Guidelines for the development of a simulated office experience program

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GUIDELINES FOR THE DEVELOPMENT
OF A SIMULATED OFFICE EXPERIENCE PROGRAM

by
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B.S., University of Montana, 1970

Presented in partial fulfillment of the requirements for the degree of

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Approved by:

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Dean, Graduate School

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INTRODUCTION

The problem is how to provide a meaningful experience in office education. By carefully developing a philosophy and understanding of the simulated office experience program and following the guidelines presented, a teacher will have the basis for instituting a program constructed to meet the needs of the particular teaching situation.

Special recognition is given to Dr. Donald E. Koeppen, Business Education Chairman, University of Montana, and Dr. George J. Brabb, Professor of Business Administration, University of Montana, for profession guidance in the writing of the paper. Acknowledgement also goes to Dr. Hubert R. Breuninger of Business Administration, University of Montana, as a member of the thesis committee.
The Problem

A simulated office experience encompasses a valuable and needed area in vocational education. To provide a realistic and meaningful educational experience that leads to a student prepared to enter and advance in the labor market is a goal of vocational education. One of the most meaningful experiences is to actually work in an office situation that provides a comprehensive look at the forms, functions, facilities and equipment, and procedures used in an office. These experiences are the major advantages of the simulated office experience. The program requires a vast amount of careful planning if it is to be valuable.

Significance

The general disciplines of systems analysis, curriculum development, educational psychology and philosophy, facilities planning, financial planning, materials development, and educational evaluation are included in an attempt to make the guidelines valuable tools for business educators.

Objectives

The purpose of this presentation is to provide guidance for schools in developing an office education experience that will provide a meaningful experience.
The guidelines will help to insure that the program is related directly to employment opportunities. Based on advice from the occupational groups concerned, each student has the opportunity to determine a career objective. Facilities and equipment used in instruction are comparable to those found in the occupation. The instruction duplicates, as nearly as possible, desirable working conditions and at the same time provides effective learning situations. The needs of individual students are provided for. There is a vocationally competent and experienced teacher. Training is carried to the point of developing marketable skills, abilities, understandings, attitudes, appreciations, and work habits; and continuous research and follow-up is an integral part of the program.\(^1\) The guidelines are needed especially for the inexperienced teacher or a teacher with limited office experience.

The Vocational Education Act of 1963 and the Amendment Act of 1968 make it possible for federal aid for vocational training in office occupations. Some of the greatest difficulties in developing programs are that teachers hesitate to try new types of training, there is a large amount of careful planning required, and there is a large amount of preparation needed. Guidelines help to identify teacher characteristics in the school systems which enhance the adoption of educational innovations. This development would enable the selection of programs that will most likely implement the outcomes of student needs. Guidelines help to take the "guesswork" out of planning a program, yet provide unique flexibility in the way that the teacher develops materials and procedures.

CHAPTER II

RELATED LITERATURE

Literature Related to the Purposes and Goals of Vocational Education

What is vocational education? Why is vocational education a challenge to schools and society? What is the relationship of vocational education to general education? What are the concepts involved in vocational education programs? What is the stake of industry in vocational education? Why is it necessary to understand the broad educational area one is working in to adequately plan a simulated office experience program?

There are many definitions of vocational education—as many as people with different ideas. Certain general concepts are in each definition, however. Perhaps the most authoritative is the one established by the Federal Government in the Vocational Education Act of 1963.2

The term "vocational education" means vocational or technical training or retraining which is given in schools or classes (including field or laboratory work incidental thereto) under public supervision and control or under contract with a state board or local education agency, and is conducted as part of a program designed to fit individuals for gainful employment as semiskilled or skilled workers or technicians in recognized occupations (including any program designed to fit individuals for gainful employment in business and office occupations, . . . but excluding any program to fit individuals for employment in occupations . . . to be generally considered professional or as requiring a baccalaureate or higher degree) . . .

The Vocational Amendment Act of 1968 added the following:

... to include remedial or related academic and technical

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2Vocational Education Act of 1963, Public Law 88-210, 88th Congress.
instruction, technicians and subprofessions and individuals enrolled in advanced technical education programs . . .

An Administrators' Bulletin from the Department of Public Instruction for the State of Wisconsin gives a more utilitarian definition of vocational education.

Basically, vocational education is a locally developed plan of education that meets realistically the demands of occupations which are available to high school graduates. Vocational education helps prepare many students for entry jobs, helps lead some students into post-secondary programs of advanced vocational and technical education, and helps serve the culturally deprived or the academically handicapped through specially designed courses or activities.

One of the principal arguments for vocational education is that it is a social necessity. In theory and in fact it represents an individual's turning point from economic dependency upon the social structure to his independent posture as a productive member of society.

Every man, woman and child has the right to obtain all the education he or she desires and is capable of acquiring. Yet, this is not a guaranteed right, as such education must first be made available. This is a challenge to vocational education. The challenge is the responsibility to provide every individual the opportunity to pursue the kind of training that will prepare him to secure a job, and to advance in an occupation in which he can be most successful. Vocational education must be considered as an integral part of a comprehensive high school program for two reasons: first, to provide students not going to college with a skill to earn a living and second, to meet the tremendous manpower needs of agriculture, business and industry.

... a paradox exists, not enough people are trained to operate, service, rebuild, and develop this mushrooming technology. In addition, there is a need for skilled people to supervise and

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4Department of Public Instruction, Administrators' Bulletin on Vocational Education, No. 2.

5Don Pennington, "How Far Have We Come?" The DPI Communicator, Vol. 1, No. 3 (March, 1969), p. 3.
manage employees. These employment needs combined with the
demands of the military establishment present a major challenge
to all agencies concerned with education and training of workers.6

Vocational education cannot conquer all the problems that exist
in our political and social upheaval, but it is a logical place to put
emphasis. Industry has a big stake in vocational education. Youth
from the high schools make up a major portion of the working force.
Since it has been the trend of high schools and parental influence to
prepare students for college, the technicians are in short supply.7

Technical competence is assuredly important, but no more so than
competence in general knowledge in the realm of ideas and their application
to one's chosen occupation. Only within an educational setting is there
hope that these values will be given proper attention and development.
General and technical education must go hand in hand to develop thinking
workers.6

Literature Related to the Implications of the Vocational Education Act
of 1963 and the Amendment Act of 1968

Because of the tremendous impact on vocational education as a result
of the Vocational Education Acts (especially on office education), it is
important to understand the implications and provisions that reflect on
planning for a simulated office. Why is the government interested in
providing for vocational education? How do the Acts contribute to
vocational education? What implication does federal legislation have for

6 Guidelines in Cooperative Education, The Center for Vocational and

7 E. F. Laux, "Keynote Banquet Speech," National Seminar for Cooperati-

8 Grant Venn, Man, Education and Work, American Council on Education
planning an office education program? Can Federal legislation accomplish the task of providing occupational education for all?

The following is a portion of a statement submitted to President Johnson outlining changes in public and private policy prepared by a group of economists, labor leaders, publishers, and others:

We recognize that the drastic alterations in circumstances and in our way of life ushered in by cybernation and the economy of abundance will not be completed overnight. Left to ordinary means of the market such change, however, will involve physical and psychological misery and perhaps political chaos. Such misery is already clearly evident among the unemployed, among relief clients into the third generation and more and more among the young and old for whom society appears to hold no promise of dignified or even stable lives. We must develop programs for this transition designed to give more hope to the dispossessed and those cast out by the economic system, and to provide a basis for the rallying of people to bring about those changes in political and social institutions which are essential to the age of technology.

The Vocational Education Act of 1963 (Public Law 88-210) provides for the maintenance, extension, and improvement of existing programs of vocational education, to develop new programs of vocational education, and to provide part-time employment for youths who need the earnings from such employment to continue their vocational training on a full-time basis; so that persons of all ages in all communities of the state—those in high school, those who have completed or discontinued their formal education and are preparing to enter the labor market, those who have already entered the labor market but need to upgrade their skills or learn new ones, and those with special educational handicaps—will have ready access to vocational training or retraining which is of high quality, which is realistic in the light of actual or anticipated opportunities for gainful employment.

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employment, and which is suited to their needs, interests, and ability to benefit from such training.\textsuperscript{10}

Instead of emphasis on enumerated specific occupations, such as agriculture, definitions were broadened so as to permit training to be tailored to the occupational needs of today. A cooperative program and a work-study program was authorized, and states were to be given money on a matching basis for the funding of state-approved vocational projects. Collectively, the purposes add up to one thing: to insure that vocational training is preparing for today's jobs in a specific community.

The amounts of money provided for in the Acts are significant, but not enumerated in detail in this presentation, because the amount of the total allocation is not of as much concern to the teacher applying for a project as to the state director handling the funds. In selling the program to the administration, however, it is important to know the matching requirements. These requirements differ from year to year and from state to state.

To appreciate the comprehensive approach of the 1968 Amendment Act, one must read the Act to understand its implications, Senate Report No. 13\textsuperscript{t} and House Report No. 1647 and No. 1938.\textsuperscript{11} Copies of the Vocational Education Act of 1963 and the Amendment Act of 1968 are available from any State Department of Public Instruction.

Although the federal government can provide some stimulus, particularly by more effective leadership and emphasis on vocational education in the United States Office of Education, the total value rests in direct proportion to the interest of the business community in the program. The success can

\textsuperscript{10} Congressional Record, Proceedings and Debates of the 88th Congress, First Session, Vol. 109, No. 205 (December 13, 1963).

\textsuperscript{11} Congressional Record (December 13, 1963).
be justified only on the basis of developing marketable skills. Experience has shown that the federal government can stimulate such programs, but it cannot provide such skills through legislation and dollars.

Literature Related to the Purposes and Goals of Business Education with Implications for Curriculum Planning Needs

What is the purpose of business education? What is the scope of the business education curriculum? What are the elements of instructional planning used in business education? What are schools using as criteria for developing the business education curriculum? What specific studies for business education program development are available? What modern assumptions in the business curriculum are used? What is the effect of automation on the business education curriculum? These are questions to keep in mind as the scope of the area we are working in narrows to a particular field. Business education, in summary, then is preparation for specific business positions, personal competence, background for advanced training, and a vital part of the total vocational program.

In most schools the business education department will present classes in shorthand, typing, bookkeeping, office practice, office machines, business law, economics, distributive education subjects (retailing and marketing), business mathematics, record keeping, business English, and data processing. Any combination or some additions or deletions are made to fit the individual needs of the schools. This paper is particularly concerned with office education.

Business and office education, ... are not synonymous with basic business education, which is needed by every consumer of the products and services of business and which is essential for an economically literate society. A strong business and office education program is the friend of basic business education. If
the latter is needed by everyone, it is doubly needed by the office worker.\textsuperscript{12}

Of interest are characteristics of a laboratory experience that is a functional definition made by John D. Lee, Supervisor of Business and Office Education for the State of Indiana.

The "now" in business and office education.

1. In atmosphere, layout, and equipment, the office laboratory is fully comparable to a modern, well-designed, functional business office.

2. Experiences are provided through the lab in which exercises and problems involving the application of knowledges and skills will be an integral part of the learning experiences, and also in which the instruction will center in the performance of production tasks on actual occupational and educational projects which are brought into the laboratory from outside agencies or from within the school rather than a textbook or practice set.

3. The program is directly related to employment opportunities and has course work set up and maintained with advice from the occupational groups concerned.

4. There is a statement of career objective for each student that is a matter of record.

5. Instruction is offered only to persons who need, desire, and can profit from it occupationally.

6. Each student in the office laboratory is required to perform a variety of major tasks which comprise the office occupation for which the student is preparing.

7. The length of instruction is determined by the requirements of the occupation and the needs of the students.

8. Each student performs actual office activities as an individual, while under office pressures, and not as a group.

9. Grade requirements are equal to actual job standards.

10. Instruction is provided on an individual basis and thus can provide the above average a higher degree of proficiency and technical education as well as offering the below average an employable skill.

\textsuperscript{12}Lee, Business and Office Education, p. 1.
Mr. Lee contrasts this to the traditional classroom approach that has the following characteristics:

1. All students are doing the same thing at the same time.
2. Materials and projects come from published textbooks and practice sets.
3. Mostly developing basic skills rather than applying skills to an office situation.
4. Length of instruction, no matter what the career objective of the student, is usually the same for all.
5. Lacks office pressure, and so the student usually enters private schools for additional training.
6. The classroom doesn't bridge the gap between the school and the world of work.
7. Equipment mainly of the same make rather than of the variety found in the business office.
8. Usually a course and not a program of instruction for immediate and gainful employment: presents much "how" and lacks "why" something is done.
9. Usually represents general preparation for a job rather than preparation for a career.
10. Course work is not maintained with advice from occupational groups or according to employment opportunities.
11. The classroom doesn't provide technical training for the above or below average student but the middle-of-the-road approach.

