state employees in 1946 for the "purpose of evaluating and setting up a new set of job specifications."<sup>9</sup> His composite list of activities included coding, filing, and sorting material.

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6. Laura Mattocks Bell, Occupational Survey of Greenville, North Carolina and a Follow-Up Survey of the Graduates of Greenville High School for the Years 1934-38 Inclusive, Unpublished Master's Thesis, University of North Carolina, Greensboro, 1939, p. 72.

7. M. Herbert Freeman, "Research Notes," American Business Education, December, 1946, pp. 149-150.

8. ----- Business Education: The Door to the New Frontier, Report of a Study of Business Education in Seattle, Washington, 1946, p. 22.

9. Marsdon A. Sherman, "Job Analysis for Effective Teaching," Business Education World, March, 1946, p. 374.

In analyzing the factors of general clerical training, Elizabeth Keaton of the Hinton (West Virginia) High School stated that "census reports and other surveys reveal that the greatest percentage of young workers, outside of those occupations classified as trades, are in clerical positions." As a part of the general clerical training program in schools, she recommended that "filing procedures and the use of simple business machines should be stressed to the point of developing marketable skills."<sup>10</sup>

A report given before the Pittsburgh Chapter of NOMA on January 15, 1946, by Clem Boling, Director of Commercial School Education for the South-Western Publishing Company, presented the specifications for twelve different jobs that a Detroit placement director had listed for him. In mentioning one job, Mr. Boling commented that a number of studies have shown that filing is one of the common responsibilities of stenographers and secretaries.<sup>11</sup>

The general literature of business education presents viewpoints of businessmen and educators on various aspects of filing and filing instruction. Numerous references are listed each year in the Business Education Index on the specific topic of filing and on the integration of filing instruction with school offerings in general clerical programs, office practice, or secretarial practice. Articles are published in such magazines as the Journal of Business Education, National Business Education Quarterly, UBEA Forum, Business Education World, and the Balance Sheet. Occasional mention is also given to filing in the professional yearbooks, as in the following statement in the American Business Education Yearbook for 1948: "Since the duties of every office worker involve the direct or indirect use

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10. Elizabeth Keaton, "Analysis of Factors in General Clerical Training," Modern Business Education, November, 1947, p. 3.

11. Clem Boling, "What the Schools Are Doing In Preparing Young People for Business," American Business Education, December, 1946, p. 109.

of files, instruction in filing is a necessary part of the office practice course."<sup>12</sup>

House organs of business firms, particularly those supplying equipment and services, provide further articles from businessmen and specialists. Ellen Libby Eastman's article on the "Use and Preparation of a Filing Manual,"<sup>13</sup> in the Office Economist, is an example.

The literature of management, too, gives recognition to the importance of filing. The Subject Index of Management Guide lists various articles on filing which have been selected for condensation and reprinting from the many management magazines reviewed by Management Guide.

Office managers are giving consideration to filing in their conferences and discussions, both in connection with other management problems and as a specific topic of planned forums. "Adequate Filing Systems" was the program topic of a recent monthly meeting of one of the NOMA chapters participating in this study.<sup>14</sup>

Filing is not elementary, in the expressed opinion of Julius B. Kaiser, archivist of Standard Brands, Inc., of New York. He holds that every office worker should know a good deal about filing, and that those who are file clerks should know even more; "every office employee needs to know filing--if only to know to let a properly trained filing clerk do the 'put-and-taking.'"<sup>15</sup>

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12. ----- "Physical Layout, Equipment, Supplies for Business Education," American Business Education Yearbook, Vol. V, New York, 1948, p. 190.

13. Ellen Libby Eastman, "Use and Preparation of a Filing Manual," Office Economist, No. 4, 1944, pp. 4ff.

14. NOMA Roster and Program for 1947-48, Greenville, South Carolina, p. 6.

15. Julius B. Kaiser, "A Future in Filing," Business Education World, November, 1947, pp. 140-141.

## CHAPTER II

### THE COOPERATING GROUPS

This chapter furnishes a description of the two groups participating in the survey. The 305 schools represent 80 per cent of the public white schools in North Carolina which included business offerings in their 1947-48 programs as listed by the North Carolina Department of Public Instruction. The 112 business offices represent 60 per cent of the 185 offices holding membership in Area 3 of the National Office Management Association.

#### The Schools

The schools included in the study range in size from one very large school with 1,914 pupils to one very small school with only 36 pupils enrolled. Most of the schools are small, as is apparent from inspection of Table 1. Seventy per cent of the 280 schools which furnished data for the tabulation had fewer than 300 pupils enrolled; 61 per cent had fewer than 250 pupils; and 13 per cent had fewer than 100 pupils. The total enrollment was 75,285. Incomplete data on the enrollment of pupils in the business courses give a total of 8,216 pupils taking two or more business courses in 264 schools, and 15,153 pupils taking only one business course in 273 schools.

There were 442 teachers of business courses in the 305 schools in 1947-48. Table 2 shows that 211 of the 442 business teachers were in one-business-teacher departments; and in 53 of these departments, the teacher

TABLE 1

DISTRIBUTION OF 280 SCHOOLS OFFERING BUSINESS SUBJECTS,  
ACCORDING TO SIZE OF ENROLLMENT

No. Pupils Enrolled in School	No. of Schools
1- 49	1
50- 99	39
100- 149	55
150- 199	54
200- 249	38
250- 299	26
300- 349	10
350- 399	9
400- 449	9
450- 499	6
500- 549	7
550- 599	1
600- 649	4
650- 699	3
700- 749	2
750- 799	3
800- 849	-
850- 899	1
900- 949	2
950- 999	2
1000-1049	1
1050-1099	1
1100-1149	1
1150-1199	-
1200-1249	1
1250-1299	-
1300-1349	1
1350-1399	1
1400-1449	1
.....	
.....	
1900-1949	1
Not stated	25
Total schools in study	305

gave only part time to instruction in business courses. Ninety-one per cent of the schools employed not more than two business teachers. The one school shown in Table 2 to have nine business teachers is a county high school with an enrollment of 1,914 pupils. Its program includes four vocational commercial curriculums leading to proficiency certificates.

The nature of the question in the questionnaire pertaining to certification of teachers in various courses unfortunately resulted in data which are not informative about the proportion of teachers certified in the courses they are teaching. However, Table 3 gives some evidence that business courses were being taught by teachers not certified in the subjects they were teaching. For example, in 44 schools typewriting was taught by teachers not certified in business. Such technical courses as shorthand and bookkeeping, and even distributive education, were taught by teachers not certified. Some of the other business subjects may have been taught by teachers certified in other areas but not in business subjects. Instances were noted where the general business course was taught by the English teacher, the mathematics teacher, or the science teacher. One school offered general business taught by the fourth grade teacher, and one respondent stated that general business was taught by two teachers in other departments.

Information about the courses taught by teachers having had formal instruction in filing was furnished by 157 respondents and is listed according to courses in Table 4. Typewriting, bookkeeping, shorthand, and general business were most often reported as being taught by a teacher having had formal instruction in filing, but they are likewise the subjects most frequently offered in the schools.



TABLE 2

FULL-TIME AND PART-TIME TEACHERS OF BUSINESS SUBJECTS  
IN 305 SCHOOLS

No. of teachers in Bus. Dept.	No. of Schools	Number of Business Teachers		
		Full-time	Part-time	Total
1	211	158	53	211
2	68	63	73	136
3	17	29	22	51
4	6	15	9	24
5	1	2	3	5
6	1	4	2	6
7	---	---	---	---
8	---	---	---	---
9	1	7	2	9
Total	305	278	164	442

TABLE 3

BUSINESS COURSES TAUGHT BY TEACHERS NOT CERTIFIED  
IN BUSINESS SUBJECTS

Course	No. of Schools
Typewriting . . . . .	44
General Business . . . . .	40
Business Arithmetic . . . . .	18
Bookkeeping . . . . .	13
Shorthand . . . . .	11
Business Law . . . . .	6
Business English . . . . .	4
Economics . . . . .	3
Economic Geography . . . . .	2
Business Correspondence . . . . .	1
Office Practice . . . . .	1
Consumer Economics . . . . .	1
Distributive Education . . . . .	1
Business Administration . . . . .	1
Spelling . . . . .	1

TABLE 4  
COURSES TAUGHT BY TEACHERS HAVING HAD FORMAL INSTRUCTION  
IN FILING

Course	No. of Schools
Typewriting . . . . .	117
Shorthand . . . . .	96
Bookkeeping . . . . .	76
General Business . . . . .	48
Business Arithmetic . . . . .	10
Business Law . . . . .	8
Secretarial Practice . . . . .	7
Business Correspondence . . . . .	6
Business English . . . . .	5
Office Practice . . . . .	5
Filing . . . . .	4
Clerical Practice . . . . .	4
Principles of Selling . . . . .	3
Consumer Economics . . . . .	2
Distributive Education . . . . .	1
Economic Geography . . . . .	1
Banking . . . . .	1
Journalism . . . . .	1

The scope of business courses offered in the high schools according to partial reports from 304 schools concerning their course enrollments is shown in Table 5. Some of the schools furnished figures for some courses and omitted them for others. The resulting data, however, are sufficient to show that the three courses most frequently offered and having the largest enrollments are typewriting, bookkeeping, and shorthand, with general business ranking fourth. Both in first-year typewriting and in second-year typewriting, the number of pupils enrolled exceeds the number reported for any other course. A third year of typewriting is offered in three schools, but their combined enrollments for 1947-48 totaled only 16 pupils.

TABLE 5

TOTAL BUSINESS ENROLLMENTS ACCORDING TO PARTIAL REPORTS FROM  
304 SCHOOLS, FEBRUARY, 1948

Course	No. of Schools Offering Course	No. of Schools Reporting Enrollment	No. of Pupils Enrolled
Filing . . . . .	6	5	136
Typewriting			
First-year . . . . .	297	284	12,611
Second-year . . . . .	234	228	4,814
Third-year . . . . .	3	3	16
Bookkeeping			
First-year . . . . .	204	191	4,295
Second-year . . . . .	23	17	198
Shorthand			
First-year . . . . .	214	193	3,350
Second-year . . . . .	83	74	739
General Business . . . .	132	111	3,940
Business Arithmetic . .	49	42	1,343
Business Law . . . . .	21	18	416
Distributive Education .	11	11	299
Business Correspondence .	11	10	277
Selling . . . . .	9	9	258
Economic Geography . . .	7	6	210
Business English . . . .	14	9	189
Office Practice . . . . .	12	12	148
Office Machines . . . . .	6	6	120
Clerical Practice . . . .	8	7	115
Secretarial Practice . . .	8	7	112
Consumer Economics . . . .	6	6	111
Economics-Sociology . . .	3	3	82
Cooperative Office Ed. . .	2	2	80
Journalism . . . . .	1	1	14
Banking . . . . .	1	1	5
Bus. Administration . . . .	1	1	—
<b>Total . . . . .</b>			<b>33,878</b>

An unexpected finding that three schools offered two years of instruction in shorthand with no supporting courses in typewriting was revealed in the examination of the questionnaire returns. Two of these schools indicated that shorthand is offered each year, but made no mention of typewriting.

Grade placements of the business courses are given in Table 6. One school did not indicate the grade level, and is omitted from the presentation. With the exception of general business, and in some instances first-year typewriting, the business courses were taught in the last two years of high school in more than two-thirds of the schools. First-year typewriting was placed on the two upper grade levels in 60 per cent of the schools, and on the upper three grade levels in 79 per cent of the schools. In one school, first-year typewriting was offered to eighth grade pupils, and in five schools it was made available on any grade level in the high school. Second-year typewriting was usually taught on the twelfth grade level, although several schools offered it on both the eleventh and twelfth grade levels.

Shorthand and bookkeeping were offered on the two upper grade levels in practically all the schools.

General business was offered on all grade levels, with most of the schools reporting it on the tenth grade level or in combinations which included the tenth grade. The two schools shown to offer general business on the eighth grade level are junior high schools, included in this survey because they were officially listed by the State Department of Public Instruction as offering business courses.

Since this investigation was limited to one school year, it was possible that the complete programs of offerings, particularly in the smaller high schools, would not be revealed in the information for 1947-48. Accordingly, the questionnaire called for information concerning alternate

TABLE 6

## GRADE LEVEL OF COURSES TAUGHT IN 304 SCHOOLS

Course	No. of Schools											Grade Level not stated	Total
	12	11	11-12	10 <sub>11</sub> 12	10-11	10	9 <sub>10</sub> 11	9-10	9	9-10 11-12	8		
Filing . . . . .	4		1									1	6
Typewriting													
First-year . . . . .	14	83	74	42	22	9		2	4	5	1	41	297
Second-year . . . . .	127	5	55	6	1	2	1		1	2		34	234
Third-year . . . . .	1			1								1	3
Shorthand													
First-year . . . . .	30	72	77	6	4							25	214
Second-year . . . . .	66		6									11	83
Bookkeeping													
First-year . . . . .	42	33	96	4	2	5						22	204
Second-year . . . . .	19		3							1			23
General Business . . . . .	7	6	13	18	11	41	1	7	12	4	2	10	132
Business Arithmetic . . . . .	15	2	9	4	2	9			3	1		4	49
Business Law . . . . .	8	1	7	1								4	21
Business English . . . . .	8	1	2	1								2	14
Office Practice . . . . .	8		3									1	12
Distributive Education . . . . .	4		4	2								1	11
Business Correspondence . . . . .	8		2									1	11
Selling . . . . .	6		1			1						1	9
Secretarial Practice . . . . .	6		2										8
Economic Geography . . . . .		1	2	1								3	7
Clerical Practice . . . . .	1	1	4										6
Consumer Economics . . . . .	5			1									6
Office Machines . . . . .	1	1	3									1	6
Cooperative Office Ed. . . . .	1		1										2
Banking . . . . .	1												1
Economics-Sociology . . . . .	3												3
Journalism . . . . .				1									1
Spelling . . . . .												1	1
Business Administration . . . . .												1	1

offerings. Although many of the respondents did not specify whether the courses are taught every year or in alternate years, the data in Table 7 indicate that alternating of certain offerings is the practice in some schools.

**TABLE 7**  
**BUSINESS COURSES REPORTED AS OFFERED EVERY YEAR**  
**AND IN ALTERNATE YEARS**

Course	No. of Schools Offering Courses	
	Every year	Alternate years
Filing . . . . .	4	--
Typewriting		
First-year . . . . .	232	--
Second-year . . . . .	184	1
Third-year . . . . .	1	1
Bookkeeping		
First-year . . . . .	148	29
Second-year . . . . .	15	4
Shorthand		
First-year . . . . .	144	27
Second-year . . . . .	63	4
General Business . . . . .	97	24
Business Arithmetic . . . . .	28	15
Business Law . . . . .	13	8
Business English . . . . .	8	6
Business Correspondence . . . . .	10	1
Office Practice . . . . .	10	1
Distributive Education . . . . .	9	--
Selling . . . . .	6	3
Office Machines . . . . .	5	--
Secretarial Practice . . . . .	4	2
Consumer Economics . . . . .	5	--
Economic Geography . . . . .	2	3
Clerical Practice . . . . .	1	3
Cooperative Office Education . . . . .	2	--
Economics-Sociology . . . . .	1	--
Banking . . . . .	1	--
Journalism . . . . .	1	--

Business majors were reported in 30 schools, with three schools having separate curriculums for secretarial or stenographic majors, and one school a curriculum for distributive education majors. One school reported, in addition to the stenographic curriculum, a vocational book-keeping curriculum, a vocational general clerical curriculum, and a vocational calculator curriculum, each of which leads to a proficiency certificate. Outlines of these curriculums are given in Appendix III.

The courses required of business majors are shown in Table 8. Typewriting was a requirement in each of the 30 schools. Shorthand, book-keeping, and general business were relatively high in frequency; various other business courses were named by a small number of schools. Chapter III presents the finding that filing as a separate course is offered in only six schools. Three of those schools have business majors, and require filing in the majors.

TABLE 8

## SUBJECTS REQUIRED IN 30 SCHOOLS FOR BUSINESS MAJORS

Subject	No. of Schools	Subject	No. of Schools
Filing . . . . .	3	General Business . . . . .	17
Typewriting		Business Law . . . . .	5
First-year . . . . .	30	Business Correspondence . . . . .	4
Second-year . . . . .	22	Business Arithmetic . . . . .	3
Shorthand		Business English . . . . .	3
First-year . . . . .	23	Clerical Practice . . . . .	2
Second-year . . . . .	10	Secretarial Practice . . . . .	2
Bookkeeping		Office Practice . . . . .	1
First-year . . . . .	23	Distributive Education . . . . .	1
Second-year . . . . .	10	Selling* . . . . .	1
		Office Machines . . . . .	1

\* Includes Principles of Selling and Salesmanship.

## The Business Offices

The classification of the 112 business offices included in this study follows that of the Employment Security Commission of North Carolina,<sup>16</sup> except that "Trade" in the classification for the present study is subdivided into Distributors, Wholesalers, and Retail Stores. Comparison of the distribution of types of businesses in Table 9 with the distribution for the whole state in Table 10 shows the sampling of business offices to be representative of the kinds of businesses in North Carolina. Manufacturers, with textile manufacturers in the lead, constitute the largest group in each distribution, and trade groups rank second. Furniture manufacturers, prominent in the figures for the state, were not among the manufacturing businesses represented in the membership of the National Office Management Association surveyed in this study. Hosiery manufacturers are included in the listing of business offices in Table 9 but are not given a separate category in the classification for the industries of the state shown in Table 10. The variety of the other types of manufacturing suggests that the scope of the sampling for the present study is comparable to that of the state as a whole.

The remaining classifications of industries in the state are represented in the sampling of businesses for this study. The fact that office outfitters make up a relatively large group among the business offices is explainable by the specialized membership of the National Office Management Association which was canvassed in this study. In this respect, the sampling may be overweighted.

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16. S. F. Campbell, "Influence of Industry Shown on North Carolina Population Change," Greensboro Daily News, September 19, 1948.



TABLE 9

TYPES OF BUSINESS REPRESENTED BY THE NOMA OFFICES  
COOPERATING IN THIS STUDY

<u>Manufacturers</u>		<u>Trade</u>	
Textiles, Textile Specialties . . . . .	22	<u>Distributors</u>	
Steel, Aluminum Products . . . . .	4	Petroleum Products . . . . .	6
Hosiery . . . . .	3	Groceries to Retail Stores . . . . .	2
Batteries . . . . .	1	Dairy Products . . . . .	1
Paper . . . . .	1	Electrical, Heating Appliances . . . . .	1
Tobacco and Cigarettes . . . . .	1	Rubber Products . . . . .	1
Biscuits and Crackers . . . . .	1	Welding Supplies, Equipment. . . . .	1
Business Forms . . . . .	1	Parts for Motor Trucks . . . . .	1
Supports and Braces . . . . .	1	Total . . . . .	13
Lumber . . . . .	1		
Total . . . . .	36	<u>Wholesalers</u>	
<u>Office Outfitters</u>		Dry Goods . . . . .	1
Machines and Supplies . . . . .	15	Chemicals, Laundry Supplies. . . . .	1
Printers, Stationers, Engravers. . . . .	2	Bearings and Parts . . . . .	1
Total . . . . .	17	Hardware and Seeds . . . . .	1
		Auto Supplies . . . . .	1
		Total . . . . .	5
<u>Financial &amp; Insurance Offices</u>		<u>Retail Stores</u>	
Banking . . . . .	9	Department Stores . . . . .	2
Insurance . . . . .	7	5¢ to \$1 Stores . . . . .	1
Total . . . . .	16	Total . . . . .	3
<u>Public Utilities &amp; Transportation</u>			
Utilities . . . . .	11	Total <u>Trade Organizations</u> . . . . .	21
Freight Transportation . . . . .	2		
Total . . . . .	13		
<u>Construction</u>			
Construction . . . . .	1		
<u>Miscellaneous</u>			
Meat Packers . . . . .	2		
Accountants & Auditors . . . . .	1		
Engineers & Architects . . . . .	1		
Employment Service . . . . .	1		
Tobacco Cooperative . . . . .	1		
Nonprofit Com. Organization . . . . .	1		
Trade Assn.--Credit Bureau . . . . .	1		
Total . . . . .	8		

TABLE 10

EMPLOYMENT FIGURES OF CLASSIFIED BUSINESSES IN  
NORTH CAROLINA FOR 1947\*

Industry	1947 Employment
Total Manufacture . . . . .	388,287
Textiles . . . . .	227,022
Furniture . . . . .	29,111
Tobacco Manufacture . . . . .	26,138
Food Manufacture . . . . .	17,060
Paper Products . . . . .	8,002
Electrical Machinery . . . . .	4,827
Other Machinery . . . . .	4,666
Iron & Steel (Including all nonferrous metal) . . . . .	4,516
Trade . . . . .	117,267
Construction . . . . .	36,152
Transportation, Communications and Public Utilities . . . . .	29,382
Finance, Insurance and Real Estate . . . . .	13,686
All other . . . . .	37,862

\* From figures given by S. F. Campbell in an article entitled "Influence of Industry Shown on North Carolina Population Change," Greensboro Daily News, September 19, 1948.

Of the 112 offices cooperating in this study, 37 were branch offices and 75 were head offices. The distribution in Table 11 shows all five of the NOMA chapters to have a greater number of head offices than branch offices, with the ratio of head offices to branch offices being highest in the Richmond and Raleigh chapters.

TABLE 11

NUMBER OF HEAD OFFICES AND NUMBER OF BRANCH OFFICES  
IN THE FIVE CHAPTERS OF NOMA

Chapter	No. of Offices		
	Head	Branch	Total
Charlotte, N. C. . . . .	11	9	20
Piedmont . . . . . (Greensboro, N. C.)	13	8	21
Raleigh, N. C. . . . .	11	4	15
Richmond, Va. . . . .	22	3	25
Greenville, S. C. . . . .	18	13	31
Total . . . . .	75	37	112

The offices range in size from an office conducted by one individual to an office having 485 office employees. Table 12 shows that fifty-six, or exactly half of the 112 offices, employed fewer than 30 office workers; and 93 offices had staffs of fewer than 100 employees. The largest offices were in the bracket of above 400 employees, one employing 428 and the other 485 office workers.

The total number of office employees was 6,463. Of these, 1,608, or 25 per cent were reported as performing filing duties.

TABLE 12

## SIZE OF OFFICES

No. of Employees	No. of Offices
1- 9	21
10- 19	21
20- 29	14
30- 39	10
40- 49	7
50- 59	6
60- 69	2
70- 79	5
80- 89	3
90- 99	4
100-109	2
110-119	2
120-129	1
130-139	--
140-149	--
150-159	3
160-169	--
170-179	1
180-189	--
190-199	1
200-209	1
above 200	3
212	
221	
355	
above 400	2
428	
485	
Not stated	2
<b>Total Offices included in study</b>	<b>112</b>

## CHAPTER III

### STATUS OF FILING INSTRUCTION IN NORTH CAROLINA SCHOOLS

Usable data were obtained from 305 schools, or 80 per cent of the 379 public white high schools in North Carolina which were listed by the State Department of Public Instruction as offering instruction in the business subjects. One hundred seventy-seven schools reported no filing instruction of any kind. Only six schools offered filing as a separate course. One hundred twenty-two other schools offered filing as a learning unit within one or more courses. Failure of the remaining 74 schools to respond to the questionnaire may reflect the absence of filing instruction, and perhaps the absence, also, of a felt need for filing instruction.

#### Separate Filing Courses

The six schools offering a separate course in filing ranged in size from 200 pupils with one full-time business teacher to 1,300 pupils with three full-time teachers of business subjects. The teachers in four of these schools had had formal instruction in filing; two schools did not respond to the question. In five of the six schools, additional filing instruction was offered through units within other courses. These five schools reported 136 pupils enrolled in the organized filing courses.

Three schools having a separate filing course reported business majors, and all business course offerings were required of these majors.

Equipment for pupil use in filing courses seems to have been limited to miniature filing sets, according to the data presented in Table 13, with some additional equipment and supplies available for illustrative purposes.

TABLE 13

EQUIPMENT AND SUPPLIES AVAILABLE FOR THE TEACHING OF FILING  
IN SIX SCHOOLS HAVING A SEPARATE FILING COURSE

Equipment and Supplies	No. of Mentions	
	Pupil Activities	Illustrative Purposes
<u>Equipment</u>		
Miniature filing sets . . . . .	4	1
Remington Rand . . . . .	2	
South-Western . . . . .	1	
Not Stated . . . . .	1	
Sorting tray . . . . .	3	-
Shannon, Stick, Book, for Cards, Cardboard and wire trays		
Box files . . . . .	3	1
Visible files . . . . .	1	3
Shannon files . . . . .	-	3
Vertical files . . . . .	-	2
Flat files . . . . .	-	2
Spindle files . . . . .	-	2
Bellows files . . . . .	-	1
Follow-up or tickler files . . . . .	-	1
Transfer cases . . . . .	-	1
Clip boards . . . . .	-	1
Wheeldex file . . . . .	-	1
<u>Supplies</u>		
Out Guides or Folders . . . . .	1	2
Cross Reference sheets . . . . .	1	2
Alphabetical guides . . . . .	1	1
Card guides . . . . .	1	1
Folders . . . . .	-	2
Date guides . . . . .	-	1
Labels . . . . .	-	1
Requisition slips . . . . .	-	1
Follow-up cards . . . . .	-	1

Although four schools reported the use of miniature filing sets, only two schools are shown in Table 14 to have used miniature letters, published for use with such sets. Filing manuals were reported by two schools, one of which listed two titles.

TABLE 14

## INSTRUCTIONAL MATERIALS USED IN THE SIX FILING COURSES

Materials	No. of Mentions	
	Pupil Activities	Illustrative Purposes
Cards . . . . .	2	--
Paper cut in card size . . . . .	2	--
Miniature letters . . . . .	2	--
Remington Rand . . . . .	1	
South-Western . . . . .	1	
Standard-size letters . . . . .	2	--
Carbon copies of letters		
Teacher-prepared materials . . . . .	1	1
Copied from unit on filing in general business textbook . . . . .		
Business Papers . . . . .	--	1
From bookkeeping practice sets		
Job Sheets . . . . .	1	--
Filing Manuals . . . . .	2	--
<u>Progressive Filing</u> (Remington Rand)		
<u>Clerical Practice</u> (Rowe)		
<u>Business Filing</u> (South-Western)		

Instruction in alphabetic, subject, and geographic methods of filing was reported for all courses, but pupil activity was not always provided, as is shown in Table 15. Numeric and chronologic methods of filing and the procedures of cross referencing, indexing, and coding were included in most but not all of the six filing courses, and tended to be presented as discussion rather than activity learning. The systems in

which instruction was given were stated by only one of the six schools. That school included instruction in the Direct Name, Soundex, and Triple Check systems of filing.

TABLE 15

## METHODS AND SPECIAL ACTIVITIES TAUGHT IN THE SIX FILING COURSES

Methods & Special Activities	No. of Mentions	
	Pupil Activities	Discussion only
Alphabetic . . . . .	6	-
Subject . . . . .	5	1
Geographic . . . . .	5	1
Numeric . . . . .	3	2
Chronologic . . . . .	4	1
Cross Referencing . . . . .	3	3
Indexing . . . . .	3	2
Coding . . . . .	2	2

All six schools measured pupil achievement in filing, as shown in Table 16. Five of the six schools used teacher-constructed tests, and four tested by requiring performance of the filing processes.

TABLE 16

## MEASURES OF PUPIL ACHIEVEMENT IN THE SIX FILING COURSES

Measure of Achievement	Frequency
Teacher-constructed tests . . . . .	5
Performance tests . . . . .	4
Statement of the rules . . . . .	3
Published tests to accompany text . . . . .	2
Standardized tests . . . . .	1



Marked differences were noted in the time allotted to the filing courses and in the reported adequacy of these courses. For example, School A of Table 17 considered six weeks adequate, with additional filing in the other subjects. The course in School C extended through a school year and additional instruction was given in other subjects, yet this school recommended an increased time allotment. Both School A and School C reported that they make follow-up studies of their graduates each year. This could mean that the school checked merely on the location of its graduates each year since the follow-up study in neither School A nor School C provided any information about the filing duties performed on the job.

Schools A and C were comparable in total pupil enrollment, in number of pupils taking the business subjects, and in number of pupils enrolled in filing courses. School A had one full-time and one part-time business teacher, and School C had one full-time business teacher. Offerings in business courses in the two schools were similar except for business correspondence, business law, and principles of selling in School A, and clerical practice in School C. However, the heavy teaching schedule reported by School C gives rise to a question as to how the filing course was administered throughout the 36-week period. Perhaps multiple courses, with identical pupil personnel, were scheduled at the same time, since the figures recorded for different courses were found to be duplicates in pupil enrollment, grade level, and number of weeks of instruction. It is possible, too, that the office machines course, with only two pupils enrolled, was administered as a part of or combined with a related course.

School A, with the shorter course, included instruction in all five methods and cross referencing, indexing, and coding; and, in addition, the pupils were given an opportunity to apply their filing knowledge in the school office. School C reported more types of filing supplies, but

limited its filing instruction to alphabetic, subject, and geographic methods, with no instruction in numeric or chronologic filing, or in indexing and coding.

TABLE 17

## COMPARATIVE DATA ON SCHOOLS A AND C

Enrollment and Offerings	School A	School C
Total Enrollment . . . . .	200	200
No. of Business Pupils		
in one business subject . . . . .	40	31
in two or more bus. subjects . . . . .	40	40
No. of pupils enrolled in filing . . . . .	30	30
No. of business teachers		
Full-time . . . . .	1	1
Part-time . . . . .	1	--
Courses Offered:		
First-year Bookkeeping . . . . .	1 yr.	1 yr.
Second-year Bookkeeping . . . . .	1 yr.	----
Business Correspondence . . . . .	1 yr.	----
Business Law . . . . .	1 sem.	----
Clerical Practice . . . . .	----	1 yr.
Filing . . . . .	6 wks.	1 yr.
Office Machines . . . . .	1 sem.	1 yr.
Principles of Selling . . . . .	1 sem.	----
First-year Shorthand . . . . .	1 yr.	1 yr.
Second-year Shorthand . . . . .	1 yr.	1 yr.
First-year Typewriting . . . . .	1 yr.	1 yr.
Second-year Typewriting . . . . .	1 yr.	1 yr.
Additional Filing Instruction:		
Clerical Practice . . . . .	----	8 wks.
Business Correspondence . . . . .	6 wks.	----

## Filing Units Within Other Courses

Courses in Which Filing Is Included

One hundred twenty-two schools reported giving some filing instruction as a unit in one or more business courses. General business, according to the data shown in Table 18, led in frequency of the courses containing a filing unit. Of the 84 schools offering general business, 73 provided some filing instruction. A unit on filing is specified as a part of the general business course in the revised Curriculum Guide and Courses of Study issued in 1947, and filing units are included in the content of the state-adopted textbook and in the previously adopted textbook, which might have been in use by some of the schools at the time of the survey. It is possible that the 11 schools offering general business but not including a filing unit were using a textbook other than the state-adopted text, or had modified the content of the general business course in considering the total program. Four of these eleven schools offered a business practice course in which filing was included. Two other schools of the eleven having a general business course in which filing was not included offered filing in the first and second year of typewriting; two placed the filing unit in the second year of shorthand.

It will be noted from Table 18 that although few of the schools offered courses of applied practice, such as secretarial practice, clerical practice, and office machines, filing instruction was included in each of these courses.

Filing was found to be included in various other courses also, and some schools included filing units in more than one course. Thus, for individual pupils, the instruction in filing might be extended or duplicated in particular combinations of courses selected.

TABLE 18

COURSES IN WHICH FILING WAS INCLUDED AS A LEARNING UNIT  
IN 122 SCHOOLS

Course	No. of Mentions	No. Schools Offering Course
General Business . . . . .	73	84
Typewriting		
First-year . . . . .	23	119
Second-year . . . . .	29	96
Year not specified . . . . .	2	--
Shorthand		
First-year . . . . .	11	94
Second-year . . . . .	11	38
Bookkeeping		
First-year . . . . .	1	90
Second-year . . . . .	1	11
Year not specified . . . . .	15	--
Business Arithmetic . . . . .	5	25
Business English & Correspondence	4	17
Library Science . . . . .	2	1
Distributive Education . . . . .	1	7
Business Administration . . . . .	1	1
Practice Courses		
Office Practice . . . . .	8	8
Secretarial Practice . . . . .	6	6
Clerical Practice . . . . .	5	5
Office Machines . . . . .	3	3

### Length of Time Devoted to Filing

From five to ten class periods were given to filing instruction in the majority of the schools, according to Table 19. Table 20 shows that the 50-minute and the 60-minute class period prevailed, with the 60-minute period having the highest frequency. With two exceptions (one school with 43-minute periods and one with 70-minute periods), all schools reported class periods within the range of from 45 to 60 minutes. Only 98 of the 122 schools furnished data from which Table 21 could be compiled to show the amount of time devoted to filing instruction. The obtained clock-hours for total time allotted to filing ranged from less than two hours in two schools to more than 38 clock-hours in four schools.

### Opinions Regarding Increase of Time for Filing Instruction

The teachers were asked to express their opinion as to whether teaching time for filing should be increased. Eighty-nine respondents did not indicate a desire for an increased time allotment for the filing units. Thirty-three respondents wanted the time increased. Most of these were devoting from 8 clock hours to 13 clock hours to filing. In addition to increased time for filing instruction, some respondents wanted more equipment, more teachers, and more materials. One wanted a workable plan for fitting a filing course into an already crowded pupil schedule of required courses. One teacher, whose time would not permit the addition of another course, nevertheless expressed a wish for a separate nine-month course instead of only a filing unit within the office practice course.

### Equipment, Supplies, and Learning Materials Available

The data concerning equipment and supplies, presented in Table 22, were furnished by the respondents in 52 schools. Forty-four schools provided the data for instructional materials shown in Table 23. The

TABLE 19

NUMBER OF CLASS PERIODS DEVOTED TO FILING UNITS WITHIN VARIOUS COURSES IN 104 SCHOOLS

No. of Class Periods	No. of Schools															Total		
	Gen. Bus.	Typewr.		Bkbp.	Shhd.		Sec. Prac.	Off. Prac.	Bus.Cler.Off.		Bus. Eng.	Lib. Sci.	D. E.	Bus. Cor.	Bus. Adm.			
		1st yr.	2nd yr.	1st yr.	1st yr.	2nd yr.			Ar.	Prac.	Mach.							
35-36	1		1								1						3	
33-34																	—	
31-32																	—	
29-30						1	2	1							1		5	
27-28																	—	
25-26																	2	
23-24			1			1											—	
21-22																	8	
19-20				2		1	2	1		2							1	
17-18						1											8	
15-16	2		2	1				1			2						2	
13-14	1		1										1				5	
11-12		1	1		1					1			1				34	
9-10	21		4	2	2	1	1	1		1				1			11	
7-8	9				1					1							50	
5-6	24	9	7	2	1	2	1			2			1		1		15	
3-4	1	3	5	1	3	2											16	
1-2	2	5	4	3	1					1							1	
no ans.																	1	
Total	61*	18	26	11**	9	9	6	4	4	3	2	2	2	1	1	1	1	161

\* In addition to this number, 6 stated "duration of one chapter."  
 \*\* In addition to this number, 2 stated "with practice sets."

TABLE 20

## LENGTH OF CLASS PERIODS IN WHICH FILING WAS TAUGHT IN 108 SCHOOLS

Length of Time in Minutes	No. of Schools																Total		
	Gen. Bus.	Typewr.		Bkdp.	Shhd.		Off. Prac.	Sec. Prac.	Cler. Prac.	Off. Mach.	Bus. Ar.	Bus. Cor.	Bus. Eng.	Bus. Prac.	Lib. Sci.	Bus. Adm.		D. E.	
		1st yr.	2nd yr.	1st yr.	1st yr.	2nd yr.													
43							1											1	
45	11	2	3	1	2	1	1		1		1	1	1				1	no ans.	27
50	22	2	4	2	2	3	1	1	3		1		1		1				43
55	10	2	4	2	1	1	1			1		1		1					24
57	3				1			1											5
60	21	11	13	6	2	4	3	4		1	1								66
70	1																		1
Total	68	17	24	11	8	9	7	6	4	2	3	2	2	1	1	1	1	1	167

TABLE 21

TOTAL CLOCK HOURS DEVOTED TO FILING UNITS WITHIN  
ALL COURSES IN 98 SCHOOLS

Time in Clock Hrs.*	No. of Schools
More than 38 hours . . . . .	4
35-37 . . . . .	1
32-34 . . . . .	-
29-31 . . . . .	4
26-28 . . . . .	3
23-25 . . . . .	2
20-22 . . . . .	5
17-19 . . . . .	3
14-16 . . . . .	7
11-13 . . . . .	8
8-10 . . . . .	23
5- 7 . . . . .	19
2- 4 . . . . .	17
Less than 2 hours . . . . .	2
<hr/>	
Total Schools . . . . .	98

\* Upper limit of each class interval includes the additional minutes through 59.