Office occupations courses are offered far more extensively than other business courses; about 1,800,000 students are enrolled. A significant but unknown proportion are enrolled only for semesters and take programs for avocational purposes, i.e., typing. Secondary schools employ more than 60,000 business education teachers, compared to 37,000 teachers engaged in all the federally aided vocational programs. If current trends continue, 27 percent or nearly 3 million new jobs will 

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be available and 400,000 new workers are needed annually as replacements in this high turnover field.  

The business education department works with the community through community surveys; recognizes and utilizes existent community resources to enrich the curriculum; visits local offices, factories, and stores; and the faculty works as a business advisory.

For purposes of this discussion, the term curriculum has to be considered as the sum total of the student's experiences and activities under the direction of the school, or specifically, the business education department, including teaching materials and methodology.

A business and office education curriculum is defined as a sequence of learning experiences designed for the attainment of employability and satisfactory job performance on the part of the students in a family of business and office occupations or in a specific occupation chosen as a career objective by the student. The learning experiences are provided through general education subjects, economics and principles of business, and specialized technical business and office education subjects.

Literature Related to Meeting the Needs of the Modern Office Worker and Occupational Guidance

The work of the office is an important aspect of the total productive effort, not only because of the nature of the work performed, but also because of the numbers of persons who have chosen office careers. In obtaining a broad overview of the needs of the worker in the modern office, it is important to keep the following questions in mind and develop a philosophy concerning what to teach so that students are adequately prepare

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14 Grant Venn, Man, Education, and Work, pp. 80-81.
for entry-level occupations. What is the demand for clerical or secretarial workers? What is the difference between a clerical and secretarial occupation? What jobs will be available to high school graduates? How can office practice provide necessary experiences to develop basic skills? What skills and aptitudes must be taught? What does business expect of the graduate? Will the computer replace the clerical worker? What clerical and secretarial related applications are affected by data processing? How can vocational education receive the status and prestige to perform its vital and proper role in a technological society? What is the role of vocational counseling?

The number of clerical workers in the United States has been increasing rapidly at a rate disproportionate to that of the total labor force. In 1950 about 7 million or 12 percent of the country's labor force of 57 million were employed in clerical occupations.\(^{15}\)

As of September 1966, the United States had over 3.5 million male clerical workers and 8.4 million female clerical workers. The work force of about 12 million clerical workers is approximately 16 percent of the total labor force of over 74 million.\(^{16}\) Projections outlined in the Occupational Outlook Handbook indicate that this trend will continue at least until 1975, as indicated by the following statement:

Employment in clerical occupations is expected to rise very rapidly during the 1965-75 decade. As employment rises to meet the needs of an expanding economy, it is anticipated that more than 300,000 new positions in clerical and related occupations will be added each year. And an even greater number of clerical workers will be needed each year to replace those who retire or leave the job for other reasons.


As industry demands increasing vocational and educational competencies in employees, it is necessary that vocational education become oriented to occupational needs and demands. In the *American Business Education* Yearbook of 1959 that concentrates on the clerical program, some interesting points to consider are brought out.

The difficulty of exploring, to any great extent, requirements in the clerical occupations may be indicated by the fact that the *Dictionary of Job Titles* lists over 1,500 separate job titles under the classification of Clerical and Kindred Workers." Under the combined categories of "General Clerk" and "General Office Clerk," more than 100 different job titles are listed.

In addition to the problems presented by the great number of clerical job titles, are problems presented by the great variety of duties and responsibilities that are implied by the various classifications. Such duties and responsibilities may range from those of sorting clerk, who needs a high degree of motor and perceptual ability, to those of an administrative assistant, who needs a high degree of intelligence, information, skill and versatility--enough in some cases to manage an entire organization during the absence of the chief executive. Even in a firm of moderate size, the duties of a single clerk may comprise a large variety of separate tasks that, in turn, could be broken down into dozens of mental, sensory, and motor skills.17

In order to meet the needs of the modern office worker, the following should be kept in mind:

The terms salable skills, marketable or employable skills are becoming mentioned more frequently in discussions dealing with comprehensive high schools as well as vocational schools. There is no longer an outlet for those without employable skills. A person must attain a level of educational proficiency so that he is prepared to enter some occupation after leaving school.18

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components:

1. Begin working with youth with respect to building a favorable image and attitude toward the world of work.

2. Develop a more realistic approach to career planning or providing education experiences which would be highly relevant to the world of work and job requirements and, especially, to provide those relevant educational opportunities for people of all ages and throughout the entire career life pattern.

3. There should be the establishment in each community, preferably as a part of the ongoing education system, a coordinating job placement service providing for planned and efficient job entry for young people and opportunity for upgrading throughout life, a placement service bridging the gap between the education system and the world of work. After initial placement the school system must continue to provide services whereby the employee can efficiently re-enter and efficiently re-educate himself for upward mobility in a successful career building pattern.19

Office work generally consists of eight types of activity including typing, preparation for duplication, filing, record keeping, telephoning, machine operation, dictation, transcription, and miscellaneous activities. In an extensive research project completed by the School of Education of the University of Connecticut, there were several specific findings about the relationship of data processing to the office education curriculum.

The use of electronics to process data is an important facet of the economy system in the United States, and office workers must be prepared to understand and cope with the way information systems work.

1. The educational institutions are not preparing enough persons to meet the demands of business.

2. Communication skills, both oral and written, are demanded of data processing personnel.

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19Rocky Mountain Educational Laboratory, Between Education and the World of Work (June, 1968), p. 25.
3. Data processing personnel need to be oriented to the total systems approach to business.\(^{20}\)

Carolyn Godby completed a study that was to identify the opportunities and requirements of the workers in the business data processing occupations and determine what changes might advisedly be made in the business education program. She interviewed 21 businesses representing large, small, and medium in areas of manufacturing, wholesaling, retailing, service, and finance. She concluded that the entry-level positions were key-punch operator, file clerk, verifier operator, sorting machine operator, data typist, and teletype operator. Jobs which are customarily promotional include lead key-punch operator, tabulating machine operator, tabulating machine supervisor, tabulating record control clerk, card-tape-converter operator, and tape librarian.

Basic typewriting skill is usually essential and calculating is helpful. Employers recommend training in math and basic communications, accounting and bookkeeping, and preparation of statistical reports.\(^{21}\)

Many offices have been slowly introduced to the scientific management so prevalent in factory and plant areas. As a result, today there is evidence of a rapidly changing atmosphere in the office. There is an intensive need for organization to produce information faster and more accurately. Specialization has come to the office, also, which means that one person may do a routine continuously. In order to feel important, it is necessary for the worker to see his job in relation to the entire


system. Systems analysis must be used in the development of a simulated office experience to insure that students will receive comprehensive training that will not be misleading.

The flow-of-work approach is an essential characteristic of a simulated office experience, consequently, it is necessary that the initiator of the program understand the answers to fundamental questions relating to the cluster concept, systems analysis as an aspect of training, and the basics of information systems.

The clerical worker must now have an understanding of the relationship and working processes of several departments of the company. She can now see paper work in general and her paper work in particular as a means to an important end rather than as a mass of red tape.22

The cluster concept is a descriptive term applied to a form of vocational education directed toward the preparation of individuals for entrance into a spectrum of occupations. The occupations selected for a "spectrum" or "cluster" are those found to require the same proficiencies in a number of areas, namely, measurement, communications, mathematics, science, skill, and general information. With this program there is a greater degree of occupational exploration on the part of the student, there is opportunity to gain sufficient skill and understanding for job entry as well as the background to enable him to effectively appraise his interest and potentialities. The modern office worker needs this multi-occupational direction.23


Industry needs workers who are flexible, workers who have a field of skills and basic education that will enable them to adapt rapidly to occupational change.24

Meeting individual needs of the modern office worker is important. It is an alert vocational educator who recognizes that all students are not at the same stage in their development when they enter a capstone course. In attempting to achieve the desired outcomes for the learner in any educational program, the teacher must recognize that outcomes for all levels of students will not be achieved by the same means.

In program development, concern must be given to the high achiever as well as the potential dropout, and teacher education programs must be planned accordingly. But teacher education may seem unrealistic if teachers are trained to cope only with the ideal situation, and programs may be unrealistic if their design is limited to serve only the very few whose sights are clear, whose problems are few, and who fit all the images demanded by business.25

Edward Joseph Shoben, Jr. says that learning rests essentially on three propositions:

First, a primary objective is more the development of strong motivation for ongoing learning throughout life than the mastery of particular subject matter.

Second, a major degree of attention must be focused on the methods of learning—defining problems, gathering evidence, making inferences, and applying previously acquired generalizations. To this end, heavy emphasis must be laid throughout the school years on such symbolic skills as language and mathematics.

Finally, curricular content can be generated from an analysis of the fields of human knowledge into sequence in which each student must master prior steps before proceeding at his own pace to later ones.26


In considering how to meet individual needs, the problems of the disadvantaged are pointed up by Byers.\textsuperscript{27/28} There needs to be more research completed on how to provide for the exceptional student. Business education has traditionally trained the average and tried to provide additional stimulus for the advanced and disadvantaged. The Vocational Acts have laid particular stress on the disadvantaged student.

Exceptional students must be taught more economic concepts and prepared to be executive secretaries where a great deal of decision making and background is required. Special projects must be required asking them to analyze situations and improve them, survey businesses for a particular educational need, etc. The average student will be challenged according to his ability. The disadvantaged should be trained according to his capabilities.

**Literature Related to Programs Offering Realistic Experiences in Office Occupations Training**

There are many different words and phrases used to describe types of office practice courses and the methods they use. Some of the major ones are conventional classroom, intensive laboratory, model laboratory, simulated work experience, cooperative education, secretarial practice, clerical practice, school secretary, project, practice set, intern, work experience, observation, apprenticeship, and general office practice. Basically, there are three major types of methods being used in capstone courses—work experience, project in structured classroom, and simulation.


This section of the related literature is designed to acquaint the office practice course of study developed with what teaching concepts will best accomplish the objectives, what is the nature of work incentives and attitudes that students use as a basis of learning, what the relationship of the simulated office experience is to other capstone courses, and how a teacher's preparation can be improved for work in a laboratory-type experience.

Structured office class.—Kosanovich advocates a general approach and a structured class and to do away with fancy terms and operations. He says that the specialists' approach taught around a specific situation or modeled on a specific area of employment presents limited activities and methods of instruction to one situation or area of employment.

A general practitioner starts with the basic rules and moves from that point. With office practice, too, the basic rules are all-important. They make for a comprehensive foundation for any circumstance in the business world. These rules do not change with any office situation; consequently; having been learned by the student, these rules will place the graduate in an enviable position in the business world. She might lack speed on a particular machine, but a week's experience will correct this.

Although there is no need for the class to be set up like an office, there is no reason why the students shouldn't act as if they were office personnel and perform on a businesslike basis. This instills good habits and permits the students to work and cooperate with each other. Students should be permitted to talk within their own group and even with students outside their activity, if the conversation is restricted to class business.

The fundamentals do not change. Office situations are as varied as their number.

Simulated experiences.—The Department of Public Instruction in Madison, Wisconsin, distributed a bulletin listing the following examples

of "simulated" experiences which might be provided in approved vocational education programs on the high school level.

Nine weeks of on-the-job experience one or two hours per day. Preparation of and/or handling of business forms actually used. Transcribing dictation recorded in a local business office. Students actually perform jobs taken from work in local office. Students spend one or two days each semester in working with or observing a local employee in the performance of his job. Students are assigned to teachers in the school to work as assistants or aides, providing a variety of experiences. Businessmen come into the classroom and give dictation to be transcribed and mailed out. Students form and completely operate a business organization and perform a service function in the local school. Students develop a product, cost it, produce it, and merchandise it on a break-even or small profit basis. In-class assignments parallel as closely as possible work assignments on job situations. Students run an odds 'n ends sale in a vacant store building. Students promote a school function.30

Work experience.--

The pupil is hired as a producing worker, learns how to do the specific job, and does not necessarily understand the relationship of his job to his classroom activities. The jobs are usually of one type, and he receives little assistance in development. The student attempts to maintain a work and school schedule too demanding. He does earn money which may be important for his staying in school.31

Cooperative program.--

The student is hired as a learning worker to find out "why-it-is-done." He engages in classroom activities which are integrated with his on-the-job experiences, and follows a planned training program at work. The student is given an insight into his need and abilities for taking additional or specialized training and encouraged to remain in school to increase his competency. The student is assured of working in an establishment that is continuously approved by the coordinator and follows a reduced schedule of school activities. He receives compensation.32

30Department of Public Instruction, Madison, Wisconsin.


32Kozelka, "Work Experience," p. 27.
The project method.—

The project method might be defined as being a method of instructing centered around meaningful individual or group activities of educational value, generally involving investigation and solution of problems, and frequently involving the use of equipment.33

Programs in operation.—Nathan Baltor explains his program at John Jay High School in Brooklyn, New York, in which his office practice class operates a business service.