TABLE 22

**EQUIPMENT AND SUPPLIES AVAILABLE FOR THE TEACHING OF FILING  
IN 52 SCHOOLS HAVING FILING UNITS WITHIN OTHER SUBJECT  
MATTER COURSES**

Equipment and Supplies	No. of Schools	
	Pupil Activities	Illustrative Purposes
<u>Equipment</u>		
Vertical files . . . . .	18	21
Box files . . . . .	9	18
Miniature filing sets . . . . .	18	1
Bellows files . . . . .	2	15
Visible files . . . . .	4	9
Flat files . . . . .	1	8
Follow-up or tickler files . . . . .	3	6
Sorting trays . . . . .	4	2
Transfer cases . . . . .	1	4
Wheeldex files . . . . .	1	3
Statement posting trays . . . . .	1	—
Spindle files . . . . .	3	15
Shannon files . . . . .	2	12
<u>Supplies</u>		
Folders . . . . .	17	18
Alphabetic guides . . . . .	16	15
Cross Reference Sheets . . . . .	11	3
Card Guides . . . . .	7	5
Date Guides . . . . .	7	3
Requisition Slips . . . . .	5	3
Out Guides or Folders . . . . .	4	4
Labels . . . . .	4	4
Follow-up Cards . . . . .	4	3
Substitution Cards . . . . .	3	4

other schools did not state what equipment was available. It is obvious from these tables that there was a scarcity of equipment and materials for the pupils to get experience in filing activity. The equipment in the 52 schools included 39 vertical files, only 18 of which were used by the pupils. Twenty-seven schools reported the use of box files. Thirty-five schools reported the use of folders, and 31 schools the use of alphabetic guides. Nineteen schools reported the use of miniature filing sets, but only 14 schools reported the use of miniature letters.

TABLE 23

## INSTRUCTIONAL MATERIALS USED IN FILING UNITS IN 44 SCHOOLS

Materials	No. of Schools	
	Pupil Activities	Illustrative Purposes
Cards . . . . .	29	4
Paper cut in card size . . . . .	21	2
Printed miniature letters . . . . .	13	1
South-Western Publishing Co. . . . .	8	
Remington Rand . . . . .	3	
The H. M. Rowe Co. . . . .	2	
Standard-size letters . . . . .	12	2
Business papers . . . . .	9	1
Teacher-prepared materials . . . . .	6	2
Filing Manuals . . . . .	13	1
Job Sheets . . . . .	2	-
Others . . . . .	5	-

The meager data reported on instructional materials in Table 23 show that cards and paper cut in card size were the materials most often used in filing units. Other instructional materials included miniature letters published for school purposes, used by pupils in 14 of the 44 schools and for illustrative purposes in one school. Standard-size letters were in use in 12 schools for pupil activities, and in 2 schools

for illustrative purposes. Business papers were used by pupils in 9 schools, and were available for demonstration in one other school.

Teacher-prepared materials were reported by 8 schools. These materials were gathered from a number of sources, and consisted of letters or carbon copies of letters typed in the classroom, correspondence of various clubs, business letters and business papers obtained from local firms and from the school, library materials, papers provided in the general business workbook, and a collection of papers saved specifically for use in teaching filing. Job sheets were used in two schools. In one of these schools the job sheets were the same as those used in the clerical practice course.

Thirteen schools reported the use of a filing manual for pupil activities, and one reported use of a manual for illustrative purposes only. The filing manuals are specialized texts giving the rules governing the various methods and systems of filing, and problems for the application of these rules. These manuals and other references cited by the respondents are listed in Appendix III.

#### Filing Methods Taught

Five methods--the alphabetic, subject, **numeric**, geographic, and chronologic--and three special activities--coding, indexing, and cross referencing--were listed on the questionnaire. No other methods or special activities were added by the respondents. Of the 122 schools in this group, only 41 supplied information about the filing methods in which instruction was given. Table 24 shows that all 41 schools provided pupil activity in the alphabetic method. One school reported instruction in no other method. Numeric filing was presented in 40 schools, but was limited to discussion in 21 of the schools. The various combinations of

TABLE 24

## METHODS AND SPECIAL ACTIVITIES IN THE FILING UNITS

Methods & Special Activities	No. of Schools	
	Pupil Activities	Discussion only
Alphabetic . . . . .	41	--
Numeric . . . . .	19	21
Subject . . . . .	23	16
Geographic . . . . .	18	18
Chronologic . . . . .	12	17
Indexing . . . . .	27	11
Cross Referencing . . . . .	18	10
Coding . . . . .	9	10
Others . . . . .	1	--
Rapid Finding . . . . .	1	

the several methods with the alphabetic method are shown in Table 25. Twenty-one schools reported instruction in all five methods of filing.

Thirty-eight schools offered instruction in indexing, and one school specified that rapid finding was emphasized in pupil activities. There were three schools that provided no pupil activity in filing.

TABLE 25

## METHODS OF FILING TAUGHT IN ADDITION TO ALPHABETIC METHOD

Method	No. of Schools
Numeric, Subject, and Geographic . . . . .	10
Numeric, Subject, and Chronologic . . . . .	2
Numeric, Geographic, and Chronologic . . . . .	1
Numeric and Subject . . . . .	2
Numeric and Geographic . . . . .	1
Subject and Chronologic . . . . .	1
Chronologic . . . . .	1
Geographic . . . . .	1

### Measurement of Achievement

Only 43 of the 122 schools reported measurement of pupil achievement in the units on filing; the remaining 79 failed to respond on this matter. Measurement of pupil achievement was not limited to a particular type, but 40 of the schools used teacher-constructed tests, as shown in Table 26. Performance tests were reported in use in 29 schools. Certificates of proficiency were awarded in only three schools in the group. The remaining 40 respondents stated that their schools gave no certificates.

One of the three schools awarding proficiency certificates included the filing unit in one-half of each of twenty-five 60-minute periods of instruction in second-year shorthand. This school used miniature filing sets. Instruction in all methods was given, but only the Dewey Decimal system was used by the pupils. Pupils worked in the principal's office. Awards were made on the basis of published tests accompanying the textbook (Rowe) and the miniature sets.

A second school provided filing instruction in five periods of general business and in 20 periods of clerical practice. All methods and special activities were included in the instruction, with special attention given to the activity of rapid finding. Variadex was the only system checked. Miniature filing sets were used. No outside application of filing was provided. The 20-period Remington Rand certificate was awarded.

The third school awarding a proficiency certificate reported one 60-minute period devoted to filing instruction in each of the following courses: first-year and second-year bookkeeping, business English, clerical practice, office machines, office practice, first-year and second-year shorthand, and first-year and second-year typewriting. Each of these courses is offered each year with the exception of business English, and, according

TABLE 26

MEASURES OF PUPIL ACHIEVEMENT IN LEARNING UNITS  
ON FILING IN 43 SCHOOLS

Measure	Frequency of Mention
Teacher-constructed tests . . . . .	40
Performance tests . . . . .	29
Statement of the rules . . . . .	20
Published tests to accompany text . . . . .	19
Standardized tests . . . . .	1
Others . . . . .	3

to the information furnished, is taught by one part-time teacher of business subjects. No miniature files were reported. Information was not supplied by this school about the nature of the certification.

Provision for Application of Filing Knowledge

Nineteen schools provided experience for the pupils in which their filing knowledge was applied in outside activities. Twenty-eight respondents stated that no provision was made for such experience, and the other 75 respondents omitted the question. Table 27 shows the most common provision to be that of assisting in the school office. No indication was given as to whether all the pupils receiving filing information could assist in the office, or whether this opportunity was limited to selected pupils.

Systems of Filing Used

The questionnaire listed 24 systems of filing, defined and explained in filing manuals and textbooks. Few respondents filled in this section of the check list. Table 28 shows the systems that were reported by 22 schools. The 17 schools reporting the Dewey Decimal system included instruction in all five methods, and in indexing, coding, and cross

TABLE 27

PROVISION FOR APPLICATION OF FILING KNOWLEDGE TO OFFICE  
PROBLEMS

Position	No. of Schools
Assist in the office . . . . .	10
Assist in office and library . . . . .	2
Work in Cooperative work-school program . . . . .	2
File library cards . . . . .	1
Check 5-6 arrangements of office files . . . . .	1
File classwork papers . . . . .	1
Set up files for teaching materials . . . . .	1
Nature not stated . . . . .	1
<b>Total . . . . .</b>	<b>19</b>

referencing. Two schools reported the use of no other system. One school presented seven systems in addition to the Dewey Decimal; all filing instruction in this school was given in five weeks in second-year shorthand. One school reported two other systems in filing, with the Dewey Decimal system taught by the English teacher. Dewey Decimal is a highly specialized system from the standpoint of activities in classifying for filing. Inasmuch as these schools reported a relatively short period of time for filing instruction and provided no information about the equipment and supplies available for teaching filing, it is possible that instruction in Dewey Decimal was limited to library orientation and information about the Dewey Decimal system.

Comparison of Schools Offering Filing and Schools not Offering  
Filing

Comparison of the 177 schools which offered no filing instruction of any kind with the schools offering filing units reveals no outstanding differences in total high school enrollments and pupil enrollments for one and for two or more business courses. Tables 29, 30, and 31 furnish

TABLE 28

SYSTEMS REPORTED IN SCHOOLS TEACHING FILING AS A LEARNING  
UNIT ONLY

System	No. of Schools	
	Pupil Activities	Discussion only
Dewey Decimal . . . . .	11	6
Direct Name . . . . .	6	2
Variadex . . . . .	4	1
Numeric Check . . . . .	2	1
Triple Check . . . . .	1	2
Soundex . . . . .	--	2
Automatic Index . . . . .	1	-
Library Bureau Direct Alphabetic Index . . . . .	1	-
<b>Safeguard</b> . . . . .	1	-
Skyline or Direct Vision . . . . .	--	1
Duplex-Numeric . . . . .	1	-
Kardex . . . . .	--	1
<b>Expandex</b> . . . . .	--	1
Wheeldex . . . . .	--	1

comparative data on these two groups of schools. More than three-fifths of the schools offering a learning unit in filing and three-fourths of those offering no filing instruction had fewer than 300 high school pupils enrolled. Approximately three-fourths of both groups of schools had fewer than 90 pupils enrolled in one business course only, and approximately three-fourths of both groups had fewer than 50 pupils enrolled in two or more business courses. Among the schools with only one business teacher, noted in Table 32, there was a greater proportion of departments staffed by part-time teachers in the group of schools offering no filing instruction. The data of this table are, in general, suggestive of association between the size of teaching staff and the offering of filing units. Yet the fact that filing was offered in 16 schools having no business teachers other than a part-time teacher indicates that filing instruction can be provided by a minimal teaching staff.



TABLE 29

PUPIL ENROLLMENT IN 122 SCHOOLS OFFERING FILING UNITS AND  
IN 177 SCHOOLS OFFERING NO FILING INSTRUCTION

No. Pupils Enrolled in School	No. of Schools	
	Learning Unit	No Filing
1- 49	1	--
50- 99	12	27
100- 149	21	34
150- 199	19	35
200- 249	13	23
250- 299	12	14
300- 349	5	5
350- 399	4	5
400- 449	5	4
450- 499	4	2
500- 549	3	2
550- 599	1	--
600- 649	2	2
650- 699	1	2
700- 749	2	--
750- 799	1	2
800- 849	--	--
850- 899	--	1
900- 949	1	1
950- 999	2	--
1000-1049	--	1
1050-1099	1	--
1100-1149	1	--
1150-1199	--	--
1200-1249	1	--
1250-1299	--	--
1300-1349	--	--
1350-1399	--	1
1400-1449	--	--
. . . . .		
. . . . .		
1900-1949	1	--
Not stated	9	16
Total number of schools	122	177

TABLE 30

DISTRIBUTION OF 122 SCHOOLS OFFERING FILING UNITS AND  
177 SCHOOLS OFFERING NO FILING, ACCORDING TO THE  
NUMBER OF PUPILS ENROLLED IN ONE BUSINESS  
COURSE

No. of Pupils Enrolled in One Business Course	No. of Schools	
	Learning Unit	No Filing
1- 14	10	14
15- 29	19	46
30- 44	18	34
45- 59	16	27
60- 74	11	18
75- 89	12	9
90-104	8	--
105-119	1	1
120-134	--	3
135-149	3	1
150-164	3	2
165-179	2	--
180-194	1	2
195-209	--	--
210-224	--	2
225-239	--	--
240-254	--	--
255-269	1	--
270-289	1	--
. . . .		
. . . .		
460-474	1	--
475-489	1	--
Not stated	14	18
Total number of schools	122	177

TABLE 31

DISTRIBUTION OF 122 SCHOOLS OFFERING FILING UNITS  
AND 177 SCHOOLS OFFERING NO FILING, ACCORDING  
TO NUMBER OF PUPILS ENROLLED IN TWO OR  
MORE BUSINESS COURSES

No. of Pupils Enrolled in Two or More Business Courses	No. of Schools	
	Learning Unit	No Filing
None	7	18
1- 9	12	32
10- 19	29	38
20- 29	13	23
30- 39	10	14
40- 49	12	11
50- 59	4	4
60- 69	7	1
70- 79	1	3
80- 89	2	1
90- 99	1	2
100-109	2	1
110-119	--	2
120-129	1	--
130-139	--	--
140-149	--	--
150-159	--	1
160-169	--	--
170-179	1	--
180-189	1	--
190-199	--	--
200-209	2	1
. . . . .		
. . . . .		
210-219	1	--
Not stated	16	25
<hr/>		
Total number of schools	122	177

TABLE 32

FULL-TIME AND PART-TIME TEACHERS OF BUSINESS SUBJECTS IN THE  
122 SCHOOLS OFFERING FILING UNITS AND IN THE 177 SCHOOLS  
OFFERING NO FILING INSTRUCTION

No. of Teachers in Bus. Dept.	No. of Schools		No. of Business Teachers			
	Learning Unit	No Filing	Learning Unit		No Filing	
			Full time	Part time	Full time	Part time
1	77	134	60	16	98	36
2	28	36	31	29	29	43
3	10	5	15	12	9	9
4	4	2	12	4	3	5
5	1	--	2	3	--	--
6	1	--	4	2	--	--
7	--	--	--	--	--	--
8	--	--	--	--	--	--
9	1	--	7	2	--	--
Total	122	177	131	68	139	93

It is apparent from Table 33 that there were teachers who had had formal instruction in filing teaching in the schools offering no filing instruction, and from Table 34 that some teachers of courses which included filing units were not certified in the business subjects. As shown in Table 33, more of the courses in the schools having filing units were taught by teachers who had had formal instruction in filing. Table 34 shows that more of the courses in the schools having filing instruction were taught by teachers certified in the business subjects.

TABLE 33

COURSES TAUGHT BY TEACHERS HAVING HAD FORMAL INSTRUCTION IN FILING  
IN SCHOOLS WITH FILING UNITS AND IN THE SCHOOLS OFFERING NO  
FILING INSTRUCTION

Course	No. of Mentions	
	Learning Unit	No Filing
First-year Typewriting . . . . .	65	47
First-year Shorthand . . . . .	56	35
First-year Bookkeeping . . . . .	48	23
General Business . . . . .	40	7
Practice Courses:		
Secretarial Practice . . . . .	7	--
Office Practice . . . . .	5	--
Clerical Practice . . . . .	4	--
Office Machines . . . . .	2	--
Business Arithmetic . . . . .	8	2
Business Correspondence . . . . .	4	--
Business English . . . . .	3	--
Business Law . . . . .	3	--
Consumer Economics . . . . .	2	--
Economic Geography . . . . .	1	--
Principles of Selling . . . . .	1	--
Banking . . . . .	1	--
Journalism . . . . .	1	--

TABLE 34

COURSES TAUGHT BY TEACHERS NOT CERTIFIED IN BUSINESS COURSES  
IN SCHOOLS OFFERING FILING UNITS AND IN THE SCHOOLS  
OFFERING NO FILING INSTRUCTION

Course	No. of Mentions	
	Learning Unit	No Filing
First-year Typewriting . . . . .	16	28
General Business . . . . .	22	16
Business Arithmetic . . . . .	10	7
First-year Bookkeeping . . . . .	5	8
First-year Shorthand . . . . .	5	6
Business English . . . . .	4	2
Business Law . . . . .	2	4
Economic Geography . . . . .	2	1
Economics . . . . .	1	2
Consumer Economics . . . . .	1	1
Business Correspondence . . . . .	1	--
Distributive Education . . . . .	1	--
Office Practice . . . . .	1	--
Business Administration . . . . .	1	1
Spelling . . . . .	--	1

The course offerings in the two groups of schools were similar, as shown in Table 35, with typewriting, shorthand, bookkeeping, and general business most frequently offered in each group.

Attention has been called earlier to the fact that filing is an established part of the content of general business, in textbooks and in the state course of study (see page 33). It was shown in Table 18 that only 73 courses in general business included filing units. This figure, considered in relation to the total of 129 schools recorded in Table 35 as offering general business, reveals that only 56.6 per cent of the general business courses included instruction in filing.

It will be noted also in Table 35 that there were 24 practice courses exclusive of office machines. These are vocational business courses in which filing might be expected to be an essential part of office procedures. Five of these courses, however, are shown in the table to include no filing instruction. Three office machines courses included filing; one did not.

Courses required for the business majors in the 27 schools having a prescribed major<sup>17</sup> are shown in Table 36. Twenty-eight practice courses were offered, but only five were requirements of the business majors. Each of these five courses included instruction in filing. Five practice courses were reported in the course offerings in the schools without filing instruction, none of which were required of the business majors. All 22 of the practice courses in the group of schools offering filing units included filing instruction. It will be noted that, although three of the office practice courses included a filing unit, only one such course was required of the business majors. No pattern for business majors is revealed in the

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17. The other three schools having a business major were treated on page 27 in the section pertaining to a separate filing course.

TABLE 35

BUSINESS COURSES OFFERED IN 122 SCHOOLS OFFERING FILING UNITS  
AND IN 177 SCHOOLS OFFERING NO FILING INSTRUCTION

Course	No. of Schools	
	Learning Unit	No Filing
Typewriting		
First-year . . . . .	119	172
Second-year . . . . .	96	132
Third-year . . . . .	---	3
Shorthand		
First-year . . . . .	94	114
Second-year . . . . .	38	40
Bookkeeping		
First-year . . . . .	90	108
Second-year . . . . .	11	8
General Business . . . . .	84	45
Business Arithmetic . . . . .	25	23
Business Law . . . . .	8	9
Business English . . . . .	8	5
Practice Courses		
Office Practice . . . . .	8	3
Secretarial Practice . . . . .	6	2
Clerical Practice . . . . .	5	---
Office Machines . . . . .	3	1
Distributive Education . . . . .	7	3
Business Correspondence . . . . .	9	---
Selling . . . . .	5	2
Consumer Economics . . . . .	4	2
Cooperative Office Education . . . . .	2	---
Banking . . . . .	---	1
Economics-Sociology . . . . .	1	2
Journalism . . . . .	1	---
Spelling . . . . .	---	1

requirements shown in Table 36 other than that the relative frequencies of offerings are similar. The data are suggestive of considerable variation in the scope of requirements. A third of the schools having majors provided no filing in any course offerings.

TABLE 36

COURSES REQUIRED FOR BUSINESS MAJORS IN 18 SCHOOLS OFFERING FILING UNITS AND IN 9 SCHOOLS OFFERING NO FILING INSTRUCTION

Course	No. of Schools		
	Learning Unit	No Filing	Containing Unit*
Typewriting			
First-year . . . . .	18	9	3
Second-year . . . . .	11	9	5
Shorthand			
First-year . . . . .	17	4	1
Second-year . . . . .	7	1	2
Bookkeeping			
First-year . . . . .	14	6	5
Second-year . . . . .	7	-	-
General Business . . . . .	14	1	11
Practice Courses			
Clerical Practice . . . . .	2	-	2
Secretarial Practice . . . . .	2	-	2
Office Practice . . . . .	1	-	3
Business Correspondence . . . . .	3	-	3
Business Law . . . . .	2	-	-
Business English . . . . .	2	-	1
Business Arithmetic . . . . .	2	-	1
Distributive Education . . . . .	1	-	-

\* Courses in which filing units were included.

#### Opinions on Desirability of Including Filing Instruction

The opinions from schools relative to the desirability of including filing as a separate course and as a unit within a course were sought on the questionnaire to the schools. Although questions about the desirability of offering filing were not directed to schools where filing is taught, some



of the respondents from these schools gave opinions. These opinions are included in the tabulations. The data of Table 37 show the number of schools desiring a separate filing course, and Table 38 the number of schools desiring a learning unit of filing. Of the 299 schools included here, 157 wanted a separate filing course, and 138 favored a learning unit. These expressed opinions indicate that a majority of the respondents from the schools felt that filing instruction has a place in the business curriculum. In contrast, Table 39 shows that 99 schools are opposed to including filing instruction in the business curriculum. Attention should be called to the fact, however, that one respondent of the 33 voting against a unit includes such a unit of instruction in the existing curriculum. Twelve voted against having either a course or a unit, with some commenting that it was impracticable to offer either.

Some of the cited handicaps to achieving more filing instruction were: lack of equipment for pupil activity, lack of pupil time for scheduling other than the required courses, and lack of teacher time because of heavy teaching schedules.

Recommendations about courses appropriate for filing units were supplied by 97 schools which offer no filing instruction. Some teachers mentioned more than one course, including in some instances courses which were not given in their schools. Table 40 shows that 43 teachers preferred typewriting as a course for including a filing unit. A total of 33 teachers indicated a preference for the various practice courses, but only 5 of these schools offered a practice course. General business, bookkeeping, and shorthand received a sufficient number of mentions to indicate that the teachers considered these courses suitable for the filing units.

TABLE 37

## OPINIONS FROM SCHOOLS FAVORING A SEPARATE FILING COURSE

Response	No. of Schools
Those offering no filing instruction . . . . .	109
Those offering a unit but preferring a course instead of a unit, or a course in addition to the unit . . . . .	48
Total number of opinions . . . . .	157

TABLE 38

## OPINIONS FROM SCHOOLS FAVORING A LEARNING UNIT OF FILING INSTRUCTION

Response	No. of Schools
Those offering no filing instruction . . . . .	104
Those offering unit and satisfied with unit . . . . .	34
Total number of opinions . . . . .	138

TABLE 39

## OPINIONS FROM SCHOOLS NOT FAVORING FILING INSTRUCTION

Response	No. of Schools
Against course . . . . .	54
Against unit . . . . .	33*
Against any filing . . . . .	12
Total number of opinions . . . . .	99

\* Includes one school already offering a filing unit.

TABLE 40

COURSES RECOMMENDED FOR INCLUSION OF FILING INSTRUCTION  
BY 97 SCHOOLS OFFERING NO FILING INSTRUCTION

Course	No. of Mentions
Typewriting . . . . .	43
First-year . . . . .	1
Second-year . . . . .	10
Year not specified . . . . .	32
Practice Courses . . . . .	33
Office Practice . . . . .	18
Secretarial Practice . . . . .	11
Clerical Practice . . . . .	3
Secretarial Training . . . . .	1
General Business . . . . .	20
Bookkeeping . . . . .	20
Shorthand . . . . .	12
Second-year . . . . .	4
Year not specified . . . . .	8
Business Correspondence . . . . .	3
Office Management . . . . .	1
Business Arithmetic . . . . .	1
Consumer Economics . . . . .	1
English . . . . .	1
Library . . . . .	1
Any general course . . . . .	1
In all business courses . . . . .	1

## CHAPTER IV

### FILING ACTIVITIES IN THE BUSINESS OFFICES

This chapter presents information concerning filing in the business offices: number of file clerks, methods and systems of filing used in the offices, and opinions of businessmen concerning the training of clerical workers having filing duties.

#### Office Employees Performing Filing Duties

The data presented here are from 112 business offices with a total of 6,463 office employees, of whom 1,608, or 25 per cent, performed some filing duties. These figures include 24 supervisors who did filing, in addition to other supervisory duties. Two hundred twenty-six, or only 3.5 per cent of the total number of office workers, were classified by their offices as file clerks; and these file clerks were reported in only 50 of the 112 offices. Tables 41 and 42 give the distribution of offices according to the number of workers who did filing and according to the number of file clerks.

In the 21 offices having 9 or fewer workers, filing duties were performed by approximately 59 per cent of the office employees. In 7 offices, employing from 1 to 5 office employees, filing duties were performed by each employee. In the same group of offices, only 5 offices reported file clerks, but in those offices, 25 per cent of the total office employees were classified as file clerks.

Twenty-four per cent of the workers in the 10 offices reporting from 30 to 39 office employees performed filing duties, however; only one

TABLE 41  
DISTRIBUTION OF OFFICES ACCORDING TO NUMBER OF EMPLOYEES  
DOING FILING WORK

No. of Employees Doing Filing	No. of Offices
1- 4	45
5- 9	27
10-14	16
15-19	6
20-24	5
25-29	1
30-34	3
35-39	1
above 50:	
50	1
60	1
100	2
125	2
225	1
Not stated	1
Total number of offices	112

of the ten offices reported an employee classified as a file clerk.

The office reporting 43 file clerks (Table 43) was a large life insurance company having a total of 428 office employees, 100 of whom performed filing duties. The proportion of workers performing filing duties is 23 per cent, approximately the same as for the entire group, but the proportion of file clerks (10 per cent) is higher than the percentage obtained for the entire group.

Thirty-one offices reported a supervisor in charge of the files, as shown in Table 43. With one exception, no office reported more than one supervisor, and that office reported a supervisor in charge of each section of the files. The total number of supervisors, therefore,

exceeded 31, but since the number of file sections having supervisors was not stated, the exact number is not known. Table 44 shows that 24 of the 31 supervisors had some filing duties. Table 45 lists the other duties of all supervisors. These duties include, in matters pertaining to filing, the setting up of filing systems, the supervision of other file clerks, the checking of proper distribution of materials, and the general supervision of the filing department.

TABLE 42

## DISTRIBUTION OF OFFICES ACCORDING TO NUMBER OF FILE CLERKS

No. of File Clerks	No. of Offices
None	62
1	19
2	13
3	4
4	4
5	2
6	--
7	--
8	--
9	1
10	2
11	1
12	--
13	--
14	--
15	1
16	--
17	2
--	--
43	1
Total number of offices	112

TABLE 43

NUMBER OF OFFICES IN EACH NOMA CHAPTER REPORTING THE EMPLOYMENT  
OF A FILING SUPERVISOR

Chapter	No. of Offices		
	Supervisor in Charge of Files		
	Yes	No	Total
Charlotte, N. C. . . . .	5	15	20
Piedmont . . . . . (Greensboro, N. C.)	8 <sup>a</sup>	13	21
Raleigh, N. C. . . . .	3 <sup>b</sup>	12	15
Richmond, Va. . . . .	6 <sup>c</sup>	19	25
Greenville, S. C. . . . .	9 <sup>d</sup>	22	31
Total . . . . .	31	81	112

<sup>a</sup> One office reported a supervisor of old files; one other office reported one supervisor in each section.

<sup>b</sup> One office reported having only a part-time filing supervisor; one other reported a filing supervisor for M. I. B. files only.

<sup>c</sup> One office reported a filing supervisor in the sales service files only.

<sup>d</sup> One office reported a filing supervisor for personnel and payroll records only.

TABLE 44

SUPERVISORS OF FILES WHO PERFORM SOME FILING DUTIES

Chapter	No. of Supervisors
Charlotte, N. C. . . . .	4
Piedmont . . . . . (Greensboro, N. C.)	5
Raleigh, N. C. . . . .	3
Richmond, Va. . . . .	6
Greenville, S. C. . . . .	6
Total . . . . .	24

TABLE 45

## DUTIES PERFORMED BY THE SUPERVISORS OF FILES\*

Duties	No. of Times Checked
Checking of files and supervision . . . . .	1
Sets up the files by department as they are transferred. Assists people in finding files. Indexing . . . . .	1
General supervision of central file department . . . . .	1
Maintain proper distribution and prompt handling of files . . . . .	1
Review all cases prior to filing; supervise other filing clerks . . . . .	1
Supervise and instruct . . . . .	1
Verifying and other miscellaneous duties . . . . .	1
Making reports, processing orders . . . . .	1
Issuing supplies, proofreading . . . . .	1
Office detail . . . . .	1
Office Management . . . . .	3
Secretarial . . . . .	1
Stenographer . . . . .	3
Stenographer-secretary . . . . .	1
Taking responsibility of getting the work to move expeditiously . . . . .	1
Dictaphone operator . . . . .	1
Head bookkeeper . . . . .	1
Certain duties regarding customer orders . . . . .	1
Supervise Stenographic Department . . . . .	1
Incoming-outgoing mail . . . . .	1
Staff or Line supervision . . . . .	1
Clerical . . . . .	1
Varied . . . . .	1
General . . . . .	1
All office functions . . . . .	1
Clearing of cases at Social Service Index (clearing house for all public and private agencies in Richmond City and vicinity). "This is a check which is made so the agency will know if the applicant is known to other bureaus in the city before taking application. Contacting other agencies and public by phone and in person." . . . . .	1



### Filing Organization in the Business Offices

Centralized filing, in which all the files are in one central location, was found to be the plan of organization in 19 offices; decentralized, with different departments keeping their separate files, in 48 offices; and a combination of the centralized-decentralized plan of filing in 41 offices. The last figure includes seven offices for which the respondent checked either "centralized" or "decentralized" in addition to the combination "centralized-decentralized." Table 46 gives these data and includes a column for four offices that wrote "No," without explanatory comment, for all items on this section of the questionnaire.

TABLE 46

#### TYPES OF FILING ORGANIZATION REPORTED BY 112 OFFICES IN THE FIVE NOMA CHAPTERS

Chapter	No. of Offices				Total
	Centralized	Decentralized	Combination	Not Specified	
Charlotte, N. C. . . .	5	6	6	3*	20
Piedmont . . . . . (Greensboro, N. C.)	4	4	13	-	21
Raleigh, N. C. . . .	-	13	2	-	15
Richmond, Va. . . . .	4	12	10	-	25
Greenville, S. C. . . .	6	13	11	1*	31
Total . . . . .	19	48	41	4	112

\* Respondents wrote "No" to all three types of filing organization.

### Methods of Filing

The alphabetic method of filing was the most frequently used method, as shown in Table 47, with 99 offices reporting extensive use of that method and 10 offices reporting its use to a limited degree. Three offices did not indicate any use of the alphabetic method. Subject filing was next in frequency, with 42 offices reporting extensive use and 33 limited use. Numeric filing was used by 61 offices, chronologic by 46 offices, and geographic by 25 offices. Specialized methods written in on the check list by the respondents were: Alpha-Numeric, Branch office, Departmental, County, and Banks.

TABLE 47

#### METHODS OF FILING USED IN THE BUSINESS OFFICES

Method	No. of Offices	
	Extensive Use	Limited Use
Alphabetic . . . . .	99	10
Subject . . . . .	42	33
Numeric . . . . .	44	17
Chronologic . . . . .	17	29
Geographic . . . . .	10	15
Others . . . . .	5	--
Alpha-Numeric . . . . .	1	
Branch Office . . . . .	1	
Departmental . . . . .	1	
County . . . . .	1	
Banks . . . . .	1	

### Systems of Filing Used in Business Offices

Thirty-seven systems of filing were reported in use. Table 48 shows that the Direct Name system was reported most frequently, with extensive use in 42 offices, and limited use in 4 offices. Kardex was next in frequency, reported in extensive use by 20 offices and in limited use by 18 offices. The Library Bureau Direct Alphabetic Index was reported by a total of 17 offices, 15 of which used it extensively. None of the other systems listed on the questionnaire-check list was reported by more than 10 offices, and 16 systems received only one mention each. Items written in by the respondents are grouped at the end of the tabulation. Some of these items seem to designate equipment rather than specialized systems. Since they were reported as systems by the offices, they are so recorded in Table 49.

### On-the-Job Training

The employees in 45 offices had office manuals for reference on the job. (Table 49) Twenty-three of these manuals included filing instructions and are hereafter referred to as filing manuals. In five of these offices the workers who performed filing duties were directed by a supervisor, and in four offices they participated in on-the-job training programs. In five offices, the workers had the combined benefits of an office manual for filing, a training program, and a filing supervisor. (Table 50).

On-the-job training programs were provided by 22, or 19.6 per cent, of the offices included in the study. (Table 51) Two other offices reported "no formal program." This suggests that some phases of training are given the employee after he accepts a position, but may not be

TABLE 48

## FILING SYSTEMS USED IN THE BUSINESS OFFICES

Systems	No. of Offices	
	Extensive Use	Limited Use
Direct Name . . . . .	42	4
Kardex . . . . .	20	18
Library Bureau Direct Alphabetic Index . . . . .	15	2
Numeric Check . . . . .	2	8
Wheeldex . . . . .	4	6
Variadex . . . . .	5	4
Automatic Index . . . . .	4	5
Natural . . . . .	7	2
Duplex-Numeric . . . . .	3	5
Expandex . . . . .	4	3
Sorter Graf . . . . .	3	4
Soundex . . . . .	5	1
Perpetual . . . . .	3	2
Ready-Made . . . . .	2	3
Dewey Decimal . . . . .	1	3
Skyline or Direct Vision . . . . .	3	1
Tailor-Made . . . . .	1	3
Space-Saver . . . . .	--	2
Bee Line . . . . .	1	--
Nual . . . . .	--	1
Safeguard . . . . .	--	1
Tri-Guard . . . . .	--	1
Triple Check . . . . .	--	1
Others (added by respondents)		
Pendaflex . . . . .	5	--
Shaw-Walker 300 Division . . . . .	1	--
Victor-Visible . . . . .	1	--
Gen. Fireproof Direct Alphabetic	1	--
U-MAK-A . . . . .	1	--
Terminal Digit . . . . .	1	--
Acme Visible . . . . .	1	--
Flex-Site Visible . . . . .	1	--
IBM . . . . .	1	--
Visible Records . . . . .	1	--
Decimal . . . . .	1	--
System set up by own accounting method specialists . . . . .	1	--

TABLE 49

NUMBER OF OFFICES REPORTING USE OF OFFICE MANUALS  
AND FILING MANUALS

Chapter	No. of Offices			
	Office Manual		No answer	Office Manuals Including Instructions About Filing
	Yes	No		
Charlotte, N. C. . . . .	10 <sup>a</sup>	10	--	6
Piedmont . . . . . (Greensboro, N. C.)	9	11	1	3
Raleigh, N. C. . . . .	6	9	--	3
Richmond, Va. . . . .	8 <sup>b</sup>	17	--	4
Greenville, S. C. . . . .	12	18	1	7 <sup>c</sup>
Total . . . . .	45	65	2	23

<sup>a</sup> Includes a "projected" office manual.

<sup>b</sup> Includes a manual with filing instructions for some departments.

<sup>c</sup> Includes two other offices with office manuals that did not state whether filing instruction is included.

TABLE 50

OFFICES WITH FILING MANUALS AND OTHER AIDS

Filing Aids	No. of Offices
Total number of filing manuals . . . . .	23
On-the-job training program and supervisor in charge of the files . . . . .	5
On-the-job training program . . . . .	4
Supervisor in charge of the files . . . . .	5

TABLE 51

RESPONSES ABOUT PROVISION FOR ON-THE-JOB TRAINING  
FOR FILE CLERKS

Chapter	No. of Offices			Total
	Yes	No	No answer	
Charlotte, N. C. . . . .	5	14 <sup>a</sup>	1	20
Piedmont . . . . . (Greensboro, N. C.)	4	13	4	21
Raleigh, N. C. . . . .	1	12	2	15
Richmond, Va. . . . .	6	15 <sup>a</sup>	4	25
Greenville, S. C. . . . .	6	20	5	31
Total . . . . .	22	74	16	112

<sup>a</sup> Includes one office reporting "no formal program."

organized into a program. Ten of the offices having on-the-job training programs employed 30 or fewer office workers; two offices employed more than 200 office workers.

On-the-job training in 12 of the 22 training programs reported consists of working under the direct supervision of an experienced employee. Five offices reported a complete training program, one of which was designated as being at the company's expense. Other kinds of on-the-job training reported were: a correspondence course and training with actual files, instruction in "how to file and how to keep the files neat," instruction in the use of standard specimen sheets, and training in filing as a part of the general training program for new employees.