I think of it as a service plan program. Basically our secretarial and clerical practice students do as much useful and practical work as time permits. Last term our seven classes did over a thousand stencil or spirit duplicating jobs for the school. They do have homework, assignments, class lessons, and take tests. No other class organization would possibly justify the quantity of supplies our classes consume. Any equipment if reasonably new and working is good.34

In the Dayton Public Schools, office laboratories are used for any 10th grade student (boy or girl) of low-average ability (I.Q. range generally 80 to 92) who in grade 9 was identified by trained personnel as unlikely to succeed in the vocational-technical program is eligible for this program. Students who are qualified for the special education academic and work-experience programs (I.Q. below 80) are not eligible. In this school the office occupations laboratory is for those who do not profit from the instruction in traditional academic and vocational programs. They do not qualify for cooperative programs, but get successful experiences which lead to employment in jobs known to exist.35

33Ronald Buchanan, "Bring the Office to the Classroom," Typewriting News (Spring, 1969), p. 7.


Anne Weinerman suggests teaching practical "thinking units" to a secretarial class.

The new curricula should include "thinking units." Practical business problems may be suggested, and each student would be responsible for intelligently reasoning the problems through. These problems may span the gamit from personnel relations to decision making. They should include the secretary's answer of mail, arranging mail in the order of priority . . . and so forth. These units should afford the student the opportunity to demonstrate her initiative, creativity, intelligence, resourcefulness, and business acumen.36

Practice sets can be used if there are a variety of office jobs applicable to today, and there are clear instructions that require some thinking and problem solving on the part of the student.

Probably one of the most outstanding simulation programs in operation, using mobile units, is through the auspices of Garth A. Hanson and H. Robert Stocker at Utah State University. Each student participating has a position, and a flow of work is provided. By having mobile units it helps to overcome the lack of expensive equipment and adds a "specialty" touch.37

Directed learning education.--This program was designed to give vocational office students the opportunity of working in a real office on the high school campus. The students are placed on the job and supervised by the coordinator in much the same way as the cooperative office education student.38


Summary of Related Literature

The review of related literature sets the stage for developing the simulated office experience program. It provides the general background needed to make sure a basic understanding of major areas--vocational education, business education, office education, federal legislation, the needs of the modern office worker, and the experience-oriented program--of education involved have been briefly reviewed.
CHAPTER III

PROCEDURES AND METHODS USED TO DEVELOP GUIDELINES

To develop the guidelines for a simulated office practice program presented in this thesis, there were three major methods of information gathering used.

Method I: Questionnaire

The major purpose was to obtain individual ideas relating to a simulated office situation based on the premise that it is difficult for one person to think of every aspect. Secondary reasons were to get ideas from inexperienced and experienced teachers on the practical problems and "tricks of the trade" that may be involved. It was desired to obtain a consensus of opinion as to the most workable approaches to simulation.

The questionnaire consisted of five pages with 22 subjective questions requiring decisions and planning of answers on the part of participants. A copy of the questionnaire is included in the appendix. A total of 36 educators were consulted. Tables 1 through 5, below, provide information on the background of participants. Chapter IV presents an analysis of the data.

Method II: Systems Analysis

The purpose of the systems analysis method was to determine the typical flows that exist in offices, to determine the unique flow of information that is characteristic of a particular type of office situation and a
### Table 1
**EDUCATIONAL LEVEL OF PARTICIPANTS**

<table>
<thead>
<tr>
<th>Educational Level</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Students</td>
<td>10</td>
</tr>
<tr>
<td>Bachelor's Degree Plus</td>
<td>17</td>
</tr>
<tr>
<td>Master's Degree Plus</td>
<td>8</td>
</tr>
<tr>
<td>Doctorate</td>
<td>1</td>
</tr>
</tbody>
</table>

### Table 2
**TEACHING EXPERIENCE OF PARTICIPANTS**

<table>
<thead>
<tr>
<th>Experience Level</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Years of Experience:*</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>10</td>
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<tr>
<td>1-5</td>
<td>12</td>
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<tr>
<td>6-10</td>
<td>6</td>
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<tr>
<td>11-20</td>
<td>6</td>
</tr>
<tr>
<td>20</td>
<td>2</td>
</tr>
<tr>
<td>Level of Education:*</td>
<td></td>
</tr>
<tr>
<td>Secondary</td>
<td>23</td>
</tr>
<tr>
<td>College</td>
<td>4</td>
</tr>
<tr>
<td>Vocational School</td>
<td>4</td>
</tr>
<tr>
<td>Business School</td>
<td>1</td>
</tr>
<tr>
<td>Simulated Classroom Experience:</td>
<td>9</td>
</tr>
</tbody>
</table>

*List by categories does not equal the total of participants, because some educators have had experience in more than one area.
Table 3

OFFICE EXPERIENCE OF PARTICIPANTS

<table>
<thead>
<tr>
<th>Experience Level*</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Years of Experience:</td>
<td></td>
</tr>
<tr>
<td>0-2</td>
<td>22</td>
</tr>
<tr>
<td>3-5</td>
<td>10</td>
</tr>
<tr>
<td>+5</td>
<td>4</td>
</tr>
</tbody>
</table>

Type of Office Experience:

<table>
<thead>
<tr>
<th>Type of Experience</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secretarial</td>
<td>17</td>
</tr>
<tr>
<td>Accounting</td>
<td>11</td>
</tr>
<tr>
<td>Clerical</td>
<td>11</td>
</tr>
<tr>
<td>Administrative</td>
<td>4</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
</tbody>
</table>

Table 4

GEOGRAPHICAL REPRESENTATION

<table>
<thead>
<tr>
<th>State**</th>
<th>No.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
<td>1</td>
</tr>
<tr>
<td>Colorado</td>
<td>2</td>
</tr>
<tr>
<td>Florida</td>
<td>1</td>
</tr>
<tr>
<td>Louisiana</td>
<td>1</td>
</tr>
<tr>
<td>Maine</td>
<td>1</td>
</tr>
<tr>
<td>Minnesota</td>
<td>1</td>
</tr>
<tr>
<td>Mississippi</td>
<td>2</td>
</tr>
<tr>
<td>Montana</td>
<td>18</td>
</tr>
<tr>
<td>New Jersey</td>
<td>2</td>
</tr>
<tr>
<td>New Mexico</td>
<td>1</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>2</td>
</tr>
<tr>
<td>Washington</td>
<td>2</td>
</tr>
<tr>
<td>Wisconsin</td>
<td>2</td>
</tr>
</tbody>
</table>

*List by categories does not equal the total of participants. Some participants have experience in more than one area.

**Twelve states operating under the guidelines of different state departments of education were represented.
particular type of office occupation. A workable system of analyzing data in use in the office was developed and is incorporated in the guidelines on how to make a survey of the local business.

Business managers and their selected representatives from the office staff of eleven businesses were interviewed. See Table 5. They were asked before the interview to have a copy of all forms that originate with, cross their desk, or are outputs of their job. A taped narrative of procedures was taken. From the transcript of the tape, a micro flow of the work was produced. Several departments or people were interviewed. Then a macro flow showing only where the paper originated, who processed it, and where the final information ended up was made and verified by management.

A written narrative was developed using the tapes and flowcharts. This narrative made it easy to follow the flowchart. It explained in detail, and special problems and additional information too lengthy to put on the chart were stated.

After the flow of work was produced, a set period of time (one day in the case of this particular study) was set aside to watch what happened and log all the interruptions and exceptions that appeared. From this list, it was possible to make a master list of interruptions and exceptions that the teacher may inject into the daily routine.

No interview sheet was used, because voluntary supply of data was needed. Only a basic interview was held with the employer to get a second view of what is actually going on in the office. Sometimes, there are conflicting views of procedures between management and the clerical and secretarial staff.

Questions, such as, where did the form come from, where do you get the information to complete the form, who approves the form, the number
and distribution of copies, who uses the information, and do you have any ideas on how to improve the system were asked. Policy statements sometimes have to be written from informal agreements or oral understandings. Organization charts and general company policies can be provided by management. Additional details are incorporated in the guidelines.

Table 5
AREAS REPRESENTED IN THE SYSTEMS ANALYSIS STUDY

<table>
<thead>
<tr>
<th>Occupational Area</th>
<th>Reason Why Selected - Extent of Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>medical</td>
<td>one girl office, pool</td>
</tr>
<tr>
<td>insurance</td>
<td>small staff, chain affiliation</td>
</tr>
<tr>
<td>accounting</td>
<td>automation, service bureau</td>
</tr>
<tr>
<td>lumber</td>
<td>structured departmentalized work</td>
</tr>
<tr>
<td>retail</td>
<td>definite organizational chart, specialists</td>
</tr>
<tr>
<td>banking</td>
<td>executive secretary, specialists, automation</td>
</tr>
<tr>
<td>government</td>
<td>unique system of purchasing and accounting use of manuals for procedures</td>
</tr>
<tr>
<td>law</td>
<td>specialized material</td>
</tr>
<tr>
<td>real estate</td>
<td>specialized material, public relations</td>
</tr>
<tr>
<td>manufacturing</td>
<td>unique payroll procedures, shipping, inventory</td>
</tr>
<tr>
<td>school</td>
<td>many unique departments</td>
</tr>
</tbody>
</table>

NOTE:
In addition to the actual systems analysis work, I relied heavily on personal experience gained from having worked in many different offices, and I depended on teaching experience in considering workable flows for the classroom.

When developing the program for students, it is important that the coordinator of a simulated office experience program understand the principles of education and office management; because time and difficulty of procedures will require that certain steps be omitted or rearranged.

Method III: Resource Material
First, relative magazine articles that were available in the local University library were read. It will be found that most are general in
nature, but interesting ideas may be obtained from procedures found to be successful by other teachers. Business education publications are the best source. House organs of business are excellent sources of reference material.

The second phase of the research operation was to consult the library's card catalog section for books that related to vocational education, data processing, clerical and secretarial office practice, teaching methods in business education, curriculum development, and secondary education in general. From a review of these books, a philosophy and objectives were available. A card catalog of 3 x 5 inch index cards provided reference to specific problems that might arise and can be available for future reference.

The third phase of the research project was to collect texts that cover the disciplinary areas to be incorporated into the program. From the information obtained on the various phases of office occupations, a course outline was developed. After this, a number of practice sets were gathered covering the areas of business machines, payroll, filing, data processing, bookkeeping, and typing. These included a number of representative businesses. Specialized sets such as legal, medical, corporation, partnership, retail, and wholesale were selected. By looking carefully at the materials, a list of forms and procedures was obtained.

The fourth step was to write for as many brochures as possible from business machine companies, so it was clearly understood what equipment is now in use, what applications they have, and prices for references when making purchases. At the time that this phase is being completed, supply catalogs were obtained.

The fifth step was to obtain as many copies of state plans for vocational education as possible. These were reviewed for funding methods.
CHAPTER IV

ANALYSIS OF DATA

In this chapter, the information obtained from data gathering is presented.

Findings of Questionnaire

Need for guidelines. — Comments appeared to show that as a basis for realistic planning, guidelines were mandatory for teachers with limited office or teaching experience and valuable for all teachers.

Organization. — Most participants concluded that it would depend a great deal on the size of the class involved, that it might be wise to initially start with one office and build the program, and it would depend on the type of business and the business situation that was to be simulated. An organization that provided for four basic divisions was the majority response with alternatives of from three to five depending on the size of class involved. Those experienced in programs of this nature felt that four provided the best teaching situation. Most participants felt that using one company provided the easiest organization.

Steps to take in setting up program. — To base the setup on community needs was the most frequent response. In order of importance were the following comments:

Determine the subject matter to use.

Determine the time schedule for the various phases of the program.
Proper organization must be laid out to insure smoothness.

Determination of student needs requires careful consideration and research on the part of the instigator of a program.

Determine the philosophy, purposes, and objectives and the clear understanding of how to implement them in the program.

An initiator of the program should spend as much time as possible in the research and planning phases of the program.

Estimated time needed by a teacher to establish the program and the best way to get this time.--The opinions revealed no definite majority answering the question in a particular way. Answers with nearly-equal responses included part of the summer with pay before the regular school year starts and after it ends, one year of one hour per day released time, three to six month's total released time, and one semester of one hour per day released time. The need for college workshops or course work was felt to be important. There was general agreement that there should be released time during the first year of operation to see that the program gets off to a good start.

Areas of difficulty perceived in establishing the program.--The following answers received a definite majority of responses. They are in order of importance:

Setting up realistic, complete, and understandable procedures.

Obtaining sufficient equipment and facilities.

Coordination of activities and obtaining time to prepare.

Cooperation of administrators.

Establishment of clerical and secretarial work experiences as two separate units or incorporating them into one.--If classes are over 25, students could be put into separate classes; otherwise, the information is not different enough to warrant separate classes. The instructions could include
statements that those who could take shorthand would use that technique
while others would utilize the voice-dictation equipment. It should be
noted that both secretarial and clerical students need to understand the
use of voice-dictation equipment. Both programs progress pretty much
individually, so there is no particular conflict. Most curriculums will
provide for only one course in office practice; and, in a regular work
situation, the two programs would be combined.

Assignment of students.--The majority felt that to make the program most
comprehensive, each student should be rotated in each position in each office.