In 13 of the 23 offices indicating a filing manual, a combination of the centralized-decentralized plan of filing organization existed, and five of the same 13 offices reported a filing manual. Three of the four offices reporting a completely centralized plan of organization indicated filing manuals whereas none of the five offices having a completely decentralized plan of filing organization indicated a filing manual. This seems to indicate that the filing processes employed in the offices using a combination of the centralized-decentralized plan of organization or the completely centralized plan involved a more detailed or more complex filing arrangement. It implies, also, that whatever training in filing arrangements may have been received in the schools has not been adequate to meet the needs of the particular jobs. The size of these offices did not seem to have any bearing on whether there was an office manual nor on the opinions relative to the training of prospective file clerks in the schools and the phases in which they preferred to train their own. The offices having a filing manual, an on-the-job training program, a supervisor in charge of the files, and a combination of the centralized-decentralized plan of filing organization wanted the "basic fundamentals" taught in the schools and the "specialized methods and systems" left to be learned on the job.

#### Opinions of Businessmen Regarding School Training of Prospective File Clerks

The opinions of the businessmen relative to the adequacy and inadequacy of the schools' training for prospective file clerks are presented in this section. Of the 112 business offices, the businessmen from 27 offices considered the schools' program adequate; 46 considered it inadequate; and 39 gave no opinion. Table 52 gives these data. Tables 53,

TABLE 52

OPINIONS REPORTED ON ADEQUACY OF SCHOOL TRAINING PROGRAM  
FOR FILE CLERKS

Chapter	No. of Offices				Total
	Yes	No	Not in a position to state	No answer	
Charlotte, N. C. . . . .	4	14 <sup>a</sup>	2	--	20
Piedmont . . . . . (Greensboro, N. C.)	7 <sup>b</sup>	9	4	1	21
Raleigh, N. C. . . . .	2	3	7	3	15
Richmond, Va. . . . .	6 <sup>c</sup>	9	6	4	25
Greenville, S. C. . . . .	8 <sup>d</sup>	11 <sup>e</sup>	8	4	31
Total . . . . .	27	46	27	12	112

- a One office seldom employs office clerical help that has not progressed beyond the high school level.
- b One office stated that the schools may be overdoing the training.
- c One office prefers to do its own training; the response from another office was "fair," and is included in this group.
- d One office stated "partially" and is included in this group.
- e One office commented that filing is a difficult subject to teach.

TABLE 53

FILING ORGANIZATION IN 27 OFFICES CONSIDERING SCHOOL TRAINING  
FOR PROSPECTIVE FILE CLERKS AS ADEQUATE AND IN 46 OFFICES  
CONSIDERING SCHOOL TRAINING INADEQUATE

Type of Organization	No. of Offices	
	Adequate	Inadequate
Combination centralized-decentralized	15	20
Decentralized . . . . .	10	14
Centralized . . . . .	2	11
No answer . . . . .	--	1
Total . . . . .	27	46



54, and 55 give comparative data pertaining to kind of filing organization type of business and size of office. Except in the case of the wholly centralized filing organization in which a larger proportion considered the schools' training inadequate, the opinions as to adequacy seem not to have been affected by plan of organization. Of the offices having a wholly centralized plan of filing organization and considering the schools' training inadequate, two offices had a supervisor in charge of the files, a filing manual, and an on-the-job training program; and four offices had none of these services.

The type of business did not seem to affect the opinions expressed as to the adequacy or inadequacy of the schools in training file clerks, although office outfitters representing "machines and supplies" were more critical of the schools in proportion to their number than were representatives of other types of business.

Table 55 shows that the smaller offices (those offices having fewer than 30 office employees) tend to regard the school training as inadequate to a greater extent than do the larger offices. Of the 56 offices having fewer than 30 office employees, 38 offices responded with an expressed opinion. It is possible that the 18 remaining offices expressing no opinion about the adequacy of the schools' training program felt that the filing problems in their offices were not of sufficient scope to justify a recorded judgment.

Neither the method nor the system of filing in use in the offices seemed to determine whether the particular office considered the schools' training program adequate or inadequate (Tables 56 and 57). However, two of the three offices not indicating the use of the alphabetic method were among those submitting a judgment of "inadequacy."

TABLE 54

TYPES OF BUSINESS REPRESENTED IN GROUPS CONSIDERING SCHOOL  
TRAINING PROGRAMS ADEQUATE AND INADEQUATE IN TRAINING  
FILE CLERKS

Type of Business	No. of Offices	
	Adequate	Inadequate
<u>Manufacturers</u>		
Textiles, Textile Specialties . . . . .	7	7
Steel, Aluminum Products . . . . .	-	3
Hosiery . . . . .	-	1
Batteries . . . . .	-	1
Tobacco and Cigarettes . . . . .	-	1
Biscuits and Crackers . . . . .	1	-
Business Forms . . . . .	-	1
Supports and Braces . . . . .	1	-
Lumber . . . . .	-	1
<u>Office Outfitters</u>		
Machines & Supplies . . . . .	2	9
<u>Financial &amp; Insurance Offices</u>		
Banking . . . . .	2	2
Insurance . . . . .	2	3
<u>Public Utilities &amp; Transportation</u>		
Utilities . . . . .	3	1
Freight Transportation . . . . .	-	1
<u>TRADE</u>		
<u>Distributors</u>		
Petroleum Products . . . . .	3	3
Groceries to Retail Stores . . . . .	1	-
Dairy Products . . . . .	-	1
Electrical, Heating Appliances . . . . .	-	1
Welding Supplies, Equipment . . . . .	-	1
Parts for Motor Trucks . . . . .	-	1
<u>Wholesalers</u>		
Chemicals, Laundry Supplies . . . . .	-	1
Bearings and Parts . . . . .	1	-
Hardware and Seeds . . . . .	1	-
Auto Supplies . . . . .	-	1
<u>Retail Stores</u>		
Department Store . . . . .	-	1
5¢ to \$1 Stores . . . . .	1	-
<u>MISCELLANEOUS</u>		
Accountants & Auditors . . . . .	-	1
Employment Service . . . . .	-	1
Meat Packers . . . . .	1	-
Tobacco Cooperative . . . . .	-	1
Nonprofit Commercial Organization . . . . .	-	1
Trade Assn.--Credit Bureau . . . . .	-	1
Engineers & Architects . . . . .	1	-
Total . . . . .	27	46

TABLE 55

SIZE OF THE 27 OFFICES CONSIDERING SCHOOL TRAINING FOR PROSPECTIVE  
FILE CLERKS AS ADEQUATE AND OF THE 46 OFFICES CONSIDERING SCHOOL  
TRAINING INADEQUATE

No. of Employees	No. of Offices	
	Adequate	Inadequate
1- 9	2	13
10- 19	5	9
20- 29	4	5
30- 39	3	5
40- 49	-	1
50- 59	3	2
60- 69	-	1
70- 79	-	1
80- 89	1	2
90- 99	-	-
100-109	2	-
110-119	2	-
120-129	-	1
130-139	-	-
140-149	-	-
150-159	1	-
160-169	-	-
170-179	-	1
180-189	-	-
190-199	-	1
200-209	1	-
above 200	-	-
212	-	1
355	1	-
400	-	1
428	1	-
485	1	-
Not stated	-	1
Total	27	46

When the offices with file clerks were isolated for tabulation of opinions in Table 58, no outstanding differences were noted in the proportion of file clerks in the offices considering the school training adequate and in those considering it inadequate. Of the 73 offices giving

TABLE 56

METHODS OF FILING USED IN 27 OFFICES CONSIDERING SCHOOL TRAINING  
FOR PROSPECTIVE FILE CLERKS AS ADEQUATE AND IN 46 OFFICES  
CONSIDERING SCHOOL TRAINING INADEQUATE

Method	No. of Offices			
	Adequate		Inadequate	
	Extensive Use	Limited Use	Extensive Use	Limited Use
Alphabetic . . . . .	22	3	43	1
Subject . . . . .	11	9	17	10
Numeric . . . . .	15	3	14	8
Chronologic . . . . .	7	10	5	9
Geographic . . . . .	4	5	7	6
Others (added by respondents)				
Departmental . . . . .	1	--	--	--
Branch Office . . . . .	1	--	--	--

opinions, 21 considering the schools' training inadequate and 13 offices reporting the training adequate had no employee classified as a file clerk.

The offices having employees who performed filing duties but who were not classified as file clerks seemed to be proportionately distributed between the "adequate" and "inadequate" group, as shown in Table 59.

Recommendations from 70 businessmen for school training of office workers were obtained through two items on the questionnaire:

- a. "Please list any recommendations you may have that will improve the training program in our secondary schools for prospective file clerks and other clerical workers."
- b. "In what aspects of filing would you prefer to train your own file clerks?"

TABLE 57

SYSTEMS OF FILING USED IN 27 OFFICES CONSIDERING SCHOOL TRAINING  
FOR PROSPECTIVE FILE CLERKS ADEQUATE AND IN 46 OFFICES CON-  
SIDERING SCHOOL TRAINING INADEQUATE

System	No. of Offices			
	Adequate		Inadequate	
	Extensive Use	Limited Use	Extensive Use	Limited Use
Direct Name . . . . .	7	3	24	1
Kardex . . . . .	4	5	12	8
Library Bureau Direct Alpha- betic Index . . . . .	4	-	7	1
Wheeldex . . . . .	2	3	1	3
Expandex . . . . .	1	3	3	-
Automatic Index . . . . .	1	1	3	1
Variadex . . . . .	1	2	2	1
Duplex-Numeric . . . . .	1	2	2	1
Numeric Check . . . . .	1	1	-	3
Dewey Decimal . . . . .	-	2	2	1
Skyline or Direct Vision . . . . .	-	-	3	1
Soundex . . . . .	1	1	2	-
Tailor-Made . . . . .	1	1	-	2
Ready-Made . . . . .	-	2	1	1
Perpetual . . . . .	-	-	1	2
Natural . . . . .	1	-	2	-
Sorter Graf . . . . .	-	-	1	1
Bee Line . . . . .	-	-	1	-
Triple Check . . . . .	-	-	-	1
Space Saver . . . . .	-	1	-	-
Nual . . . . .	-	1	-	-
Safeguard . . . . .	-	1	-	-
Others (added by respondents)				
Pendaflex . . . . .	1	-	-	-
U-MAK-A . . . . .	1	-	-	-
Terminal Digit . . . . .	-	-	1	-
Acme Visible . . . . .	-	-	1	-
Flex-Site Visible . . . . .	-	-	1	-
Victor Visible . . . . .	-	-	1	-
Standard letter-size file drawers . . . . .	-	-	1	-
Genl. Fireproof Direct Alphabetic . . . . .	-	-	1	-

TABLE 58

NUMBER OF FILE CLERKS REPORTED IN 27 OFFICES CONSIDERING SCHOOL TRAINING FOR PROSPECTIVE FILE CLERKS AS ADEQUATE AND IN 46 OFFICES CONSIDERING SCHOOL TRAINING INADEQUATE

No. of File Clerks	No. of Offices	
	Adequate	Inadequate
None	13	21
1	3	11
2	3	6
3	2	2
4	1	1
5	1	1
6	-	-
7	-	-
8	-	-
9	1	-
10	2	-
11	-	1
12	-	-
13	-	-
14	-	-
15	-	1
16	-	-
17	-	2
..		
..		
43	1	-
Total	27	46

These recommendations, as shown in Tables 60 and 61, were compiled from the verbatim listing found in Appendix II, Tables I and II. The recommendation given most frequently for both the file clerks and for other clerical workers was for more actual practice to supplement the theory. Other desirable work habits and traits have been included in the compilation and are listed as "related factors."

Table 62 summarizes the suggestions made by 55 respondents for school programs received in answer to question "What aspects of filing

TABLE 59

NUMBER OF EMPLOYEES PERFORMING FILING DUTIES IN 27 OFFICES  
CONSIDERING SCHOOL TRAINING FOR PROSPECTIVE FILE CLERKS  
ADEQUATE AND IN 46 OFFICES CONSIDERING SCHOOL  
TRAINING INADEQUATE

No. of Employees Performing Filing Duties	No. of Offices	
	Adequate	Inadequate
1- 4	6	22
5- 9	6	11
10-14	6	5
15-19	2	3
20-24	1	4
25-29	1	--
30-34	1	--
35-39	-	--
above 50		
60	1	--
100	1	1
125	1	--
225	1	--
Total	27	46

should be taught in the school?" Appendix II gives the verbatim comments from which the tabulation was compiled. The aspect most frequently suggested, offered by 58 per cent of those responding to this item, pertained to the fundamental principles of the various methods. Specific methods were mentioned by other respondents, with alphabetic filing or "teach the alphabet" mentioned 10 times. If the alphabetic method is implied in the general statement about the principles of the various methods, it rates a total frequency of 42, and appears to be the focus suggested for school programs.

Responses referring to the purpose and importance of filing call for improved concepts of business filing.

TABLE 60

RECOMMENDATIONS FROM BUSINESSMEN RELATIVE TO SCHOOLS' TRAINING  
PROGRAM FOR FILE CLERKS

Recommendation	Frequency of Mention
More actual application and practice . . . . .	10
Teach all filing methods and systems in detail . . . . .	8
An elementary knowledge of filing . . . . .	7
The alphabet . . . . .	10
Emphasis on alphabetic filing . . . . .	3
Teach to organize daily program and include the filing of all papers; keep files up-to-date . . . . .	4
Fewer misc. folders and more indexing . . . . .	1
Practice on cross reference filing . . . . .	1
Distinguish between adj. and nouns in subject filing . . . . .	1
Lecture by competent office equipment representative relative to new filing equipment, methods, systems . . . . .	1
Schools should work through NOMA Ed. Committee or other similar group of practical businessmen . . . . .	2
More adequate equipment to work with . . . . .	3
Devote more time to all business subjects . . . . .	3
Teachers should make surveys often of actual business applications. . . . .	1
File clerk should train for better position with more pay . . . . .	1
More pupils should be encouraged to study filing as it now pays almost as well as stenographic work . . . . .	1
Set up a strictly business administration course which would include filing, typing, shorthand, bookkeeping, business machines . . . . .	1
<u>Related Factors</u> . . . . .	7
Accuracy . . . . .	4
Concentration on task at hand and development of proper attitude toward work . . . . .	3
Interest and initiative . . . . .	2
Improvement in penmanship . . . . .	2
Cooperation with others . . . . .	2
Sense of responsibility . . . . .	2
Improvement of memory . . . . .	1
Consistency . . . . .	1
Neatness in work . . . . .	1
Precision . . . . .	1
Punctuality . . . . .	1
Appearance--what to wear . . . . .	1



TABLE 61

RECOMMENDATIONS FROM BUSINESSMEN RELATIVE TO SCHOOLS' TRAINING  
PROGRAM FOR CLERICAL WORKERS

Recommendation	Frequency of Mention
Practical experience to supplement theory . . . . .	7
Course should include a working knowledge of typing, shorthand, bookkeeping, and various business machines used in offices . . . . .	5
Frequent surveys of business to learn requirements . . . . .	2
Fundamentals of various basic methods and systems of filing . . . . .	2
More training of proper record keeping . . . . .	2
Work through NOMA Educational Committee or other similar organization of practical businessmen . . . . .	1
Have outside clerical workers attend classes and ex- plain their job and perform them for the class . . . . .	1
Encourage more pupils to study filing . . . . .	1
Devote more time to all business subjects including filing . . . . .	1
Fundamentals of business administration . . . . .	1
Commercial course should have active support of NOMA . . . . .	1
Perfection of shorthand transcripts . . . . .	1
More emphasis on typing . . . . .	4
More practice typing figures . . . . .	2
Filling in forms . . . . .	1
<u>Related Factors</u>	
Efficiency . . . . .	3
Accuracy . . . . .	3
Development of correct attitudes . . . . .	3
Cooperation with other employees . . . . .	2
Proper telephone technique . . . . .	2
Sense of responsibility . . . . .	2
Neatness . . . . .	2
How to receive callers . . . . .	1
Appearance--what to wear . . . . .	1
How to accept instructions . . . . .	1
How to approach problem with reason rather than emotion . . . . .	1
Realization that promotion must be earned . . . . .	1
Regard for company rules . . . . .	1
How to apply for a job . . . . .	1
More emphasis on proper work habits . . . . .	1
Concentration on task at hand . . . . .	1
Promptness . . . . .	1
Thoroughness . . . . .	1
Personality Development . . . . .	1
More thorough knowledge of basic English grammar . . . . .	8
Basic arithmetic . . . . .	8
Spelling . . . . .	7
Penmanship . . . . .	4
Alphabet . . . . .	1
Other rudimentary education . . . . .	2

TABLE 62

OPINIONS OF BUSINESSMEN CONCERNING ASPECTS OF FILING THAT SHOULD BE  
 TAUGHT IN THE SCHOOLS' TRAINING PROGRAM

Opinion	No. of Mentions
Fundamental principles of the various methods . . . . .	32
Establish a feeling of importance of having a good filing organization . . . . .	6
General purpose of filing; value of finding data promptly; what to consider when filing . . . . .	5
Alphabetic filing . . . . .	4
Alphabet . . . . .	3
Alphabetic and numeric filing . . . . .	1
Alphabetic, numeric, and subject filing . . . . .	1
Numeric or digit filing . . . . .	1
Filing by subjects . . . . .	1
Combination of record-keeping with filing (unit plan) . .	1
Centralized filing organization . . . . .	1
Job-level training included in schools' program . . . . .	1
Types of equipment and use . . . . .	1
How to move files at end of year . . . . .	1
<u>Related Factors:</u>	
Accuracy . . . . .	3
Efficiency . . . . .	2
Concentration on task at hand . . . . .	1
Sense of responsibility . . . . .	1

A few respondents stipulated technical instruction, such as centralized filing, transferring files, and a study of equipment.

Work habits and personal traits, both for file clerks and for other clerical workers (See Tables I and II), were additional items mentioned in which the businessmen desired further training. These items have been listed as "related factors" in the tables. Neatness, efficiency, accuracy, a sense of responsibility, and concentration on the task at hand were mentioned.

Table 63 presents information from 53 businessmen who stated some phases in which they prefer to train their own file clerks. Table IV in Appendix II lists the original comments from which Table 63 was compiled. Thirty of the 53 business offices employed workers classified as file clerks; 20 had a supervisor in charge of the files; and 16 had on-the-job training programs. Five businessmen believe that each firm should teach and train its own file clerks, and four others prefer to do their own training in the common methods of filing, including alphabetic. Most of the responses, however, concerned the application of filing principles to specialized methods or systems.

The added items, listed in the table as "related factors," imply that these respondents impose no responsibility on the school program for the specified personal traits, but prefer to undertake those aspects as in-service training.

There was duplication in the recommendations given for the file clerks and for other clerical workers. For example, the recommendation relative to the desirability of including actual application and practical experience to supplement the theory was mentioned 17 times. It was the recommendation most frequently mentioned in the lists included in Appendix II, also. Some of the businessmen would like the

TABLE 63

ASPECTS OF FILING IN WHICH BUSINESSMEN PREFER TO TRAIN  
THEIR OWN FILE CLERKS

Aspects of Filing	Frequency of Mention
Application to special methods and systems in the business and technical aspects or finer points of application of a system to a specific job . . . . .	34
In accordance with present office procedures . . . . .	1
Believe each firm should teach and train own file clerks . . . . .	5
Maintaining a filing system based on present needs and not a file to have a file; importance of records . . . . .	3
Train them alphabetically . . . . .	2
Alphabetic and numeric filing . . . . .	1
Alphabetic, numeric, and subject filing . . . . .	1
80-period Rem. Rand plus Kardex . . . . .	1
Record-keeping with filing (unit plan). . . . .	1
<u>Related Factors:</u>	
Neatness . . . . .	1
Efficiency . . . . .	1
Good memory and always double check before filing . . . . .	1
Skill, responsibility and effort . . . . .	1

prospective file clerk to be taught the various methods and systems in detail. Other comments offered such suggestions as: have outside clerical workers come in and demonstrate the filing activities they perform on the job; have the schools work through the NOMA Educational Committee or other

similar organization of practical businessmen" to improve its program.

The matter of personality development was also mentioned. The businessmen suggested that the schools should teach the prospective file clerks and other clerical workers to be accurate, to concentrate on the job at hand, to develop interest and initiative, to develop a good memory, to be neat in doing the work, and to develop a sense of punctuality. One businessman would like the schools to instill in the prospective employee a sense of what is appropriate to wear on the job for correct appearance in the office. Some businessmen would like emphasis placed on developing a more thorough knowledge of basic English grammar, basic arithmetic, spelling, and penmanship.

#### Comparative Data on Head and Branch Offices

The individual items on the questionnaires to the businessmen have been tabulated according to head office and branch office to determine whether any distinction should be made in the filing training for schools located in areas having a predominance of head offices or of branch offices, or whether training for both types should be given consideration. These data are shown in Table 64, representing 75 head offices and 37 branch offices. No outstanding differences in the proportions of the various items were noted except in the plan of filing organization, on-the-job training programs, and filing manuals. Thirteen per cent of the head offices and 24 per cent of the branch offices used the centralized plan of filing organization. On-the-job training was reported in 15 per cent of the head offices and in 30 per cent of the branch offices, indicating a possibility that office personnel may receive initial training in a branch office before being transferred to the head office. This inference

TABLE 64

COMPARATIVE DATA ON 75 HEAD OFFICES AND 37 BRANCH OFFICES

Filing Data	No. of Offices		
	Head	Branch	Total
Employees Performing Filing Duties . . .	1384	224	1608
File Clerks . . . . .	181	45	226
Supervisors . . . . .	20	11	31
Plan of Filing Organization			
Decentralized . . . . .	35	13	48
Combination . . . . .	26	15	41
Centralized . . . . .	10	9	19
On-the-Job Training Program . . . . .	11	11	22
Filing Manuals . . . . .	8	15	23
Methods			
Alphabetic . . . . .	75	34	109
Subject . . . . .	47	28	75
Numeric . . . . .	42	19	61
Chronologic . . . . .	30	16	46
Geographic . . . . .	14	11	25
Others (listed by respondents)			
Branch Office . . . . .	1	--	1
County . . . . .	1	--	1
Alpha-Numeric . . . . .	--	1	1
Departmental . . . . .	--	1	1
Banks . . . . .	1	--	1
Systems			
Direct Name . . . . .	32	14	46
Kardex . . . . .	27	11	38
Library Bureau Direct Alphabetic Index	15	2	17
Numeric Check . . . . .	8	2	10
Wheeldex . . . . .	8	2	10
Variadex . . . . .	7	2	9
Automatic Index . . . . .	7	2	9
Natural . . . . .	6	3	9
Duplex-Numeric . . . . .	8	--	8
Sorter Graf . . . . .	6	1	7
Soundex . . . . .	5	1	6
Perpetual . . . . .	4	1	5
Ready-Made . . . . .	3	2	5
Dewey Decimal . . . . .	3	1	4
Skyline or Direct Vision . . . . .	4	--	4
Tailor-Made . . . . .	2	2	4
Space Saver . . . . .	2	--	2
Bee Line . . . . .	1	--	1
Nual . . . . .	1	--	1
Safeguard . . . . .	1	--	1
Tri-Guard . . . . .	1	--	1
Others (listed by respondents). . . . .	10	6	16

is supported by the finding that 40 per cent of the branch offices had filing manuals, as compared with 10 per cent of the head offices. It suggests, also, that the schools offering such instruction need include only the basic fundamentals of filing training, leaving the specialized filing activities to be learned on the job.

## CHAPTER V

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This study has presented data concerning the status of filing instruction in the public white high schools of North Carolina, and the filing activities in a group of business offices. The data, obtained through questionnaires, represent 80 per cent of the 379 public white high schools offering business subjects in the state, and 60 per cent of the 185 business offices represented in the membership of Area 3 of the National Office Management Association covering North Carolina and parts of Virginia and South Carolina.

#### SUMMARY

The 305 schools responding to the questionnaire ranged from one very small high school with 36 pupils to one large school with 1,914 pupils, with most of the schools having enrollments of less than 300. Most of the schools employed only one business teacher, with some of these teachers devoting only part time to business subjects. Data supplied by 264 schools showed the number of pupils taking two or more business subjects to be 8,216; and by 273 schools, the number taking only one business subject to be 15,153; with a total of 33,878 reported as the aggregate from partial reports on course enrollments of 304 schools.

There were 16 schools offering only one business course, and 33 offering only two business courses. The remaining 256 schools offered more than two business courses.



A total of 22 different courses was found to be offered in the 305 schools. Typewriting, bookkeeping, shorthand, and general business showed the largest enrollments and were the most frequently offered courses. Typewriting was offered in 297 of the schools. Most of the business courses were offered on the eleventh and twelfth grade levels, with a small number of schools admitting tenth grade pupils in practically all of the courses. General business and first-year typewriting were reported on all levels. General business was most often placed on the tenth grade level, or tenth and higher.

This survey included 442 teachers of business subjects, of whom 211 were in one-business-teacher departments. One hundred fifty-eight teachers in one-business-teacher departments were full-time teachers of business subjects, and 53 were part-time.

One hundred seventy-seven schools reported that no filing was taught. One hundred twenty-eight schools reported the teaching of some filing, with six of these offering a separate course. The 177 schools reporting no filing instruction and the 122 reporting filing units were found to be similar in most respects. Approximately three-fourths of both groups of schools had fewer than 300 in total pupil enrollment, fewer than 90 pupils enrolled in one business course only, and fewer than 50 enrolled in two or more business courses.

A larger proportion of the schools offering no filing instruction reported only one business teacher or one part-time teacher. One hundred thirty-four of the 177 schools not offering filing had only one business teacher, as compared with 77 of the 122 schools that offered filing.

Sixty-three per cent of the 152 teachers furnishing information about their formal education indicated that they had had formal instruction in filing.

The six courses in filing gave varied findings, ranging in time allotment from six weeks to a year's course, and varying also in their content, equipment, and provision for pupil activities. The 6 schools in which filing courses were offered ranged in size from 200 pupils to 1,300 pupils enrolled.

When filing was presented as a unit within another subject, it was usually in general business or in typewriting. On the basis of replies from 98 schools, the average time given to filing instruction in all courses was found to be 8 clock hours, with a total range of from less than 2 clock hours to more than 38 clock hours. The majority of the schools devoted from five to ten class periods, ranging from 45 to 60 minutes in length, to filing instruction. Respondents from 89 schools did not consider an increase in time essential in filing instruction. Thirty-three of the schools offering filing instruction favored an increase in the time allotted to filing. Most of these schools devoted from 8 to 13 clock hours to the filing units. Several respondents explained that lack of teachers and the need for more equipment and materials made this impossible.

Respondents appeared to have been hesitant to reveal the quantity and kind of equipment available in their schools. Some respondents commented that the business department was in the early stages of organization, or that there was little equipment; others omitted responses on the check-list. Vertical files were most often mentioned by the 52 schools supplying data on equipment. Box files were reported by half of the schools but were mostly limited to illustrative purposes. Miniature filing sets were reported by less than half of the schools, and various other types of equipment received infrequent mention.

About one-third of the schools were provided with folders for pupil activities, and another one-third of the schools used folders for illustrative materials. Alphabetic guides received about the same frequency of mention as folders. Although cards and paper cut in card size were reported by 40 schools for pupil activities and for illustrative purposes by 6 schools, card guides were provided by only 7 schools for pupil activity and 5 schools for illustrative purposes.

The instructional materials reported both for pupil activity and for illustrative purposes consisted mostly of cards or of paper cut in card size or standard-size letters and printed miniature letters. It was noted, however, that there were more instances of "miniature filing sets" in use in pupil activities than of "miniature letters" for both pupil activities and illustrative purposes.

Although 128 schools reported that filing instruction was provided, only 47 schools supplied information concerning the nature of instruction. All of these schools gave instruction in the alphabetic method, with one school limiting all instruction to that method; 45 in numeric filing; 45 in subject filing; 42 in geographic filing; and 34 in chronologic filing. With the exception of the alphabetic method, about one-half of the instruction was limited to discussion without activity on the part of the pupils. Filing manuals were used in about one-third of the schools. Such special processes as indexing, cross referencing, and coding were reported by some but not all the schools; and instruction here was, in some instances, in the nature of discussion rather than pupil activity. The fact that rapid finding was added by one respondent as a special activity implies a departure in emphasis on the part of that school.

Few respondents filled in information about the filing systems involved in their filing instruction. Seventeen schools reported use of the Dewey Decimal system, but the limited time devoted to filing instruction and the complexity of the system suggest that instruction in the Dewey Decimal system may have been from the standpoint of pupil use of the library. A few other specialized systems, such as Direct Name, Variadex, and Numeric Check were checked for both pupil activity and discussion by a few respondents.

Pupil achievement was most often measured by teacher-constructed tests, with some schools issuing certificates. Of the 128 schools teaching filing, 76 omitted an answer to the question about providing experience for the application of filing knowledge; 31 stated that no provision was made; and 21 stated that some provision was made, usually in the principal's office.

Of the schools that expressed an opinion about the desirability of including filing instruction in the business curriculum, 157 definitely wanted a separate filing course and 138 a learning unit. Fifty-four schools did not favor the inclusion of a separate filing course; 33 opposed a learning unit; and 12 schools did not desire to include any filing instruction. Respondents pointed out that some of the reasons for having little or no instruction was lack of equipment for the pupils to have any filing activities, lack of pupil time for scheduling elective courses, and lack of teacher time because of heavy teaching schedules.

In recommending business courses appropriate for the inclusion of a filing unit, the teachers gave preference to typewriting and the practice courses, but a sufficient number of teachers mentioned general business, bookkeeping, and shorthand to rate them as suitable courses for including filing instruction.

The 112 business offices participating in this study were representative of the various classifications of businesses reported by the Employment Security Commission of North Carolina. Thirty-two per cent were offices of manufacturing concerns; 19 per cent were classified as "Trade" industries and included distributors, wholesalers, and retailers. Fifteen per cent were office outfitters. The remaining offices were classified as financial and insurance offices, public utilities and transportation, or construction firms, and a few were grouped as miscellaneous. Thirty-seven of the 112 business offices were branch offices and 75 were head offices.

The offices ranged in size from the ones conducted by one individual to one large office employing 485 office employees. Half of the offices employed fewer than 30 office workers. Twenty-five per cent of the office employees performed some filing duties, and 3.5 per cent of the office employees were classified as file clerks.

All three plans of filing organization--centralized, decentralized, and a combination of centralized-decentralized--were reported, with the completely decentralized plan being reported by the largest group, or 43 per cent of the offices in the sampling, and a combination of the centralized-decentralized plan by 37 per cent of the offices. A few offices reported the completely centralized plan. A supervisor in charge of files was reported by 31 offices. Filing manuals were provided in 23 offices, and on-the-job training programs were found in 22 offices.

Thirty-seven different systems of filing were reported by the offices. The majority of these received infrequent mention, and some systems that were included in the higher frequencies were reported as having "limited use." The three most often named were Direct Name, Kardex,

and Library Bureau Direct Alphanumeric Index. These were also named most frequently by the schools that reported on the systems in use in their filing instruction. Each of these systems involves the methods reported by the schools. The frequency ranking of other methods corresponded fairly closely with the frequencies tabulated for the methods used in business offices.

Seventy-three businessmen responded to the request for opinions about the adequacy of schools in training file clerks. The responses came from 39 offices having file clerks and from 34 offices with no workers classified as file clerks. Of the 39 offices having workers classified as file clerks, 14 offices considered the schools' training adequate, and 25 offices considered the training inadequate.

The plan of filing organization seemed to have little effect upon the opinions regarding the adequacy of school training, although a slightly larger proportion of the offices with wholly centralized filing arrangements considered the school training inadequate. There seemed to be a slight tendency on the part of office outfitters and of offices employing fewer than 50 workers to consider school training inadequate.

#### CONCLUSIONS AND RECOMMENDATIONS

The findings of this study that 25 per cent of the 6,463 office employees sampled in this study perform filing duties and only 3.5 per cent are file clerks do not support the opinions reflected in the professional literature that most clerical workers do filing, and, therefore, filing should be incorporated in all the high school business programs. This conclusion, however, does not mean that elementary instruction in filing should be eliminated from the school training program. The finding

that 72 per cent of the teachers in the schools offering no filing instruction think such instruction should be included, and that 28 per cent of the teachers giving such instruction think the time allotment should be extended, is sufficient basis for serious consideration of the inclusion of filing instruction.

It is the expressed opinion of a considerable number of businessmen that the schools should provide basic instruction in the principles of filing. Desirable objectives evolving from the responses of the businessmen include: more emphasis on alphabetic filing; teaching the fundamental principles of the various methods; provision for more actual application and practice to supplement the theory; establishing a feeling of importance of having a good filing organization; having the pupil understand the general purpose of filing, the value of finding data promptly, and what to consider when filing.

Although filing instruction in the schools was most often found in the general business course, a question may be raised in connection with the 44 per cent of the 132 schools offering general business but not including filing instruction, **inasmuch as the state course of study and state-adopted textbooks in general business provide for units on filing.** It would seem desirable, in those schools where general business is offered, to retain filing instruction unless some other provision is made or unless community surveys reveal no need for such instruction.

The everyday needs of the individual include general alphabetic finding of items in directories, catalogs, indexes, and general library use. A unit in filing could provide learning in these aspects, especially in such activities as keeping cards and papers in an ordered sequence. It is possible that such learning experiences could be provided in a reduced

period of time, shorter than the five to ten class periods usually devoted to filing instruction. General business can provide the learning experiences necessary for these elementary aspects of filing for everyday needs.

Filing instruction may be appropriately included in typewriting, especially since some of the activities connected with filing require the use of a typewriter. This fact is emphasized by W. S. Barnhart in his layout of special business rooms in the Fifth Joint N. B. T. A. and E. C. T. A. Yearbook in which he states that "access by the pupil to a typewriter is essential in the study of filing."<sup>18</sup>

A logical place for filing instruction, also, is in the vocational or applied courses such as secretarial practice, office practice, office machines, and clerical practice--not primarily for the preparation of file clerks, but as an essential part of realistic practice for office work, and to provide a basis for developing concepts and understanding of the interrelation of office activities and, as stated in responses received in this study, an "understanding of the importance of a good filing organization." Those schools having a practice course and located in a community needing vocationally trained filing employees should incorporate a filing unit. James R. Meehan of Hunter College in New York City emphasizes the necessity for such filing instruction here by pointing out that "alphabetic filing is an essential part of all secretarial and clerical practice courses because this system of filing is used in approximately eighty per cent of all filing installations."<sup>19</sup>

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18. W. S. Barnhart, Physical Layout, Equipment, Supplies for Business Education, Somerset Press, Inc., Somerville, New Jersey, 1948, p. 107.

19. James R. Meehan, Physical Layout, Equipment, Supplies for Business Education, Somerset Press, Inc., Somerville, New Jersey, 1948, p. 229.



The fact that filing instruction is usually limited to the five basic methods, with the major emphasis placed on alphabetic filing, seems to be in accord with the methods used in the business offices and with the opinions of the businessmen about the basic methods needed. It is recommended that the major portion of the attention continue to be directed to the alphabetic method since that method was almost universally reported by the business offices and since the other methods use the principles involved in the alphabetic method. This recommendation conforms to a principle stated by Tonne that the schools should not attempt to teach the highly specialized and routine office skills. According to Tonne, such skills should be left to be learned on the job.<sup>20</sup> It is also supported by Potter's recommendation that the first consideration in the general clerical training program of the secondary school be given to alphabetic filing.<sup>21</sup>

It is not recommended that elaborate outlay be made for equipment and specialized systems for filing instruction in the schools, but more adequate instructional supplies and working materials for the pupils to use would facilitate effective learning of the basic principles and would enable the schools to offer classroom filing activities to supplement the theory in carrying out the recommendations of businessmen for the improvement of the school training program. Simulated cards and copies of business letters may be provided at little or no cost for use as learning materials.

In view of the fact that certain personality traits were mentioned by the office managers, it is suggested that the school direct attention to the development of these traits. The traits mentioned for consideration

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20. Herbert A. Tonne, Principles of Business Education, The Gregg Publishing Company, New York, 1947, p. 181.

21. Potter, op. cit., p. 75.

are: development of a sense of responsibility, ability to cooperate with others, a sense of punctuality, understanding of the proper clothes for a correct office appearance, proper attitude toward the work at hand, and ability to concentrate. Development of these traits is emphasized by Harm Harms in a report by the Hartford (Connecticut) NOMA Chapter's Committee on Education, in which recommendation is made for "greater emphasis on personal qualifications such as appearance, attendance, conduct and etiquette."<sup>22</sup>

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22. Harm Harms, "Office Standards and Co-operation with Business," UEEA Forum, December, 1947, p. 14.

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APPENDICES

## APPENDIX I

### QUESTIONNAIRES AND FOLLOW-UPS

#### Schools

First letter of transmittal  
Second letter of transmittal  
Questionnaire  
Postal Card Follow-Ups

#### Business Offices

First letter of transmittal  
Second letter of transmittal  
Questionnaire  
Postal Card Follow-Up

## APPENDIX II

### TABLES

- I. Comments from Businessmen for the Improvement of the Training Program for Prospective File Clerks in our Secondary Schools
- II. Comments from Businessmen for the Improvement of the Training Program for Prospective Clerical Workers in our Secondary Schools
- III. Comments of the Businessmen in Answer to Question: "What Aspects of Filing Should Be Taught in School?"
- IV. Comments of the Businessmen on Question "In What Aspects Would You Prefer to Train Your Own File Clerks?"