Minimum prerequisites.--The conclusion was that typing and shorthand
(for secretarial students) are necessary. It is desirable for students to
have training in general business and office machines and possess personal
attributes that insure cooperation and the proper functioning of the program.
A "C" grade point average is important prior to entry.

Equipment.--Typical equipment of the jobs that students will be entering
should be provided. The school funding will most likely dictate what is
available or can be purchased or leased. Following is a list of equipment
in the order of its importance to the program as established by answers to
the questionnaire:

1. typewriter 7. telephones
2. duplicator 8. tape recorder
3. calculator 9. keypunch
4. adding machine 10. sorter
5. dictation-transcription machine 11. accounting machine
6. files 12. standard office furniture

Evaluation.--From responses, it is concluded that teacher observation is
probably the most effective evaluation technique to use. Some objective skill
grade should be provided. Self-evaluation is important so the student can
realistically appraise his interests, aptitudes, and abilities. An essay at the conclusion of the project may provide insight as to the general understanding of the student.

To evaluate the program, every aspect must be considered in its individual parts and as a total to make sure that it was adequate and to make any changes that need to be made for the coming year. A follow-up study of graduates would be one effective means of evaluating the program. It would also be helpful to review it in detail with the advisory committee.

Importance of advisory committee.—The answers to this question revealed that 33 participants felt an advisory committee was needed for the following reasons:

- Teacher not full time on a business job.
- Pre-study jobs available in the community.
- Provide field trips and speakers.
- Service clubs sometimes will donate equipment and supplies.
- Resource people and public relations.
- Different points of view will improve the program.
- To make sure the simulation program is realistic.

Length of time devoted to the program, general and work experience.—The answers to these questions were almost as varied as the number of business educators completing the questionnaire. It was concluded that the course would last one year and be placed in the senior year of school. Assuming that a proper background had been developed, the most popular answers were one to two weeks getting ready for the work experience program and learning the flow-of-work approach, etc., one day to one week specific orientation to the job itself, and 18 weeks or one semester of actual work experience.

Objectives.—The objectives that the business educators wrote on their questionnaires include the following in the order that they received the most responses:
Develop job entry-level skills, attitudes, and knowledges.
Provide a realistic office situation.
Learn the relationship of procedures used in business, equipment, forms, and flow of work.
Provide occupational guidance through use of different offices.
Give experience in working in a group and getting along with each other.
Learn grooming and work habits.
Learn techniques of application for office job.
Develop an awareness of maturity and responsibility involved.
Meet the individual needs of the student.
Bridge the gap between school and work.
Learn problem solving, planning, execution, and appraisal.

Advantages and disadvantages comparing simulation to other programs.

It is difficult to compare the programs used to teach office practice, because each has unique advantages and disadvantages; and in many instances, the functions and operations overlap to some extent. The following list of advantages and disadvantages were felt to be the most important and are listed according to the number of responses received:

Advantages:

More comprehensive.
Controlled learning.
May be more realistic.
Taxpayers feel training is in the school and not left up to business.
Work experience gives no directed learning as simulation does.
Good background for cooperative program if it is in curriculum.
Definitely needed in small towns where work stations are limited.
Better for encompassing lower-ability students.
Individual attention to weak areas of competence can be provided.
Provides experience in running an office.
May be less expensive, no travel and observation time needed, and more convenient to have students under the roof of the school.
Classroom gives no real practice if typically a textbook situation.

Disadvantages:

Cooperative program is more meaningful and realistic.
Student earns no money.
Difficult to simulate pressure, fatigue, various groups of workers.
Difficult to coordinate materials, procedures, and time.
Business and the community not as deeply involved as cooperative program.
Poor teacher could give busy work.
Requires a lot of equipment.
Occupational areas covered.—Whatever the choice of occupation or duties, the community survey will be the big determiner as to what occupation or job is important in the particular class. Listed below are the industries and jobs, ranked according to the number of responses each received, that those who answered the questionnaire thought most important to be included:

<table>
<thead>
<tr>
<th>INDUSTRIES</th>
<th>JOBS</th>
</tr>
</thead>
<tbody>
<tr>
<td>manufacturing</td>
<td>clerk-typist</td>
</tr>
<tr>
<td>insurance</td>
<td>secretary (stenographer)</td>
</tr>
<tr>
<td>law</td>
<td>mail and file clerk</td>
</tr>
<tr>
<td>medical</td>
<td>receptionist and telephone</td>
</tr>
<tr>
<td>banking</td>
<td>machine operator (data processing)</td>
</tr>
<tr>
<td>retailing</td>
<td>payroll and accounting</td>
</tr>
<tr>
<td>education</td>
<td>inventory, shipping, receiving</td>
</tr>
<tr>
<td>public accounting</td>
<td>supervisor and manager</td>
</tr>
</tbody>
</table>

Occupational areas covered should correlate with a study of the office openings in a particular geographical area with mobility emphasized.

Educational experiences common to all entry-level positions.—After tallying the questionnaire, it was determined that attitudes and proper work habits were most important. Other experiences were: (1) Office skills, i.e., typing, filing, machines. Emphasis was placed on electric typewriters and statistical typing. (2) Grooming and personality development. (3) Ability to follow directions, organizing to complete a task and applying facts to a particular task, perseverance, and creativeness.

Teacher understandings needed before attempting a program.—Understanding the business world with its procedures and work to accomplish, how the student's needs will be met to cope with the business world, and how to be an outstanding teacher are extremely important to the success of the program. The teacher must understand that his role in setting
up the program, supervising its completion, and handling students during the program will make or break a simulated office experience. He must understand that it is quite likely that the program will not be successful for each student.

Comments relating to enrollment of low and high ability students in the same class.--Four answers indicated that there should be separate classes. To keep them in the same class was indicated to be the best method by 32 of the answerers. Those that indicated one class supported their answer by stating that the low should be included, but it must be understood that the class was not a dumping ground; minimum standards for all enrollees of a "C" or better grade point average was desirable; positions could be regulated to the ability of the student; special encouragement should be given to the especially high and especially low; there should be some coordination with the guidance counselors to weed out only the really deficient; enough work is available to handle all students; and let the high help the low.

Follow-up of students.--There needs to be a follow-up. Comments of importance indicated that one initial follow-up should definitely be held and periodic follow-ups thereafter. Without this, program organization and materials are merely guesses that the right things are being taught.

Information flow should be rigidly established or flexible.--A flexible program was established as the best way to handle the situation. Students need more variety for a truer-to-reality program, because business shifts and sways. It would be nicer, organizationally, if there could be a rigid structure; but the nature of a laboratory course just does not allow this. The teacher needs to interject for review, reteaching, and evaluation.
Timing in a course like this cannot always be exact as in offices where a number of individuals are present.

In-service meetings. -- Thirty five answers indicated that in-service meetings were an excellent idea. Grooming, attitude, and occupational guidance could be covered. This would be a good time to talk over special problems. The advisability of meetings was supported by the fact that businesses are now doing this, problems can be handled as they arise, and it is a good way to handle individual differences. Fast learners can conduct the meetings.

Findings from Business Survey and Resource Material Survey

A personal analysis was made of eleven representative businesses. (See Table 5.) Major departments surveyed include sales, purchasing, private secretary, mail and file clerk, accounting, and receptionist.

A research supplement of resource materials was made covering all office practice textbooks and workbooks (latest editions only) from Gregg Publishing Company and Southwestern Publishing Company. Practice sets for filing and bookkeeping were reviewed for content and procedures. Business English, general business, and recordkeeping texts were also reviewed.

Following are lists compiled as a result of the business and resource material survey. With exceptions for certain localities, these lists could be used to select from and develop the program. Heavy reliance for information has been on A Study of Beginning Office Workers in Connecticut. The results of this study identify office job-entry positions in business firms. The results of this study are compiled from 824 businesses in the Dun & 

Bradstreet Million Dollar Directory and the Dun & Bradstreet Middle Market Directory, and the Dun & Bradstreet Reference Book. There were 522 interviews with beginning office workers and 353 interviews with supervisors.

Another study that is included in compiling the following lists was made by the National Office Manager's Society published in the Business Education Yearbook. Factors considered in promotion of employees were questions asked to 900 office managers. The list of attitudes desirable and knowledges and skills needed reflects the results of this study.

All lists included as a result of the surveys are partial and are listed in the order of their importance. The order of importance was obtained by tallying the number of times the item was mentioned or used.

---

LIST OF FORMS USED IN BUSINESS

- purchase requisition
- purchase order
- acknowledgement of order
- sales slip
- invoice
- stock record card
- inventory sheets
- receiving report
- columnar accounting paper:
  - general journal
  - accounts receivable journal
  - accounts payable journal
  - cash receipts journal
  - cash payments journal
  - petty cash voucher
  - check register
  - general ledger
  - accounts receivable ledger
  - accounts payable ledger
  - financial statements
- work sheets
- pegboard sheets
- checks with magnetic numbers
- IBM cards
- statement of account
- time slip
- payroll register
- W-2
- W-4
- quarterly returns
- tax forms, miscellaneous
- job descriptions
- job sheets
- training plans
- evaluation forms
- personnel records
- mailing lists
- bids
- tickler file
- money orders
- deposit slips
- telegram
- power of attorney
- telephone message
- inter-office routing slip
- ditto master
- stencil
- offset master
- list of retail items, stock number, and prices
- list of raw materials needed
- list of sources of raw materials
- price list of services or manufactured goods
- list of sources of customers
- list of accounts payable
- card layout form
- key-punching instructions
- flowchart sheets
- unit-record equipment job instruction sheets
- set of letters and memorandums
- request
- sales and orders
- follow-up
- information
- collection
- correction and adjustment form
- reservation
- application
- recommendation
- invitation and bid
- complaint and adjustment sheets
LIST OF EQUIPMENT COMMONLY USED IN BUSINESS OFFICES

pegboard
electric typewriter
manual typewriter
Xerox, Thermofax, etc.
adding machine
rotary calculator
printing calculator
duplicator, liquid process
duplicator, stencil
duplicator, offset
mimeoscope and tools
sorter
keypunch
reproducer
extra boards for wiring
collator
accounting machine
paper jogger
Flexowriter or similar
interpreter
Dictaphone or similar
tape recorder
filing cabinets of various sizes
desks
safe
chairs
sinks
work table
overhead projector
time clock
bulletin board
stop watch
interval timer
bookcase
wastebaskets
pencil sharpener
mirror
copy holders
file trays IN/OUT
LIST OF DUTIES PERFORMED BY BEGINNING OFFICE WORKERS

use of filing systems
use of telephone
use of adding machine
-type addresses on envelopes
make carbon copies
use calculating machine
copy data from one record to another on typewriter
verify and/or list information from business papers
prepare material for filing
use stapler
copy from rough draft or corrected copy on typewriter
figure extensions on bills, invoices, statements
type letters
fold, insert letters and seal envelopes
type cards
fill in printed forms on typewriter
use follow-up files
prepare trial balances
examine and/or sort business papers
prepare operating and/or financial statements
keep inventory records
make journal entries
figure discounts
compose and type letters with or without instructions as to content
make cross references
prepare stencil for use on duplicating machine
receive business callers
type bills, invoices, statements
make entries in ledger accounts
open, sort, and distribute mail
classifying and sorting
checking
filling in forms by hand
stuffing and sealing envelopes
collating and stapling
cashiering
answering customer's complaints over the telephone
attend meetings
order supplies
fold machine operation
taking dictation
transcribing from machine
punch cards
verify punched cards

(Continued on next page)
Duties Performed by Beginning Office Workers (Continued)

operate interpreter
operate sorter
operate reproducer
operate collator
operate accounting machine
file and register tapes
wire collator board
wire reproducer board
wire interpreter board
wire accounting machine boards
operate computer
operate high speed printer
test sample routines
make flowcharts
analyze data flow
plan and punch program card
card layout and design
design forms
duplicating
stenciling
offset equipment running
checking for accuracy
stuffing and sealing envelopes
acting as messenger
filing according to various systems
type rough drafts
type manuscripts
type legal material
locating materials on request
verifying extensions and totals
preparing tickler files
typing form letters
setting up transcribing machine in preparation for transcription
erasing records to prepare them for re-use
keeping records of sick leave pay and non-taxable wages
prepare and distribute pay checks
prepare annual reports of earnings and income tax deductions
take minutes at meetings
coding
investigating customer complaints
operate switchboard
handle petty cash
prepare and commit stock for shipment
replenishing stock
filling orders, issuing tools, equipment, or materials to workers
### LIST OF SUPPLIES COMMONLY USED IN OFFICE

**stationery**  
envelopes:  
- general correspondence  
- commercial size  
- official size  
- window  
- special size  
- two-way mailing  
- clasp  
- snap  
- full-letter size  
- legal-size  
- carrier  
- button and string  

dittos  
ditto correction pencil  
razor blade or correction knife  
stencils  
stencil correction fluid  
correction tape  
correction paper  
erasers of various types  
pencils  
pens  
adding machine paper  
cards, IBM  
cards:  
- 3x5  
- 5x8  
- special  
shield  
chalk  
scotch tape  
stapler  
staples  
mending tape  
staple remover  
stencil styli  
stencil screens  
stencil lettering scales  
second sheets  
post cards  
rough-draft paper  
onion skin paper  
carbon paper  
inter-office memos  
paper clips  
paper fasteners  
index dividers  
index cards  
ink  
labels  
rulers  
rubber bands  
rubber fingers  
collating salve  
file folders:  
- legal  
- regular  
- card  
card file boxes  
file labels  
file guides  
calendar  
magnetic tapes  
telephone and address book  
appointment book  
flowchart template  
reinforcements  
binders  
paper punch  
scissors  
paper cutter  
thumb tacks  
ditto paper  
mimeo paper  
chart materials  
shorthand notebooks  
scratch pads  
stamp pad  
stamps  
cleaning supplies  
colored paper  
typing ribbons
LIST OF BEGINNING BUSINESS OFFICE POSITION

Detailed descriptions may be obtained from the Dictionary of Occupational Titles or various other resource material.