## APPENDIX III

### MISCELLANEOUS

Textbooks and Supplementary References Used in the Schools  
Vocational Curriculums in One High School (Wilmington, N. C.)  
Number of Students Taking Commercial Subjects in Virginia High Schools, 1947

## APPENDIX I

February 9, 1948

To the Head of the Business Education Department:

The purpose of the study I have chosen for my Master's thesis at the University of North Carolina is to determine whether the schools are preparing potential office employees for the filing duties they will perform on the job. I need to find whether filing is taught, and if it is, to what extent, and what equipment, supplies, and methods are discussed and illustrated.

A jury of businessmen is also to be consulted to find what filing skills and knowledges are essential for initial office positions, and their opinions in regard to what the schools should do about the teaching of filing.

When the study is completed, copies will be available in the library of the Woman's College.

As one of the teachers of business subjects in our state, will you please take a few minutes of your time to let me know the status of filing instruction in your school by filling in this questionnaire? Your cooperation, assistance, and suggestions will be appreciated.

Very truly yours,

*Martha Wheless*

Martha Wheless

Enclosure



Brevard College  
Brevard, North Carolina  
April 16, 1948

To the Heads of the Business Education Departments:

A questionnaire to determine the extent of filing taught in the North Carolina schools was mailed you sometime ago. This questionnaire is to obtain information for a study I am conducting in partial fulfillment of the requirements for a Master's degree from The Woman's College, Greensboro, North Carolina.

So far, there has been no response from you. I would appreciate it if you will give me whatever information you can so that your school can be included in this study. Your attention to this matter at your earliest convenience will be most heartily appreciated.

Sincerely yours,

*Martha Wheless*  
Martha Wheless

Questionnaire to Business Education Departments of North Carolina High Schools

Name of high school \_\_\_\_\_ City \_\_\_\_\_ County \_\_\_\_\_

Name of person filling in questionnaire \_\_\_\_\_

Position or title \_\_\_\_\_

What is the enrollment of your high school? \_\_\_\_\_

How many of these pupils are enrolled in only one business subject? \_\_\_\_\_

How many of these pupils are enrolled in two or more business subjects? \_\_\_\_\_

How many part-time teachers of business subjects do you have in your school? \_\_\_\_\_  
(If more than one school in your system, report only for your school)

How many full-time teachers of business subjects do you have in your school? \_\_\_\_\_

Has there been any follow-up made of students from your school who secured office positions? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, in what year? \_\_\_\_\_

Does the study give any information about the filing duties performed on the job? \_\_\_\_\_

By whom was the study made? \_\_\_\_\_

Where may a copy be secured? \_\_\_\_\_

Write responses in blanks below regarding subjects taught in your school:

Subject	Grade Level	No. pupils enrolled	No. weeks	Check courses required for bus. majors, if any	Offered	
					Every yr.	Alternate yr.
Bookkeeping						
First year . . . . .						
Second year . . . . .						
Business Arithmetic . . . . .						
Business Correspondence . . . . .						
Business English . . . . .						
Business Law . . . . .						
Business Organization . . . . .						
Clerical Practice . . . . .						
Consumer Economics . . . . .						
Cooperative Office Educ. . . . .						
Distributive Education . . . . .						
Economic Geography . . . . .						
Filing . . . . .						
General Business . . . . .						
Office Machines . . . . .						
Office Practice . . . . .						
Principles of Selling . . . . .						
Secretarial Practice . . . . .						
Shorthand						
First year . . . . .						
Second year . . . . .						
Typewriting						
First year . . . . .						
Second year . . . . .						
Others (please list)						
_____						
_____						

Which are the subjects taught by teachers who have had formal instruction in filing? \_\_\_\_\_

List the subjects which are taught by teachers who are not certified in business: \_\_\_\_\_

Questionnaire - 2

If filing is taught as a learning unit within any of the subjects below, indicate the subject or subjects by giving the number and length of periods devoted to filing:

Subject	Approximate number of periods	Length of periods
Bookkeeping		
First year . . . . .		
Second year . . . . .		
Business Arithmetic . . . . .		
Business Correspondence . . . . .		
Business English . . . . .		
Business Law . . . . .		
Business Organization . . . . .		
Clerical Practice . . . . .		
Consumer Economics . . . . .		
Cooperative Office Education . . . . .		
Distributive Education . . . . .		
Economic Geography . . . . .		
General Business . . . . .		
Office Machines . . . . .		
Office Practice . . . . .		
Principles of Selling . . . . .		
Secretarial Practice . . . . .		
Shorthand		
First year . . . . .		
Second year . . . . .		
Typewriting		
First year . . . . .		
Second year . . . . .		
Others (please list)		
_____ . . . . .		
_____ . . . . .		

If no filing course is taught, do you feel that there is a need for such a course in your school? \_\_\_\_\_

If no filing is taught as a learning unit within a course, do you think it should be incorporated? \_\_\_\_\_

If so, in what course or courses? \_\_\_\_\_

IF NO FILING IS TAUGHT IN YOUR SCHOOL, DISREGARD THE REMAINDER OF THIS QUESTIONNAIRE.

What equipment and supplies are available for the teaching of filing?

Check which are for pupil activities and which for illustrative purposes:

Equipment and Supplies	Pupil Activities	Illustrative Purposes
Vertical files . . . . .		
Visible files . . . . .		
Miniature filing sets . . . . . (issued by what company)		
_____		
Wheelindex files . . . . .		
Sorting tray . . . . . state nature _____		
_____		

Questionnaire - 3

Equipment and Supplies (cont'd)	Pupil Activities	Illustrative Purposes
Box files . . . . .		
Bellows files . . . . .		
Flat files . . . . .		
Shannon files . . . . .		
Follow-up or tickler files . . . . .		
Transfer cases . . . . .		
Clip boards . . . . .		
Statement posting trays . . . . .		
State nature _____		
Spindle files . . . . .		
Folders . . . . .		
Out Guides or Folders . . . . .		
Substitution Cards . . . . .		
Requisition Slips . . . . .		
Follow-up cards . . . . .		
Labels . . . . .		
Cross Reference sheets . . . . .		
Alphabetical guides . . . . .		
Date guides . . . . .		
Card guides . . . . .		
Others (please list) _____		
_____		
_____		

Indicate the learning materials used in teaching your filing unit, and state source where indicated. Check which are for pupil activities and which are for illustrative purposes.

Materials	Pupil Activities	Illustrative Purposes
Cards . . . . .		
Paper cut in card size . . . . .		
Miniature letters . . . . .		
Published by _____		
Regular size letters . . . . .		
State nature _____		
Business papers . . . . .		
where obtained _____		
Teacher prepared materials . . . . .		
State nature _____		
Job sheets . . . . .		
State nature _____		
Filing Manual . . . . .		
Title _____		
Author _____		
Publisher _____		
Others (please list) _____		
_____		
_____		
_____		

Questionnaire - 4

Indicate by a check mark the methods of filing and the special activities taught in your filing unit. Indicate whether pupil actually uses each in filing his materials, or whether merely the method is discussed.

Methods & Special Activities	Pupil Activities	Discussion only
Alphabetic . . . . .		
Subject . . . . .		
Numeric . . . . .		
Geographic . . . . .		
Chronological . . . . .		
Indexing . . . . .		
Coding . . . . .		
Cross referencing . . . . .		
Others (please list)		
_____ . . . . .		
_____ . . . . .		
Do you use any of these systems: Yes _____ No _____		
If yes, please check:		
Systems	Pupil Activities	Discussion only
Automatic Index . . . . .		
Bee Line . . . . .		
Direct Name . . . . .		
Dewey Decimal . . . . .		
Duplex-Numeric . . . . .		
Expandex . . . . .		
Kardex . . . . .		
Leader . . . . .		
Library Bureau Direct Alphabetic Index . . . . .		
Natural . . . . .		
Numeric Check . . . . .		
Nual . . . . .		
Perpetual . . . . .		
Ready-Made . . . . .		
Safeguard . . . . .		
Skyline or Direct Vision . . . . .		
Sorter Graf . . . . .		
Soundex . . . . .		
Space-Saver . . . . .		
Tailor-Made . . . . .		
Tri-Guard . . . . .		
Triple Check . . . . .		
Variadex . . . . .		
Wheeldex . . . . .		
Others (please list)		
_____ . . . . .		
_____ . . . . .		

Questionnaire - 5

If filing is taught either as a learning unit or as a separate course, please answer the following:

- (1) Is any provision made for actual application to office problems outside class other than homework assignments? \_\_\_\_\_ . If yes, please explain \_\_\_\_\_

- (2) Are the pupils measured by testing on the filing unit? Yes \_\_\_\_\_ No \_\_\_\_\_

Source:

Published tests to accompany textbook \_\_\_\_\_

Teacher-constructed tests \_\_\_\_\_

Standardized tests \_\_\_\_\_

Other published tests \_\_\_\_\_

Nature:

Performance \_\_\_\_\_

Statement of the rules \_\_\_\_\_

Others \_\_\_\_\_

If none of these methods of testing are used, what measure is used? \_\_\_\_\_

- (3) Are certificates of proficiency awarded? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, state nature \_\_\_\_\_

- (4) Would you like to increase the length of time allotted to teaching filing in your school? \_\_\_\_\_

## POSTAL CARD FOLLOW-UPS

(March 10)

March 10, 1948

To the Heads of the Bus. Ed. Departments:

On February 9 I mailed you a copy of a questionnaire on filing which was to be filled in by the head of each business education department in the North Carolina high schools. To date, I have had no response from your school. I would certainly appreciate it if you would help me by filling in and returning this questionnaire.

Sincerely yours,

Martha Wheless

(May 13)

May 13, 1948

To the Heads of the Bus. Ed. Departments:

I know that you are quite busy amid all the turmoil involved in the commencement season, but I would appreciate it a very great deal if you would take a few minutes and give me a few facts about filing in your school. You already have the forms for this information as I just recently sent them to you. In case they have been misplaced, I shall be glad to furnish you with another copy. If filing is not taught in your school, I would like to know that.

Anything that you can help me with this matter will be heartily appreciated.

Sincerely yours,

Martha Wheless

February 25, 1948

Dear Sir:

As a partial fulfilment of the requirements for a Master's degree at the Woman's College, I am making a study of the status of filing in North Carolina. This study is to be approached from the standpoint of both business and the secondary school.

In order to find what the businessman thinks, I am submitting the attached questionnaire to the businessmen who have membership in the chapters of the National Office Management Association as represented in Area 3. Will you be one of my jury of consultants and fill in this questionnaire for me? For those companies having more than one representative in N. O. M. A., I am enclosing three copies of the questionnaire. If you would pass the extra copies along to someone else who is more closely connected with the filing systems and problems, I would be grateful. Any information you may give will be regarded as confidential in the sense that names of individuals and of their respective firms will not be listed.

In addition, a questionnaire is being submitted to the heads of the business education departments in the secondary schools to find the status of filing in the business subjects being taught this year. From this I am expecting to find whether filing is being taught, and if it is, to what extent, and what equipment, supplies, and methods are discussed and/or illustrated.

Your cooperation, assistance, suggestions and recommendations will be appreciated.

Sincerely yours,

Martha Wheelers

Enclosure



Brevard College  
Brevard, N. C.  
April 28, 1948

Dear Sir:

Sometime ago I mailed you a questionnaire pertaining to filing in order that I might determine what the businessman thinks should be included in a course in filing. Representatives from those companies having members in the five chapters of Area 3 of the National Office Management Association have been chosen to be my jury of consultants to fill out one of the enclosed questionnaires. This questionnaire is to obtain information for a study I am conducting in partial fulfillment of the requirements for a Master's degree from The Woman's College, Greensboro, North Carolina.

So far, there has been no response from you. I would appreciate it if you will give me whatever information you can so that your firm can be included in this study. Any information you may give will be regarded as confidential in the sense that names of individuals and of their respective firms will not be listed.

Your attention to this matter at your earliest convenience will be most heartily appreciated.

Sincerely yours,

*Martha Wheless*  
Martha Wheless

Enclosure

Questionnaire to the Businessmen

Name of firm \_\_\_\_\_ City \_\_\_\_\_

Name of person filling in questionnaire \_\_\_\_\_

Kind of firm \_\_\_\_\_

Head office \_\_\_\_\_ Branch office \_\_\_\_\_

How many office employees do you have in the office of your local firm? \_\_\_\_\_

How many of these employees perform some filing duties? \_\_\_\_\_

How many of these employees are file clerks (have filing for the major part of their job)? \_\_\_\_\_

Does your firm have a centralized filing department only (main division of files which serve for all offices of the local firm)? \_\_\_\_\_

Do you have an entirely decentralized filing department (each office keeping its own files)? \_\_\_\_\_

Does your firm have a combined centralized-decentralized plan? \_\_\_\_\_

Do you have a supervisor in charge of files? \_\_\_\_\_

If yes,

(a) Does the supervisor actually do any filing? \_\_\_\_\_

(b) What are the other duties of this supervisor? \_\_\_\_\_

Check here the method or methods of filing used in your firm:

Methods:	Used extensively	Limited use
Alphabetic . . . . .	_____	_____
Subject . . . . .	_____	_____
Numeric . . . . .	_____	_____
Geographic . . . . .	_____	_____
Chronological . . . . .	_____	_____
Others (please list)	_____	_____
_____ . . . . .	_____	_____
_____ . . . . .	_____	_____

Please check below the system or systems of filing used in your firm:

Systems	Used extensively	Limited use
Automatic Index . . . . .	_____	_____
Bee Line . . . . .	_____	_____
Direct Name . . . . .	_____	_____
Dewey Decimal . . . . .	_____	_____
Duplex-Numeric . . . . .	_____	_____
Expandex . . . . .	_____	_____
Kardex . . . . .	_____	_____
Leader . . . . .	_____	_____
Library Bureau Direct Alphabetic Index . . . . .	_____	_____

Questionnaire - 2

Systems (cont'd)	Used extensively	Limited use
Natural . . . . .	_____	_____
Numeric Check . . . . .	_____	_____
Mual . . . . .	_____	_____
Perpetual . . . . .	_____	_____
Ready-Made . . . . .	_____	_____
Safeguard . . . . .	_____	_____
Skyline or Direct Vision . . . . .	_____	_____
Sorter Graf . . . . .	_____	_____
Soundex . . . . .	_____	_____
Space-Saver . . . . .	_____	_____
Tailor-Made . . . . .	_____	_____
Tri-Guard . . . . .	_____	_____
Triple Check . . . . .	_____	_____
Variadex . . . . .	_____	_____
Wheeldex . . . . .	_____	_____
Others (please list)	_____	_____
_____ : : :	_____	_____
_____ : : :	_____	_____

Do you think the schools are doing an adequate job of training prospective file clerks? \_\_\_\_\_

Please list any recommendations you may have that will improve the training program for prospective file clerks and other clerical workers in our secondary schools:

File clerks: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Other clerical workers: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

What aspects of filing should be taught in school? \_\_\_\_\_  
 \_\_\_\_\_

In what aspects would you prefer to train your own file clerks? \_\_\_\_\_  
 \_\_\_\_\_

Do you offer an on-the-job training program for the employees who do the filing in your firm? \_\_\_\_\_

If yes, what is its nature and extent? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Do you have an office manual? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, does it include instructions about filing? Yes \_\_\_\_\_ No \_\_\_\_\_

## POSTAL CARD FOLLOW-UP SENT TO NOMA MEMBERS ON APRIL 6

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April 6, 1948

To N. O. M. A. Members:

On February 25 I mailed you a copy of a questionnaire in order to secure information about the filing in your firm for a study I am conducting. I feel sure that your neglect in answering this has not been intentional. If you would look into this matter and help me by giving this information as soon as possible, I would certainly appreciate it.

Sincerely yours,

Martha Wheless

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## APPENDIX II

TABLE I

COMMENTS FROM BUSINESSMEN FOR THE IMPROVEMENT OF THE TRAINING PROGRAM  
FOR PROSPECTIVE FILE CLERKS IN OUR SECONDARY SCHOOLS

1. Young people do not show much interest in filing, resulting in carelessness
2. More actual application
3. Should be taught in more detail
4. Teach alphabet and usual divisions of proper names
5. Apparently, no filing is being taught in local schools. Think students should have elementary knowledge of filing when entering office.
6. Devote more time to all business subjects, including filing, with most emphasis on English, Math and Typing.
7. Teachers and those who plan training courses should make frequent surveys of actual business applications.
8. A file clerk should train for better positions such as typist, stenographer or secretarial, as file clerk positions are not very remunerative.
9. Should teach filing--above all it should be compulsory for every student to take typing.
10. Ingrain accuracy
11. Teach spelling; emphasize accuracy; closer observation; precision. Cooperation; punctuality.
12. Simply learn the basic principles. We have had clerks who did not even know their alphabet; also, one of the biggest weaknesses has been that they have no organization ability or initiative.
13. Thoroughness and emphasis on importance of filing.
14. Teach the above systems and methods.
15. Need more training on visible filing (KARDEX).
16. A commercial high school curriculum should impart at least a good understanding of the basic methods. We have not found this to be the case.
17. Thorough training in alphabetic filing.
18. Not many file clerks realize the importance of absolute accuracy, especially with the Soundex system. A good memory is the greatest asset one filing can have.
19. More emphasis on spelling, shortcuts in alphabetical filing and "charge out" system for control of all papers in and out of the file.
20. More actual practice and use of filing.
21. Have schools secure at least a two-weeks accumulation of actual material filed by a group of representative firms (small 50 to 200 employees for mfg.) etc. Have students study system used by firm furnishing material. Be sure they understand what each paper represents. Then try filing entire accumulation after mixing up completely. After this has been mastered, then let them try to improve system.
22. Actual experience
23. I would suggest that filing clerks be trained so that they could take care of any filing job that was necessary for them to do, instead of being trained solely on the fundamentals of filing itself.

TABLE I (Cont'd.)

- 
24. Companies as large as ours must do a lot of cross filing--should stress that filing should be done the simplest way to find data.
  25. Alphabet and spelling
  26. Consistency of position of filing material; consistency in labeling names of file folders; sequence of filing material relative to alphabetical index.
  27. Teach more sense of responsibility
  28. Papers should be filed each day, not left to accumulate. Also, more individual folders should be used, and less miscellaneous folders. Indexes should be subdivided.
  29. How to concentrate the mind upon the task; how to approach a problem or a job with reason rather than with emotion.
  30. No difficulties experienced
  31. Commercial course
  32. Extreme accuracy should be stressed
  33. Adequate equipment and more trained teaching in filing
  34. Filing is a simple function in our business and requires no specialized training.
  35. Recommend that the Board of Supervisors check closely with industry, in order to learn their requirements.
  36. Many students have learned the alphabet by recognition instead of alphabetic order. Former do not make adequate file clerks.
  37. None
  38. The present method is too general in scope.
  39. Secondary schools should major in the field of English, mathematics, History, Geography as basic training. A training program specifically for file clerks and other clerical workers should be given in high school and colleges--not secondary schools.
  40. Teach responsibility to the job
  41. Better basic courses in English, Math, and other rudimentary education
  42. Better penmanship
  43. Carefulness
  44. Stress the importance of properly filing all papers regardless of their apparent unimportance to the file clerk.
  45. Encourage more students to study filing, as it now pays almost as well as stenographic work. See that they learn the several systems that are used most often. Train them to be neat and accurate in filing.
  46. Practical training to supplement theory.
  47. Those interested in filing, I think the secondary schools that don't have the filing equipment could work through the credit bureaus that do. They may get some cooperation.
  48. Develop proper attitude toward any job. Legible handwriting and clear numerals. Appearance: what should be worn.
  49. More extensive campaign for "on-the-job training" while student still in school.
  50. I believe we need a strictly business administration course which would include filing, etc. Course to include typing, shorthand, bookkeeping, accounting, business machines, also, and should have active support by NOMA.
  51. Care and caution by looking over the matter to be filed
  52. None

TABLE I (Cont'd).

- 
53. Teach them, by some method, any method, where to find information after it is filed.
  54. More time and complete study. Create more interest. More actual experience--for example, allow students to set up and be responsible for school's files
  55. Practice on cross-reference filing
  56. Familiarize them with methods and systems, and the importance of efficiency in filing. Let them know before taking a job how much employers dislike carelessness in filing.
  57. Emphasis on initiative, adroitness and the art of exercising tact with fellow workers
  58. Train in varied types of filing
  59. Importance of keeping files up to date at all times--and not filing only when other jobs are up to date. Teach that the correct place for everything is in its proper place and not in one file this time and in the other the next time. Be sure that the Alphabet is known in correct order.
  60. Familiarity with the alphabet. Memory course and concentration.
  61. Think it would be well for schools to call in a competent office equipment representative occasionally for class lectures in order to keep teaching up-to-date regarding new filing systems and equipment.
  62. Schools as a usual thing do not include filing in their courses.
  63. Do not know, as unfamiliar with program of schools.
  64. Teach all possible systems so student will be adaptable to any and also be able to offer improvements
  65. Work through NOMA Educational Committee or other similar organization of practical businessmen.
  66. Teach need for organization of daily work.
  67. To distinguish between adjectives and nouns in subject filing.
- 
-

TABLE II

COMMENTS FROM BUSINESSMEN FOR THE IMPROVEMENT OF THE TRAINING PROGRAM  
FOR PROSPECTIVE CLERICAL WORKERS IN OUR SECONDARY SCHOOLS

1. Give them some practical experience.
2. Personality development. Cooperation with other employees. Realization that promotion must be earned.
3. Devote more time to all business subjects, including filing, with the most emphasis on English, Math and typing.
4. Teachers and those who plan training courses should make frequent surveys of actual business applications. More emphasis on correct attitudes.
5. Should train for better positions such as typist, stenographic or secretarial, as file clerk positions are not very remunerative.
6. Should be compulsory to take typing.
7. Let them do office work on part-time basis.
8. Permanship--typing, elements of bookkeeping with emphasis on distinction of debits and credits. Fundamentals of business administration.
9. As a rule they are very poor, can't even spell, do not know how to answer telephone, neither do they have any sense about receiving callers.
10. Accuracy and thoroughness greatly lacking in much teaching.
11. Need more training on records that support general ledger: perpetual inventory, sales records, personnel records, payroll accounts receivable, etc.
12. Instill in them necessity for knowing the "why" behind the figures they work with.
13. The greatest difficulty we encounter is weakness in fundamentals--poor spelling, lack of "decimal" sense, deficient English grammar.
14. Importance of accuracy.
15. Suggest more emphasis should be placed on development of proper work habits--promptness, neatness, accuracy in details, regard for company rules, importance of cooperating with others.
16. More actual practice and use of filing.
17. Place more emphasis on plain arithmetic. Many business school graduates of today cannot work 6th grade arithmetic nor spell accurately.
18. Improved spelling and English.
19. Alphabet, spelling and grammar.
20. Better courses in spelling, grammar, and punctuation; actual experience in the most common work in office--like telephone techniques, check writing, etc.
21. More sense of responsibility.
22. More mechanical bookkeeping procedures.
23. How to concentrate the mind upon the task; how to approach a problem or a job with reason rather than with emotion.
24. If possible, students should receive practical training during summer months.
25. Duplicating and computing machines--probably dictating-transcription equipment and work experience.
26. Commercial course.
27. Give sample job training.
28. None



TABLE II (Cont'd.)

- 
29. Recommend that Board of Supervisors check closely with industry, in order to learn their requirements.
  30. Have outside clerical workers attend classes and explain their jobs and perform them for the class.
  31. Teach responsibility to the job.
  32. Better basic courses in English, Math and other rudimentary education.
  33. Better penmanship.
  34. Teach them typing and good penmanship.
  35. Encourage more students to study filing, as it now pays almost as well as stenographic work. See that they learn the several systems that are used most often. Train them to be neat and accurate in filing. Add a good foundation in mathematics.
  36. Practical training to supplement theory.
  37. Develop proper attitude towards any job. Legible handwriting and clear numerals. Appearance, what should be worn.
  38. This course should also include typing, shorthand, bookkeeping, accounting, business machines, and should have active support by NOMA.
  39. None
  40. Practical experience, from my observation, would be most helpful if it could be arranged.
  41. More practice on typing figures. My office practice class at college was carried out as if the professor were our employer and the students were employees. We had to come apply for our jobs, and our grades came from the "amounts of money" she paid us for our work. This created the atmosphere of a real office and made our classes much more interesting. Applying for a job to our professor, for which we dressed as if we were really applying for a job, made interviews with employers much less formidable.
  42. Familiarize them with methods and systems, and the importance of efficiency in filing. Let them know before taking a job how much employers dislike carelessness in filing.
  43. Perfection of shorthand transcripts.
  44. Spelling, fundamentals of arithmetic, typing of figures, filling in forms.
  45. Learn to accept instructions, although they have a business degree-- work as fast as possible and at the same time be sure that what is being done is done correctly and in the correct manner.
  46. Should be trained in a working knowledge of various office machines, such as typewriters, adding machines, calculators, ditto machines, addressographs, mimeographs, and other duplicating machines.
  47. A more thorough knowledge of simple arithmetic and basic English should be stressed.
  48. Efficiency should be stressed rather than speed.
  49. Teach basic work thoroughly.
  50. Work through NOMA Educational Committee or other similar organization of practical businessmen.
  51. Improve basic English and arithmetic.
-

TABLE III

COMMENTS OF THE BUSINESSMEN IN ANSWER TO QUESTION: "WHAT ASPECTS OF FILING SHOULD BE TAUGHT IN SCHOOL?"

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Fundamentals of Filing

1. Fundamental principles of various methods
2. The most commonly used filing systems, alphabetical, numerical, chronological, and geographical.
3. All methods should be taught, with emphasis on alphabetical and numerical
4. Fundamentals: alphabetic, alpha-numeric, alpha-chronological, basic subject, cross reference.
5. Foundation preparatory to using any of above methods.
6. Fundamentals
7. An awareness of the importance of filing modern business papers with an understanding of some of the different filing systems and methods.
8. Demonstration or description of basic filing principles as well as those recommended above.
9. Emphasis on methods rather than systems.
10. Alphabetical, numerical, subject
11. At least the fundamentals of alphabetical and numerical filing.
12. Centralized filing system
13. Direct name--card file, subject, alphabetic, numeric, visible systems, transfer. Rem. Rand pretty good course.
14. The more accepted methods, not just alphabetic.
15. Major systems of filing, and neatness and accuracy in mechanics of filing.
16. Basic principles applicable to wide range of problems in different offices.
17. Most frequently used systems and a familiarity with others.
18. All. Send them out as real file clerks. They will be of more value to employer and also be able to command a better salary.
19. Primarily alphabetic and subject, but all major phases should be understood.
20. Numeric or digit filing, as well as alphabetical.
21. The different systems of filing, how to keep files clean and neat, and how to move the files at the end of the year.
22. General purpose of files; value of finding data promptly; what to consider when filing--no day dreaming.
23. Some thought to filing by subjects.
24. Familiarize them with methods and systems, and the importance of efficiency in filing. Let them know before taking a job how much employers dislike carelessness in filing.
25. Basic principles of all filing systems.
26. Importance of filing--several methods of filing so that when a person starts a new job filing will not be entirely new to him.
27. Alphabetical and numerical since those are the types most in use.
28. General knowledge of filing.
29. All respects.
30. All mechanical aspects and typical applications.
31. The entire subject should be taught because all companies use different systems.
32. A general survey course.

TABLE III (Cont'd.)

- 
33. Types of equipment and use. Correspondence, alphabetic and geographic.
  34. Various systems of filing and accuracy.
  35. Better understanding of filing by subjects and alphabetically.
  36. More emphasis should be placed on what records are actually used in business today and their relation to each other. Also essential that a file clerk or supervisor have complete knowledge of all work done in an office. Should be well grounded in clerical work, accounting, stenographic duties, purchasing and billing procedures.
  37. Combination of record keeping with filing (Unit plan)\*
  38. In my opinion, the alphabetic system is the best.
  39. Fundamentals at least.
  40. Proper method of labeling folders, normal alphabetical divisions.
  41. All possible systems so student will be adaptable to any and also be able to offer improvements.
  42. All they can in the time allotted.
  43. A simple intelligent approach "to put it where you can find it easily when you want it"
  44. Every aspect in order to have the knowledge and background.
  45. It would appear difficult at the secondary school level to go beyond the teaching of basic methods.
  46. For our purposes, training in filing of little value.
  47. Made no studies in this respect.

#### Alphabetic Needs

48. Learn the alphabet!
49. That "B" comes after "A"
50. Alphabetical
51. Alphabet, or a, b, c's.
52. Alphabetical

#### Personality Development

53. Accuracy and neatness
  54. Care and caution
  55. Skill, responsibility and effort
- 

\* This comment was made by an office outfitter who offered the same comment in answer to "In what aspects would you prefer to train your own file clerks?"

TABLE IV

COMMENTS OF THE BUSINESSMEN ON "IN WHAT ASPECTS WOULD YOU PREFER TO  
TRAIN YOUR OWN FILE CLERKS?"

1. The application of the various methods and systems to fit our needs.
2. Our own adaptations of standard systems.
3. To improve their **memory** and always double check before filing.
4. By furnishing a group of subjects to be filed covering wide range of subjects.
5. Probably 75% of offices in this state have a very simple or practically no system. Many of these offices would no doubt welcome an employee who could revamp or set up a simple practical system suitable for their needs. We have found that the usual new employee must spend considerable time with us before they are able to do efficient filing. It is also our experience that very few people like to do filing of any nature. If schools could arouse more interest in the field and put across just how important a good filing system is to business, a definite step forward would have been made. By the same token, business should no doubt pay better salaries for this work than are now being offered generally. The trouble seems to be that few offices need a person full time for this work, consequently, it is usually done along with other duties.
6. In our particular departmental methods.
7. We have certain accounting procedures which are not the same as most offices so we train our own fellows on keeping these records.
8. Specific methods.
9. To conform with our own methods.
10. System
11. Subjects applicable to all business.
12. Fine points.
13. Only how to apply or fit their previous training to our particular system.
14. Our system only. New employees should bring thorough knowledge of fundamentals.
15. Our system is very different from the regular system.
16. Train them alphabetically.
17. Technical aspects of business only.
18. To use the methods and systems used in our business.
19. Maintaining a file system based on present needs, and not a file to have a file.
20. Details of the systems related to actual filing equipment.
21. Record keeping with filing (Unit plan)\*
22. Neatness
23. Importance of records. That filing, not finding systems are wanted.
24. It is necessary to familiarize them with our own methods.
25. Our system is devised to suit our particular needs.
26. All
27. Made no studies in this respect
28. 30-period Rem. Kard plus Kardex
29. Knowledge in alphabetical and numerical filing, contacting public in person and by phone regarding the confidential information which is handled by this agency.

TABLE IV (Cont'd.)

- 
30. Alphabetic, numeric, subject
  31. In specific company methods
  32. This will always be more or less necessary
  33. If properly qualified, only necessary to teach our particular methods and requirements to meet our needs.
  34. Details of our system
  35. Practically 100%
  36. Skill, responsibility and effort
  37. Any variations peculiar to our own business
  38. Our special problems--wide variation in subject matter, decimal system
  39. In our files of over 3/4 million records
  40. In the finer points of application of a system to a specific job
  41. We train them to file according to our system, business and needs.
  42. Believe each firm should teach and train own file clerks
  43. None
  44. "Around the compass"
  45. In filing material peculiar to my particular business
  46. Familiarize them with methods and systems, and the importance of efficiency in filing. Let them know before taking a job how much employers dislike carelessness in filing.
  47. In accordance with present office procedures.
  48. All aspects
  49. Our special system
  50. The peculiarities of the business, terms, names, etc.
  51. After basic filing training, always forced to train on the job.
  52. 100%
  53. System and methods necessary vary with different firms.
  54. In alphabetical filing
  55. Our system only.
- 

\* This comment by an office outfitter was also offered as a suggestion in answer to the question "What Aspects of Filing Should Be Taught in School?"

## APPENDIX III

## TEXTBOOKS AND SUPPLEMENTARY REFERENCES USED IN THE SCHOOLS

Textbooks

Alphabetic Indexing, South-Western Publishing Company, Cincinnati.

Business Filing, Bassett & Agnew, South-Western Publishing Company, Cincinnati.

Clerical Practice, Kirk, Scott, Lurie, The H. M. Rowe Company.

Indexing and Filing Workbook, The H. M. Rowe Company.

Instruction Book for Rowe Filing Practice Set, S. A. Rice, The H. M. Rowe Company.

Methods of Learning by Doing, Remington Rand.

Principles of Indexing and Filing, Cadwallader and Rice, The H. M. Rowe Company.

Progressive Indexing and Filing (Library Bureau), Remington Rand.

Secretarial Office Practice (Filing Unit), Loso and Agnew, South-Western Publishing Company, Cincinnati.

Supplementary Sources

General Business, Crabbe and Slinker, South-Western Publishing Company, Cincinnati.

Elements of General Business (Filing Unit), Polishook, Beighey, and Wheland, Ginn and Company.

Secretarial Office Practice, (Filing Unit), Loso and Agnew, South-Western Publishing Company, Cincinnati.

VOCATIONAL COMMERCIAL CURRICULUMS LEADING TO PROFICIENCY CERTIFICATES  
IN ONE H. S. (WILMINGTON, N. C.)

<u>Vocational Stenographic Curriculum</u>		<u>Vocational Bookkeeping Curriculum</u>	
<u>Freshman Year</u>	<u>Sophomore Year</u>	<u>Freshman Year</u>	<u>Sophomore Year</u>
English	English	English	English
Mathematics	Bus. Arith.	Algebra I	Algebra II
Gen. Science	Biology	Gen. Science	Biology
One Elective	Electives	One Elective	Electives
	recommended:		recommended:
	Gen. Bus.		Bus. Arith.
	Art I		Gen. Bus.
<u>Junior Year</u>	<u>Senior Year</u>	<u>Junior Year</u>	<u>Senior Year</u>
English	Bus. English	English	Bus. English
U.S. History	Government	U. S. History	Government
Typing I	Dict. & Trans.	Elem. Bkbp.	Adv. Bkbp.
Shorthand	O.M. & C.P.*	Electives	Electives
Electives	Electives	recommended:	recommended:
recommended:	recommended:	Typing I	Office Machines
Gen. Bus.	Job Tr. (D.O.)	Shorthand	Job Tr. (D. O.)
Elem. Bkbp.			

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<u>Voc. Gen. Clerical Curriculum</u>		<u>Voc. Calculator Op. Curriculum</u>	
<u>Freshman Year</u>	<u>Sophomore Year</u>	<u>Freshman Year</u>	<u>Sophomore Year</u>
English	English	English	English
Mathematics	Algebra II or	Mathematics	Bus. Arith.
	Gen. Bus.	Science	Biology
Science	Biology	One Elective	Electives
One Elective	Electives		recommended:
	recommended:		Gen. Bus.
	Art I		
	Elem. Bkbp.		
<u>Junior Year</u>	<u>Senior Year</u>	<u>Junior Year</u>	<u>Senior Year</u>
English	English	English	English
U.S. History	Government	U.S. History	Government
Bus. Arith.	O.M. & C.P.*	Typing I	O.M. & C.P.*
Electives	Electives	Electives	Electives
recommended:	recommended:	recommended:	recommended:
Elem. Bkbp.	Typing II	Elem. Bkbp.	Typing II
Adv. Bkbp.	Job Tr. (D.O.)		Job Tr. (D.O.)
	Adv. Bkbp.		

Students with an average of 85 and Seniors may carry five subjects.

\* Office Machines and Clerical Practice.

The following Table is supplied as comparative data on business enrollments in a neighboring state. Twenty-five offices in Virginia participated in the study of filing activities in business offices.

NUMBER OF STUDENTS TAKING COMMERCIAL SUBJECTS  
IN THE  
PUBLIC SCHOOLS OF VIRGINIA  
September, 1947

Compiled from Preliminary Superintendent's Reports  
of Virginia

Number of schools teaching commercial subjects . . . . .	340
Total enrollment of these schools . . . . .	89,449
Number of Commercial Teachers . . . . .	424*
Typewriting I . . . . .	14,456
Typewriting II . . . . .	3,675
Shorthand I . . . . .	4,572
Shorthand II . . . . .	1,199
Bookkeeping I . . . . .	3,987
Bookkeeping II . . . . .	352
General Business . . . . .	3,589
Business Arithmetic . . . . .	2,679
Business English . . . . .	593
Business Law . . . . .	375
Office Practice . . . . .	434
Economic Geography . . . . .	954
Economics . . . . .	277
Personal Typing . . . . .	110
Filing . . . . .	23
Exploratory . . . . .	89
Total . . . . .	37,364

\* This figure does not include 52 teachers who are teaching one commercial subject.