Beginning Positions

bookkeeper
clerk-typist
stenographer
tax clerk
posting clerk
cashier
receptionist
telephone operator
payroll clerk
file clerk
private secretary
key-punch operator
card-tape converter operator
printer operator	
tablating record control operator
tape librarian
telephone-teletype operator
flexwriter operator
verifier operator
sorting machine operator
data typist
console operator
coding clerk
statistical clerk
personnel clerk
billing clerk
genral clerk
mail clerk
customer service representative

Major Industries

manufacuring
wholesale
insurance
banking
real estate
retail
service
medical
legal
lumber
repair
fisheries and other natural resources
government
school
LIST OF KNOWLEDGES, ABILITIES AND PERSONAL CHARACTERISTICS OFFICE WORKERS

SHOULD POSSESS TO BE SATISFACTORY

Knowledges and Abilities

typewriting
clerical ability to use telephone
bookkeeping
oriented to the business office
background in insurance
background in banking
background in legal procedures
understanding of technical terms
understanding of business procedures
knowledge of business communications
use of specialized office machines
filing
office flow of work
letter set up and composition
penmanship
statistical typing and setting up tables and charts
correct spelling, punctuation, and grammar
basic arithmetic
correct dictator's errors
transcribe accurately from notes or dictaphone
understand duplicating procedures

Social Traits

coopration
cheerfulness
courtesy
harmonious relations with associates
tactfulness
personality
consideration
friendliness
display a willingness to be helpful
interest in other people
poise and composure
possess a sense of humor
enthusiastic
self-confident
adaptable to change
maturity
seriousness

(Continued on next page)
Knowledges, Abilities and Personal Characteristics (Continued)

Physical Traits

personal appearance and grooming
health
physical endurance

Character Traits

dependability
initiative and resourcefulness
acceptance of responsibility
punctuality and attendance
loyalty
honesty and trustworthiness
perseverence or ability to follow through
industry
ability to keep confidences
conscientiousness
promptness in completing work
aggressiveness
patience
able to accept criticism
applies judgement in making decisions
adaptability
ability to work under pressure

Mental Traits and Attitudes

interest in work
ability and willingness to learn
like repetitious work
pays attention to detail
ability to make decisions
intelligence
willingness to do undesirable but essential tasks
mental maturity

Technical Traits

accuracy
neatness in maintenance of physical surroundings
efficiency
neatness of work
good speech habits
thoroughness
technical skill in tasks performed
attention to duties
organization of work and willingness to follow directions
ability to analyze and improve production and procedures
LIST OF REFERENCE MATERIALS

FOR LIBRARY

Selected Texts:
- accounting, bookkeeping, record keeping
- business law
- clerical office practice
- business economics
- secretarial office practice
- business English
- typing
- shorthand and transcription
- rotary calculator manual
- printing calculator manual
- key-driven calculator manual
- adding machine manual
- IBM reference books for each machine available
- English grammar and composition manuals
- spelling manual
- data processing
- systems analysis and flowcharting
- filing manual
- basic mathematics
- other specialized texts

Miscellaneous:
- materials concerning office work as an occupation
- dictionary
- almanac
- atlas
- telephone directory
- dictionary or reference books showing various occupations
- information on how to apply for a job
- various style manuals
- city directory
- thesaurus
- tax booklets
- civil service tests
- catalogs on business equipment and furniture

Periodicals
- Administrative Management
- Business Automation
- Business Education Forum
- Business Education World
- The Business Teacher
- Business Week
- Changing Times
- Today's Secretary
- Office Management

(Continued on next page)
Reference Materials (Continued)

Data Processor
FBE Bulletin
Journal of Business Education
Modern Office Procedures
The Office
The Office Economist
Office Executive
Paperwork Simplification
Systems
Systems and Procedures
Today's Secretary

There are many lists of free and inexpensive business education materials available. A good list of films to use in in-service training, tapes, records, filmstrips, etc. should be developed. Periodicals should always be around for student use and reference.

Summary of Survey Results

Upon completion of the questionnaire analysis, the business survey, and the resource material survey the facts have been gathered. The desires and requirements of educators and businessmen are now known. The course organization and content can be constructed upon the gathered facts, opinions, and practical experience.

The guidelines in Chapter V were developed to incorporate knowledge gained by the surveys to make sure that all aspects are covered and that the student completing the program is ready for an entry-level occupation.

The business and resource material surveys were also made to provide experience in developing proper techniques of information gathering and analysis to be used as part of the guidelines.
CHAPTER V

GUIDELINES FOR A SIMULATED OFFICE EXPERIENCE PROGRAM

The guidelines serve to elicit information necessary for the writing of important educational specifications for occupational preparation programs in business and office education using simulation of business practices. The guidelines were constructed to assist planners in the formation of creative solutions to questions arising during the development, implementation, and evaluation of the desired educational programs. The guidelines were developed as a planning tool for use by knowledgeable persons such as business education instructors, state supervisors, and local school officials. They can also be used for instructional purposes at universities, colleges, and workshops.

Format for Guidelines

Use of flowcharts.—A flowchart is easy to read and easy to follow, because it breaks the procedure down into a series of specific operations or steps in a definite order. The flowchart is connected by lines indicating the flow operations or steps that are explained in the symbols or blocks. Flowcharts of various kinds are widely used in today’s offices. Their use is by no means limited to computer and data processing applications. Flowcharts are used throughout the guidelines to demonstrate the steps involved in implementing the guidelines and the term is used throughout the text. The macro flowchart gives the total conceptual structure.
Micro flowcharts are presented for each guideline to summarize the steps for implementation. Typical symbols used include:

**INPUT/OUTPUT** - Indicates data that is put into the system or information that is provided by the system.

**DIRECTION-OF-FLOW** - Connects symbols and shows the direction of flow.

**OPERATION** - Denotes that an activity of some kind must be performed.

**DECISION** - Indicates that a decision must be made.

**TERMINAL** - Indicates a beginning, ending, or point of interruption in a flowchart.

**CONNECTOR** - Connects two places on the flowchart.

**Statement of the guideline.**—This is a brief statement of one facet of planning and implementation important to the total program.

**Purpose and explanation.**—These are statements showing the value and relationship of the guideline to the total program and a generalized group of comments describing the nature of the guideline and what it is to accomplish.

**Checklists**—These provide detailed items that are a part of the guideline. They are to prevent important considerations from being overlooked in the planning process and to encourage logical and systematic planning and implementation of the guideline. By checking items appropriate to individual situations, the program planner has the basis for setting that
portion of the program into operation. The directions show how to develop the guideline and tell the planner what he should have upon completion.

These are only guidelines and are to be used accordingly. Some sections will need moderate consideration and some sections will require detailed planning depending on the knowledge and experience of those responsible for developing the program. The guidelines are a tool—an ideal situation does not exist.
GENERAL MACRO FLOWCHART

PHASE I
IDENTIFY THE PROBLEM

PHASE II
GATHERING THE FACTS

a) initial thought
b) revise and evaluate

initial thought

define the program (Guideline I)

review and analyze

no clear understanding?

no continue?

yes continue?

drop program

yes continue?

drop program

no school support?

yes:

advisory committee into operation (Guideline III)

no approval?

yes:

community survey (Guideline IV)

PG. 2

no:

stop plans
interview students & make reports

select and place students

develop public relations

select evaluation plan & instruments

orient students to and implement evaluation

periodically review program

make reports to local, state, and federal agencies

list desirable revisions & review program as a whole

(Guideline XI)

(Guideline XII)

(Guideline XIII)

(Guideline XIV)

PHASE V
EVALUATE
periodically follow-up students

develop supplementary programs

Figure 1
GUIDELINE I

1. Initial thought
2. Review educational principles
3. Define philosophy
4. Review characteristics of simulation
5. Define purpose & formal statement of problem
6. Review elements of planning
   - No
     - Review and revise
   - Yes
     - Establish objectives
     - Guideline II

DEFINITION OF PROBLEM

Figure 2
GUIDELINE I - DEFINING THE SCOPE OF THE PROGRAM

Guideline

It is imperative that all concerned with a Simulated Office Education Experience Program understand its nature and characteristics; that a philosophy compatible to all phases of education be developed to guide the program; that the purpose be fully understood to use as a basis for the development; that the advantages and disadvantages be understood and considered in planning; and that objectives stated in terms of accomplishable outcomes be clear to guide the program planning, implementation, and evaluation.

Purpose and Explanation

Philosophy is an expression of feelings, beliefs, attitudes or impressions relative to a given experience. The philosophy of a course should tend to prepare one for present-day and future living.

The purpose of the program must be constantly evaluated to make sure that it is meaningful for the times, because horizons are continuously being extended in this rapid era of technological change. The purpose of the course must be clearly understood to make the learning experience sound. There is a temptation to arrange material in historical sequence as often outlined in a textbook, but this defeats the purpose of simulation which tries to replicate an actual office with all phases of business integrated.

Objectives are expressions which translate stated philosophies into some purposeful action. They are concrete statements explaining what a given phase of education or a particular course will attempt to achieve. Objectives are important to analyze in terms of the activities that may be provided to achieve the objectives. They are generally of two basic types: (1) general, which list the major areas of accomplishment being strived for and (2) specific, listing the skills or understandings to be obtained.
CHECKLIST 1: UNDERSTANDING THE ESSENTIAL NATURE OF A SIMULATED OFFICE EXPERIENCE PROGRAM

Directions: Rate the items you consider to be essential to the program. Then write the philosophy, purpose, and objectives of the course.

<table>
<thead>
<tr>
<th>Element to be Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Experiences are provided through the laboratory in which instruction will center around the performance of production tasks on actual occupational and educational projects which are brought into the laboratory from outside agencies or from within the school rather than a textbook.</td>
</tr>
<tr>
<td>2. The instruction duplicates, as nearly as possible, desirable working conditions; and at the same time, provides effective learning situations.</td>
</tr>
<tr>
<td>3. The cluster concept fits into the simulated program.</td>
</tr>
<tr>
<td>4. The flow-of-work approach is an essential characteristic.</td>
</tr>
<tr>
<td>5. It is important to understand the relationships among various jobs.</td>
</tr>
<tr>
<td>6. In order to be meaningful, a specific must be related to the function it serves.</td>
</tr>
<tr>
<td>7. Forms are the backbone of business communication.</td>
</tr>
<tr>
<td>8. Employees using data processing must understand systems.</td>
</tr>
<tr>
<td>9. Theories should be taught along with or following practice.</td>
</tr>
<tr>
<td>10. Each student has individual needs to be met.</td>
</tr>
<tr>
<td>11. There are definite principles of learning associated with a laboratory experience.</td>
</tr>
<tr>
<td>12. It is important to motivate students.</td>
</tr>
<tr>
<td>13. Immediate gainful employment is emphasized.</td>
</tr>
<tr>
<td>14. Pinpoint areas of weakness and competence.</td>
</tr>
<tr>
<td>15. There is a student-centered leadership.</td>
</tr>
<tr>
<td>16. The program is built on the integration of many activities.</td>
</tr>
</tbody>
</table>
17. The program is built on good human relations and interplay.

18. Organization of productive work causes students to depend on students.

19. There is an opportunity to develop work simplification.

20. Students can demonstrate initiative, creativity, intelligence, resourcefulness, and business acumen.

21. Grade requirements are equal to job standards.

22. Opportunity to apply theory learned in all other classes is available, i.e., shorthand, typing, book-keeping, math, English, general business, and general education.

23. The student is given a more comprehensive view of the entire business program.

24. There are definite advantages to the program. A small community, areas deeply affected by labor unions, lay-offs, and community criticism of the school leaving education up to the businesses are problems alleviated by the program.

25. Public relations for the school are increased as business, parents, and students feel the school is modern and innovative.

26. Students are not competing with local townspeople for part-time positions.

27. Employers participate in keeping in-school instruction consistent with current practice in business.

28. The program provides an effective means of developing young people for productive citizenship in the community.

29. Other areas of importance:
CHECKLIST 2: SPECIFIC OBJECTIVES FOR A SIMULATED OFFICE EXPERIENCE PROGRAM

**Directions:** Complete the checklist. Complete more research on areas of importance if needed. Develop a priority list of specific objectives with those you have given major emphasis and continue down the scale.

<table>
<thead>
<tr>
<th></th>
<th>major emphasis</th>
<th>minor emphasis</th>
<th>no emphasis</th>
</tr>
</thead>
</table>

1. To learn application for jobs procedures.
2. To develop practical applications using bookkeeping principles and terminology which can be used if accounting is used as a vocation.
3. Develop responsibility in typing communications.
4. Develop ability to transcribe routine correspondence.
5. Develop efficient use of photocopy machines.
6. Develop efficient use of duplicating machines.
7. Develop ability to type stencils and master sheets.
8. Develop proper telephone techniques.
9. Develop ability to judge the marketability of one's own work and to make the necessary adjustments or corrections, i.e., edit, carbons, erasures, spelling, punctuation, grammar.
10. Develop desirable standards of office appearance.
11. Develop knowledge of how to operate office machines.
12. Develop an understanding of filing rules.
13. Review the fundamentals of arithmetic.
14. Develop ability to direct others.
15. Develop higher standards of handwriting.
16. Develop ability to set up and type statistical material.
17. Develop ability to know the purpose of and use business forms.
18. Learn addressing techniques.

19. Learn manuscript techniques.

20. Develop ability to compose and use proper form for various types of business letters.

21. Learn mail handling and parcel post procedures.

22. Develop ability to meet callers and relay messages.

23. Learn check writing, bank account reconciliation, depositing, maintaining the checkbook, and banking procedures and processes.

24. Learn to check extensions and totals of business papers and develop skill in calculating machine operation.

25. Get an acquaintanceship with fundamental operations performed in data processing, i.e., classifying, sorting, computing, recording, summarizing, communicating, and storing.

26. Develop a relationship of data processing fundamentals to the basic types of data processing—manual, mechanical, punched card, and computer.

27. Develop an appreciation for the increased need for accuracy and control procedures to insure error-free performance.

28. Develop an awareness of the impact of automation on the society, economy, and business direction and the individual.

29. Develop an understanding of the principles of business management.

30. Other: _____________________________

____________________________________

____________________________________
GUIDELINE II

SCHOOL FACTORS TO CONSIDER

Guideline I

- review assumptions made in starting program
- student needs facilities cooperation

- instructional analysis & placement in curriculum

- select prerequisites & coordinate counseling

- obtain administrative approval

- select teacher

Guideline III

Figure 3
GUIDELINE II - SCHOOL FACTORS TO CONSIDER

Guideline

To be valuable the simulated office education experience program must be needed by the students of the school, and adequate facilities and personnel must implement it. The program must be consistent with the philosophy and purpose of the total instructional plan and contribute to it. To insure the program meets the individual needs of the students to be trained, counseling and guidance functions should be comprehensive. The vitality and prestige of the program rests with the enthusiastic support of the administration and the development of local school policies governing the program.

Purpose and Explanation

The program requires several basic elements of planning directly related to the school. Certain assumptions must be made.

1. Students need the program.—A follow-up of the students that have previously graduated will provide information on the things that students feel should be included and whether they think this experience would be helpful. At civic groups or Parent-Teacher Association meetings or at speeches before classes in business, an informal reaction of student need and interest, parental desire and interest, and business support may be obtained. An informal interview of a number of students can be held to determine interest and "spread the word" concerning the advantages.

2. Adequate cooperation.—Informal conferences with administrators, members of the business department, counselors, and other faculty members will indicate whether there will be cooperation within the school. Outside sources have led the initiator to believe they will support the activities of the program if favorable responses to an informal survey have been received.

3. Facilities, equipment, and supplies are adequate or can be made available upon reasonable request.—A review of facilities should show a room that can be devoted to the simulated offices. There should be supplies,
typewriters, voice-writing machines, calculating machines, and duplicating machines available. It will be desirable to have data processing equipment, especially the unit-record equipment. After careful consideration of federal funds, there should be the opportunity to purchase more equipment.

4. Instructional analysis. — A business and office occupational curriculum is defined as a sequence of learning experiences designed for the attainment of employability and satisfactory job performance on the part of the students in a family of business and office occupations or in a specific occupation chosen as a career objective by the student. The learning experience shall be provided through general education subjects, economics, and principles of business and specialized technical business and office education subjects. The subject should be placed in the senior year, as close to entry on the job as possible for a period of one year as a capstone course.

5. Prerequisites. — Since many of the units in the office practice class involve the integration of previously-acquired skills, the course should be offered on the basis of a stated background. Desirable prerequisites include typewriting, as the major one; general business; shorthand; and bookkeeping.

6. Guidance and counseling functions and school records. — The teacher-director will be primarily responsible for enrollment, placement, follow-up and recognition of special interests and aptitudes; but the counselors of the school will be helping to make sure that proper procedures are followed in accordance with school policies. It is desirable for a counselor to be on the advisory committee. The functions of guidance and counseling and proper record control are to recognize student needs through interpretation of school records, student background, and student test profiles.

7. Administrative approval. — Local schools should develop operational
policies for the program that are based on federal guidelines and legislation. This will insure that the program has realistic standards and procedures. What is expected from the responsible people involved and procedures to be covered in the program will provide a sound basis for discussing the program with the community and other educators. It will provide for equal treatment of all students.

In order to obtain administrative approval, a proposal for the program must be submitted to the principal, superintendent, or board of trustees, depending on the local school policies, that will give a brief but complete description of what is to be accomplished. This proposal can also be used by members of the advisory committee for understanding the program. Generally, when a well-organized proposal is presented to the administration and followed by oral communication and sound justification, acceptance will be likely, especially, if there is a desire to innovate and modernize the local vocational program and funds are available.

8. **Teacher-Director of program.**--The teacher facilitates the transition from the laboratory experience to the world of work. To be excellent at this job requires continuous self-study and experimentation. The complex job of teaching a simulated office experience program should not be given to the novice but a teacher with cumulative experience in many fields.
CHECKLIST 3: INSTRUCTIONAL ANALYSIS

Directions: Complete the review of items, checking those compatible with the total program. Research to clear up any hazy ideas. Write a statement of curriculum placement to be later incorporated in the course description section of the course outline.

___ Will incorporate all students.
   A. Acceleration of the outstanding will be arranged.
   B. Remedial learning for the disadvantaged will be arranged.
   C. Curriculum builds from lowest to the highest level, accepting the student where he is and building from there.

___ There will be flexibility of scope and sequence to allow for exceptions.

___ A common body of educational experience will be available.

___ All curriculum components will complement each other culminating in the simulated office experience program.

___ The program is administratively and organizationally sound with a definite placement of responsibility.

___ The program fits into the total schedule of use of facilities and equipment.

___ The program is consistent with students, size of school, and quality of staff.

___ The program culminates the office education experience.

___ Provision for consultation will be made including state and local educational services and those in the area where students will be employed.

___ Cooperation will be maintained between office education and areas of vocational and general education.

___ Curriculum provisions have been made to constantly revise and evaluate the total program.

___ The course content has been examined basically to determine whether it is up-to-date, appropriate for the type of training intended, is not repetitious, and is appropriate of the year in which it is offered.

___ There has been assistance in examining the curriculum from school administrators, business teachers, businessmen, and others who are interested.
The evaluation of the laboratory experience will be of value to the institution and the entire curriculum as well as the individual.

Other: ____________________________

CHECKLIST 4: STUDENT PREREQUISITES DESIRABLE FOR ENTERING THE PROGRAM

Directions: Select the prerequisites desirable. Evaluate the answers you choose to be sure they are compatible with the total school program. Write a list of prerequisites desirable for the program.

- General business
- Personal typing
- Typing I
- Typing II
- Shorthand I
- Shorthand II
- Bookkeeping
- Record Keeping
- Merchandising and retailing
- Economics
- Business law
- Introduction to data processing
- Programming and systems analysis
- Office machines
- Work experience
- "C" grade point average
- Senior standing
- Junior standing
- Have identified office occupations as career objective
- Have ability to profit from program
- Other: ____________________________

CHECKLIST 5: INFORMATION NEEDED ON STUDENT PERSONNEL RECORDS OF THE SCHOOL AND THE SIMULATED OFFICE EXPERIENCE PROGRAM

Directions: Complete the checklist, marking the items of information you need. Develop a record to use. Develop a policy for the use of the record.

Personal Data:
- Name
- Nickname
- Home address
- Sex
- Date of birth
- Place of birth
- Name of parents or guardians
- Birthplace of parents or guardians
- Marital status of parents or guardians
- Education of parents or guardians
Names of brothers and sisters
Ages of brothers and sisters
Summary of health information including hearing, sight, speech, disabilities, and immunizations

Extra-curricular Activities:
- In-school activities
- Out-of-school activities
- Athletics
- Offices held
- Honors received
- Special awards

Scholastic Record:
- School attendance
- Grades
- Courses
- Teachers

Test Results:
- Achievement
- Interest
- Aptitude
- Mental maturity
- I.Q.

Job Training Experience:
- Type of job
- Dates job held
- Employer name and address

Anecdotal Record:
- Discipline
- Interests
- Maturity
- Special skills
- Teacher recommendation
- Social skills
- Noteworthy attributes
- Character traits

Career Objective:
- Future
- Immediate

Other: ____________________________
___________________________

Policy Questions:

Where will the records be kept? ____________________________
Who will fill out the records? ____________________________
Will any copies be needed? ____________________________
Who will have access to the information? ____________________________

CHECKLIST 6: SCHOOL POLICIES TO BE DEVELOPED CONCERNING THE SIMULATED OFFICE EXPERIENCE PROGRAM TO INSURE STANDARDIZED OPERATION

Directions: Complete the checklist to be sure all needed factors are included. Review literature or discuss to clear any hazy areas or to determine if more policies are needed. Develop a proposal to the administration that could be adopted as policy for the simulated office education experience program. Each item you determine important should be written out in detail.

Selection of students:
- A. Fourteen years of age or older
- B. Ability to progress in area for which instruction is given.
- C. Final selection is primarily responsibility of teacher.
- D. Student's parents and student should attend orientation meeting.
- E. Definite prerequisites are required.
Training plans governing experiences the student will be assigned to in the program with responsibilities involved.

The number to be enrolled. A minimum of 15 and a maximum of 25 is recommended, but the enrollment should not exceed the limits of the facilities.

Related instruction that will be provided before entering the laboratory experience.

The laboratory facilities required and desired.

The number of hours spent in the related learning situation and the simulated office experience.

Teacher released time for planning.

The evaluation procedures.

Placement in the various training stations including the rotation schedules and position descriptions.

Placement in the various training stations including the prerequisites required for each.

Credit that will be offered to those who successfully complete the experience.

Requirements of field trips and asking speakers to provide related knowledge.

Administrative responsibility of the teacher-director and others in the school involved in making the program complete.

Use of school supplies and personnel to complete surveys required to keep the program current.

Use of the work experience program students to do work for the school or local business agencies.

Use of news media and other sources of public relations.

Selection, purposes, and activities of the advisory committee.

Materials development and procedures to be used in the simulated office experience.

Other:__________________________________

__________________________________
CHECKLIST 7: SELECTION OF A PROPERLY-QUALIFIED TEACHER-DIRECTOR

Directions: Complete the checklist to determine the qualifications that are most important to your school. Develop the job description. Select the teacher-director.

___ Bachelor's degree in field of business education.
___ Six to nine quarter hours in professional vocational education.
___ One to three year's experience in teaching.
___ Requirements for state credentials.
___ Pattern of continuous education updating including:
   ___ A. Directed occupational experiences recently.
   ___ B. Internship programs in business education.
   ___ C. Preparation in working with disadvantaged.
   ___ D. Institutes relating to simulation.
   ___ E. In-service programs locally and at the state or university level.
   ___ F. Other: ____________________________
___ Meets the requirements of the state for teaching federally-reimbursed educational programs.
___ Understands federal legislation as it relates to vocational education and a simulated office experience program.
___ Has a sincere desire to assist young people in developing into competent employees.
___ Is prompt, respectful, courteous, sympathetic, and consistent in all dealings.
___ Is a good organizer of instruction.
___ Is able to adequately complete reports and records concerning details of the program.
___ Has sufficient physical and mental stamina to discharge his duties effectively.
___ Is able to effectively maintain public relations for the program.
___ Understands the objectives of general education, vocational education, business education, and office education and their relationship to each other.
___ Has an understanding of the physical and financial limitations of the local school district.
Understands the types of advice and resource materials available from the advisory committee and persons in the community.

Is familiar with the teaching methods to be used in a simulated office experience program.

Has the ability to select and place students in the work experience portion of the capstone course.

Understands coordination of job experiences and classroom instruction.

Understands coordination of guidance and counseling.

Understands the techniques of evaluation and follow-up.

Is professional in teaching and participates in local, regional, and national groups leading to a broader background.

Is able to motivate students to work in a mature and business-like manner.

Is able to arrange for inclusion of materials to meet the needs of individual students.

Understands how to cope with students who do not understand office procedures, the importance of absenteeism, and working under a supervisor.

Understands the flow of material common to all offices and inter-relationships of jobs.

Has subject matter knowledge.

Possesses self-confidence and has the respect of students.

Understands that the sophistication of the program depends on the imagination and planning of the teacher.

Recognizes that the occupational experience is to help overcome short-comings as students prepare to seek employment.

Has ability to re-examine to be certain that the curriculum reflects changing concepts and that adequate staff and facilities are provided.

Is willing to work to coordinate the program with post-high school institutions.

Other: ___________________________

______________________________
GUIDELINE III

ADVISORY COMMITTEE
AND PLAN OF ACTION

Figure 4
GUIDELINE III - ADVISORY COMMITTEE

Guideline

An advisory committee shall be established in an initial effort to obtain advice to improve the Vocational Business and Office Education programs.

Purpose and Explanation

The committee shall provide direction and make the best use of resources. Members shall be chosen from the community, school faculty and administration, and include the teacher-director. These key individuals will provide the consultative advice to the director to insure accuracy and comprehensiveness of the program. The committee should include from seven to twelve persons. Perhaps staggered terms could be set up to insure that there is always an experienced member available. The program director shall be in charge of activities of the advisory committee.

The Vocational Education Act of 1963 makes the use of advisory committees mandatory for vocational programs at the state and national levels. If the instructional program is to be kept in tune with the needs of the individuals and the agencies to be served, they are also needed at the local level.

The members are tentatively selected and issued a written invitation to serve. When membership is established, a general orientation meeting is held to obtain approval of the program thus far adopted and to help plan the phases that need to be completed before implementing the program. Call on the advisory committee when there is something specific to do.

A steering committee may be appointed to organize the program, then an advisory committee may be selected after the program is in operation.
CHECKLIST 8: POLICY FORMATION CONCERNING ADVISORY COMMITTEES

Directions: Complete the checklist marking items that you wish to be incorporated into the program. Obtain administrative approval. Write out statement of policy concerning advisory committee.

Selection of Individuals as Representatives

__ From business as an employer: ____________________________________________

__ From business as an employee: ____________________________________________

__ From education:
   ___ Superintendent:_______________________________________________________
   ___ Principal:____________________________________________________________
   ___ Director of Vocational Education:_______________________________________
   ___ Guidance Counselor:___________________________________________________
   ___ Simulated Office Experience Director:___________________________________
   ___ Business Department Chairman:________________________________________
   ___ Faculty Member:_______________________________________________________
   ___ Student Council Representative:________________________________________
   ___ State Department of Public Instruction:_______________________________

__ Civic Club member:______________________________________________________

__ Parent:________________________________________________________________

__ Chamber of Commerce Member:___________________________________________

__ Professional Association Member:_________________________________________

__ Representative from State Employment Service:____________________________

__ Member of the News Media:_______________________________________________

__ Other:________________________________________________________________

Steps to take to Organize Advisory Committee

__ Select representatives desired.

__ Administrative approval.

__ Send out letter of request to serve.

__ Send out letter of notification of selection after process has been completed.
Set up the number of people to serve and the rotation schedule for their terms of office.

Plan orientation meeting.

Meet with members for orientation and to plan calendar of events.

Select a secretary to take minutes, a person to notify members of meetings and send out the agenda, and a person to correspond with the State and National advisory committees.

Decide on the number of regularly-scheduled meetings to have.

Obtain advisory committee approval of program thus far established.

Write out policies concerning purposes, activities, and organization of advisory committee.

Other:

Statement of Duties and Responsibilities

To provide the school administration with advice on the types of courses in business and office education needed to satisfy the training needs of the community.

To help in the work of the community surveys by determining the data to be gathered and by supporting the studies and gaining the best community reaction to them, as well as by helping to evaluate the results from the studies.

To help plan a set of standards for entrance into vocational office positions upon completion of their training.

To help the teacher make a list of available reference material.

To help provide places for field trips and outside speakers.

To discuss local employment opportunities and standards in and out of the classroom.

Assist in organizing a follow-up program for graduates.

Other:

Need steering committee and advisory committee.

Tentative dates for meetings:

________________________

________________________
GUIDE IV

COMMUNITY SURVEY

Guideline III

Determine how to obtain information

Establish plan or instrument

Circulate

No

Approval

Yes

Gather data

Tally data

Analyze data

Draw conclusions

Guideline V

Figure 5
GUIDELINE IV - COMMUNITY SURVEY

Guideline

The simulated office education program should be planned to be compatible with the local community needs and those of the student who will be working in the community.

Purpose and explanation

Students in a simulated office experience program are employed by businesses in the local community. In order for a good program to be effective in a particular community, some means of determining the requirements of the job opportunities in the community must be provided. The means for determining these requirements is usually a community survey.

In completing a survey, we are trying to determine the areas of employment that will actually be open to graduates in office education, the types of jobs, skills and knowledges needed, the companies willing to allow a systems analysis of their procedures, and make public relations contacts. After completion, it should be established which businesses will be willing to have field trips to their offices, sponsor speakers, and have an appreciation for what the school is trying to accomplish in their training program. In many cases, the market for students may exceed the local area. A follow-up of graduates plus the knowledge of teachers with experience in the school or guidance records will show where students go to work.

Students in office practice, economics, typing, or general business can be utilized to do the preliminary work. The advisory committee and students may help by introducing the importance of the program and developing the questionnaire or interview sheet and selecting the businesses that will be surveyed. It will be the responsibility of the teacher-director to see
that a careful and valid questionnaire or interview report is distributed, tallied, and analyzed. In all cases, the approval of the administration and the advisory committee should be obtained.

CHECKLIST 9: POLICY STATEMENT ON COMMUNITY SURVEY

Directions: Complete the checklist. Select the items appropriate to your situation. Write the policy statement governing the community survey.

___ Questionnaire to all businesses.

___ Questionnaire to selected businesses:
  ___ banking ___ retail
  ___ insurance ___ real estate
  ___ law ___ wholesale
  ___ construction ___ education
  ___ medical ___ other: ________________________
  ___ accounting ___
  ___ manufacturing ___

___ Questionnaire to be sent to areas where students will be employed, including those beyond the local community.

___ Emphasis will be placed on the local community only.

___ Circulation of questionnaires will be expanded to other areas.

___ Types of jobs available will govern the placement of questionnaires:
  ___ receptionist ___ clerk typist
  ___ mail and file clerk ___ payroll and accounting clerk
  ___ inventory, shipping, receiving ___
  ___ executive secretary ___ other: ________________________
  ___ machine operator ___
  ___ supervisor and manager ___

___ An introductory letter will accompany the questionnaire.

___ An introductory speech to civic organizations will be given.

___ A personal contact of advisory committee or other representative will introduce the questionnaire.

___ The questionnaire will be administered orally in a personal interview.

___ A time for completion will be established: 1 wk. ___, 2 wks. ___, other ___.

A follow-up plan will be devised to obtain responses that were not immediate.

Somebody will be designated to tally the questionnaires.

Somebody will be designated to analyze the questionnaires.

The questionnaires will then be used for selection of the representative company(ies) that will be incorporated into the simulated office experience program.

The questionnaires, tally, and analysis will be filed in a particular location for a designated length of time.

CHECKLIST 10: COMMUNITY SURVEY FACTORS TO DETERMINE WHAT INFORMATION SHOULD BE OBTAINED FROM LOCAL BUSINESSES

Directions: Complete the checklist, choosing questions desirable for your use. Review what you selected to make sure it is important. Add any other ideas you may have. Develop the questionnaire. Develop the introductory instrument. Tally the answers after the results have been received. Analysis of answers should be applied to planning the program.

General:

- Firm name
- Firm address
- Form completed by and title
- Date
- Type of business
- Telephone number
- Name of company's chief executive or party responsible for contacts with the school
- Other: __________________________

Employment:

- How many employees are considered "office workers"? (Office workers include bookkeepers and accountants, clerks, typists, stenographers and secretaries, receptionists, switchboard operators, payroll clerks, office machine operators, office supervisors, file clerks, mail clerks, etc.)

- How many beginning office workers did you hire last year? (A beginning office worker is a person employed to work in a business office, who has had no previous full-time office work experience, except summers, and whose formal education does not extend beyond high school.)
Through what sources do you obtain beginning office workers?

What are your beginning salaries before deductions are made?

How many office employees are male?

How many office employees are female?

How many part-time employees do you have?

Name of any job entrance tests administered.

Education desired of new full-time employees

Do you have difficulty securing office workers?

What do you feel are likely to be the best job opportunities in office occupations during the next few years?

Do you have a formal training program in your firm?

Approximately how many of your employees are high school graduates, business school graduates, university graduates, other?

Other:

Cooperation:

Would you be willing to allow a detailed systems analysis of the work and procedures used in your office to develop a simulated office situation for the classroom? Do you have an organizational chart to use?

Would you be willing to send representatives to the class to tell about your work and office procedures?

Would you be willing to allow group visitations to see the equipment and procedures used in your office?

Would you be willing to serve on an evaluation committee to make sure that the simulated experience is representative of the modern office?

What deficiencies do you feel the beginning office worker has?

What character traits are desirable in office employees?

What employment standards do you have for beginning office workers?

In what jobs do you place high school graduates?

What office machines do you use? What filing system do you use?

Other:
GUIDELINE V

Guideline IV

→

set policy on enrollment groupings

→

set policy on numbers to enroll

→

establish number of offices, types, positions in each

→

set plan for rotation schedule

→

Guideline VI

ESTABLISH ORGANIZATIONAL STRUCTURE

Figure 6
GUIDELINE V - ESTABLISH ORGANIZATIONAL STRUCTURE

Guideline

An organized classroom structure is needed to make sure that the experiences will be representative of the modern office and educationally organized to be most valuable.

Purpose and Explanation

There are any number of ways to establish the organizational pattern. As any experienced teacher knows, it is impossible to take a canned program and start teaching without adjustments for the particular situation. After completion of the community survey, you have seen which types of businesses are representative of places your students will start working, which types of jobs are available, and which office situations are most representative of the market students will be entering. In this section, we are trying to establish educationally-workable patterns.

CHECKLIST 11: ORGANIZATION OF SIMULATED OFFICE EXPERIENCE PROGRAM

Directions: Complete the checklist, selecting the situation that will be best for your program. Write a policy statement.

___ Clerical and secretarial students (a) separate classes, (b) one class, or (c) other:__________________.

___ High and low-ability students (a) separate classes, (b) one class, or (c) other:__________________.

___ Enrollment maximum (a) 10-20, (b) 20-25, (c) 25 but not over 30, or (d) other:__________________.

___ How many offices are desirable? (a) 1, (b) 2-4, (c) 5, (d) 5-10, or (e) other:__________________.

___ Students will be rotated (a) so he works in each position, (b) placed in one position in each office and rotate offices, (c) so he is kept in the same position during the entire experience, (d) so he is kept in the same office but rotated within, or (e) other:__________________.
The class periods should be (a) single period, (b) double period, or (c) other: ________________.

The time provided for related learning will be (a) six weeks, (b) seven weeks, (c) eight weeks, (d) nine weeks, or (e) other: ____________.

Related learning and work experience will be (a) consecutive (one period each), (b) consecutive (first related learning and later work experience), or (c) other: ________________________.

The time that will be allotted for specific orientation to the work experience program will be (a) one week, (b) two weeks, (c) other: ________________.

The areas of business to be represented are (a) one company, several offices, (b) one office, several work situations, (c) several offices in different occupational areas, (d) service bureau, or (e) other: ________________. (Note: This will require careful definition after basic selection.)
GUIDELINE VI

Guideline V

- business yes survey?
  - yes
    - select specific business(es)
    - organize survey
    - make contacts
    - analyze work flows & procedures
    - develop flow charts
    - verify information
    - correct?
      - yes
      - Guideline VI
      - write narrative
  - no
    - organize survey
    - review material and tally
    - analyze data & consolidate to workable form
    - write narrative
    - make flow charts
  - no
    - materials yes survey?
      - yes
      - obtain source materials for reference & analysis
      - organize survey
      - review material and tally
      - analyze data & consolidate to workable form
      - write narrative
      - make flow charts
      - Guideline VI
      - write narrative
    - no
      - Guideline VI

Figure 7
GUIDELINE VI - BUSINESS SURVEY & ANALYSIS

Guideline

To provide a comprehensive and realistic experience, the management process, which is a series of interrelated steps or functions which when satisfactorily performed lead to the achievement of goals, must be carefully surveyed and duplicated.

Purpose and Explanation

To make the plan workable and a realistically-valuable experience, the actual procedures, forms, and equipment used in business have to be determined. If a careful analysis is not done, the development of materials and the Policies and Procedures Manual may fall short, and the improved program of vocational preparation may not be developed. Systems analysis of the business to be used will eliminate conflicting or overlapping course content, unnecessary functions and activities, provide more control, and improve morale and a stronger professional attitude as students know they are doing work as it is actually practiced in office employment.

Two alternatives will be briefly discussed. The first is to actually go into the business selected and study what is happening. The second is to research available working materials. Principles of management—planning, organizing, staffing, and controlling—need to be followed throughout the development of this entire program and during the analysis of results from the business survey.

The teacher-director will undoubtedly want to be in on the survey and will probably be the leader. This allows the teacher-director to have a first-hand knowledge of the business system. This applies equally to going into the business or doing the resource material survey. Members of the advisory committee can be a big help in this area or they could be delegated to
complete the survey. The teacher-director, with the cooperation of the superintendent, should at least be responsible for the organization and analysis of results. The team approach is preferable, because more than one area can be covered at a time and several interpretations may be discussed.

Alternative I - Business survey.—There are several different ways the team may use to gather data. Details of what is being done may be obtained from organizational charts, policy manuals, and taped interviews with employees and management. A detailed description of each form and its origin, its processing, and its use is probably the best way of getting all the information concerning the business, though general interviews may be helpful and provide adequate background. After the information has been obtained, to be useful it must be organized.

One tool to use is the systems flowchart introduced in the beginning section of the guidelines. Beginning with the source document inputs, each step in the operation is charted using the proper symbols. Files and equipment which are used are identified; the sequence of steps in the processing procedures is shown; the different departments involved are located; and the output results are presented. Although the chart may also indicate processing frequencies, input and output volumes, workers who perform each step, time required to complete each step, and the materials and supplies used, such information is frequently noted on separate questionnaire forms which may be keyed to steps in the flowchart. One of the best guides to gathering information is the IBM booklet entitled Documentation Techniques (IBM Corporation, Manual C20-8075). This booklet gives examples of forms which are useful in the fact-finding process.
Alternative II - Resource survey. - Possibly, there may be some reason—
time, expense, lack of a truly-representative company, lack of cooperation, 
etc.—that may prevent actually going into the business. In this case, 
research can be undertaken to obtain activities and jobs that represent 
business.

To identify tasks that are being performed by employees, a number of 
research studies can be analyzed to find out useful information. When 
surveying resource materials and studies, it is helpful to have a tally or 
checkoff sheet. Additional information concerning the use of a resource 
material survey was provided in the section pertaining to this method 
that was incorporated in Chapter II and Chapter IV.

CHECKLIST 12: BUSINESS SURVEY TO USE IN THE DEVELOPMENT OF A POLICIES AND 
PROCEDURES MANUAL, DETERMINING FACILITIES AND EQUIPMENT, AND 
THE DEVELOPMENT OF MATERIALS AND COURSE OUTLINE.

Directions: Follow the steps outlined in the checklist to complete the 
business survey. Analyze and make adjustments if necessary. Write up 
the findings of the survey.

___ Select the business or businesses most representative of those students 
will be entering upon completion of the program.

___ From the above list, select the company(ies) that will be represented 
in your organizational plan.

___ From that list, select the company(ies) that will be most helpful in 
allowing a systems analysis of their policies and procedures.

___ Through the superintendent, contact the company and make arrangements 
to analyze their policies and procedures—time involved, who will need 
to be seen, when they will need to be seen, what reference material you 
would like furnished, and the value of the service that the company will 
be performing for the educational program.

___ Select the members who will be on the analysis team, and arrange for 
them to meet the schedules established with the company.

___ In advance contact personally each person to be interviewed, explain 
what is being done, its purpose, and how they can help.
Prepare people with request for all forms that originate with their position, cross their desk, and leave their desk. Have them be prepared to tell where it comes from, what they do with it, and where they send it. Prepare an interview sheet so nothing will be forgotten.

Tape the interview with the employee or representative of a particular department. (It is not necessary to interview every department employee, because the manager of each department can explain what is going on in his department. Of course each employee may be interviewed if desirable.)

(a) Obtain all information listed in the previous item.
(b) Ask for ways the employees feel there could be improvement in the system.
(c) Ask for personal comments on pressure, personality, and skill and knowledge requirements, and other items deemed important.

Make a typed transcript of the taped interview.

If there are gaps in the information, recontact the person and ask him to explain. (Though they have been asked to prepare, it is often difficult to remember every step that is usually done as a part of a routine.)

Draw up a detailed flowchart of each document used within the system.

Draw up a macroflowchart of the work flow in the department listing inputs, decisions, approvals, processing, and outputs.

Write a brief narrative to correspond to the flowchart making comments on equipment, pressure, personality requirements, supplies used, time, etc.

Write a job instruction sheet showing purpose, description of the job, the forms, equipment, and supplies to be used, and the processing to be done on the job.

Take the flowchart, narrative, and job instruction sheet back to the supervisor to determine if all information is correct. (Adjustments can be made on the documents, because they are merely worksheets for development of the policies and procedures manual.)

Complete a final draft if necessary.

Put all the departments together to form a flowchart for the total office system making sure to reference the detailed flowcharts that correspond.

Look for educational improvement. Make any adjustments required for teaching purposes.

Compile the report.

Send courtesy copy to the company involved and make the proper thank yous.
CHECKLIST 13: DATA GATHERING QUESTIONS

Directions: Select questions to be included in the survey. Develop survey plan.

What source of information is used?
___ What source documents are received?
___ What source documents are used?
___ Where do they originate?
___ What is the frequency of input—daily, weekly, monthly, periodically?
___ What is the maximum volume received?
___ What is the average volume received?

What work is done?
___ What records and files are being kept to support the operation?
___ How frequently is the operation being performed?
___ What volume fluctuations occur in the operation?
___ What is the volume or magnitude of work in each phase of the operation?
___ What is the cause of any fluctuations in volume?
___ What is the flow of work, i.e., what sequence of steps is followed to perform the operation?

What business resources are used?
___ What departments are involved in the operation?
___ What place in the organization do they occupy?
___ What is the primary function of the department?
___ How many man-hours are needed?
___ How much time is required to complete each step?
___ What equipment is being used? For how long?
___ What materials and supplies are being used?
___ How much does it cost to perform the operation?

What results are achieved?
___ What output reports are prepared?
___ What is their purpose?
___ Who uses the reports?
___ What use is actually being made of the reports?
___ What is the percentage of accuracy?
___ Where are they stored?
___ How timely are they?

What personal factors are involved?
___ When you feel the most pressure.
___ What are the typical interruptions?
___ How are you evaluated?
___ What type of personality is needed for this position?
___ Why were you selected for this position?
___ Where did you receive information about the position?

Other:_____________________________________
_____________________________________
_____________________________________
GUIDELINE VII

- Review the set up as per business survey
- Plan equipment:
  a. desire
  b. need
  c. able to get
- Establish facilities & equip. plan
- Order change in facilities
- Investigate lease, rent, purchase
- Order equipment

Determine supplies & order
Set up immediate inventory
Set up needs for future
Set up classroom

Figure 8
GUIDELINE VII - FACILITIES AND EQUIPMENT AND SUPPLIES

Guideline

Selection of facilities, equipment, and supplies should be planned on the basis of flexibility and maximum use for group and individual instruction. They should be purchased, rented, or leased according to the most economical plan and in the most economical quantities.

Purpose and Explanation

Instructional facilities and equipment may consist of classrooms and fully-equipped laboratories where pre-employment skills are taught, including study tables, chairs, desks, files, bookcase, chalkboards, bulletin boards, magazine racks, storage space, and specialized business machines. Facilities and equipment are non-expendable and should be selected according to carefully-analyzed needs. Supplies are expendable and used to complete the tasks of the office. They are used in conjunction with facilities and equipment.

Funds for remodeling, building, or purchasing equipment and rooms come mainly from four sources; under provisions of NDEA, Vocational Education Act provisions, MDTA funds, and/or state and local funds. Generally speaking, equipment is purchased, or authorized to be leased or rented. Students and teacher together can develop the inventory plan, selection, ordering, budgeting, and developing of a coordinated system for handling facilities, equipment, and supplies.

Major areas that are needed for the simulated office experience program include lecture-demonstration area used principally for group action and learning; seminar areas, used principally for group action and learning on individual projects; laboratory areas used for individual action and learning; conference areas with private facilities; library areas for use of reference materials; and storage areas. Auxiliary areas may be developed to meet the needs of individual school situations.
CHECKLIST 14: DETERMINING FACILITIES, EQUIPMENT AND SUPPLIES NEEDED

Directions: Complete the checklist. Develop plans for the room including space, furniture, machines, and storage needs. Review with the advisory committee to make sure that nothing has been forgotten. Write up plans and specifications. Arrange for orders and changes to be completed. Inventory the equipment and supplies. Set up and arrange facilities, equipment and supplies.

General Information:
Total to be enrolled in the class._____________________
Total number of classes._____________________
Hours will be using the room._____________________
Other classes or groups to be using the room.
(If it is devoted to the simulated office, facilities can be specialized; if multiple use is required, decisions must include the adjustments for the needs of other classes.)
Number of offices needed._____________________
Number of students to an office._____________________
Each unit self-contained or general work space needed._____________________

Information about the areas:
Make decisions on the basis of the following variables and write out plans for each area:

- Aesthetic.---colors, light, style of architecture, design, etc.
- Aerial.---air temperature; radiant temperature, relative humidity, and ventilation
- Visual.---things affecting accuracy in perception, attention to tasks, and speed of performance
- Sonic.---acoustical requirements and sound system
- Spatial.---the extent to which the area should be acceptable to the other areas (Keep in mind state regulations.)
- Time priority factors in area development.

Lecture area (student seating, lecture, work tables, projection equipment, bulletin boards, doors, windows, aisles, storage, chalkboard, machines, electrical needs, and special utility needs)

Library and project area (shelving, work table, chairs, doors, windows, aisles, storage, machines)
Model office area (desk, chair, typewriter, filing, telephone, in/out basket, reference area, equipment other than this)

Teacher's office (desk, chair, reference shelving, telephone, visitor chair, file cabinet, tables and business machines, equipment other than that mentioned)

Central file and supply (pigeon holes, shelving, file cabinets, chairs, desk, worktable, typewriter)

Central duplication (sink, work table, chairs, storage, other equipment)

Central data processing (shelving, storage, work table area, chairs, equipment)

Other
GUIDELINE VIII

1. Determine common body of knowledge needed
2. Set up outline of background needed
3. Review student background
4. Establish time schedule and priorities
5. Set up general orientation program
6. Set up specific orientation program

DEVELOPMENT OF COURSE OUTLINE - RELATED LEARNING

- Write course outline
- Develop units

Figure 9
GUIDELINE VIII - DEVELOPMENT OF COURSE OUTLINE FOR RELATED LEARNING

Guideline

There is a common body of knowledge that must be understood in order to have a smoothly-running simulated work experience program.

Purpose and Explanation

The needs of the community, the individual student, the policies and procedures of the selected business(es), the organizational structure, and the time elements for various phases of the program have been established. Now, it should be established what students need to know before going into the actual work experience.

Skills should be classified into necessary learning, incidental learning, and acquaintanceship, related to employment-level skills and knowledge. The items to be taught must then be organized into the time allotted in a logical and specific sequence of development.

Basically, learning will be divided into general background review, new learning development, and specific orientation to the simulated work experience program. General orientation will provide the needed background to be successful in the experience, and the specific orientation will deal directly with how to work in the simulated experience.

CHECKLIST 15: COURSE OUTLINE DEVELOPMENT FOR A SIMULATED OFFICE EXPERIENCE

Directions: Complete the priority listing of content items that you feel are most important. Set up a course outline. Do this by organizing items in a logical sequence, developing working units for each topic, establishing time schedules, and putting everything in writing. This list is in no logical order. This is to get the person making out the checklist to consider items individually and not as a part of an established related group of study. Review with the advisory committee.
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<th>Incidental</th>
<th>Acquaintance</th>
<th>Not Needed</th>
<th>Necessary</th>
<th>Incidental</th>
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Savings and investment
Contracts
Consumer legal problems
Negotiable instruments
Banking
Office organization
Office routine
Job relationships
Operational charts and work flow
Aptitude and personality tests
Personal appearance
Clerical typing
Skill on electric typewriter
Addressing envelopes
Typing of direct-process
Masters and stencils
Rough draft and manuscript
Typing and organization
Typing business forms and papers
Typing from direct dictation
Typing multiple carbons
Erasing
Machine transcription
Adding machine
Calculator
duplicating processes
Verifying bills, invoices, and statements
Composing letters
Selecting and typing form
Letters and fill-ins
Interoffice communication
Personality development
Mental skills development
GUIDELINE IX

DEVELOPMENT OF MATERIALS

Guideline VII

- review business or materials survey

- review student background

- determine forms, functions, products, etc. to be used

- determine major teaching methods to use

- develop materials

Guideline X

Figure 10
GUIDELINE IX - DEVELOPMENT OF MATERIALS FOR THE PROGRAM

Guideline

Development of materials should be carefully guided by the individual and group learning needs of the students.

Purpose and explanation

From the accurate source records developed as a result of the business survey, actual working papers and projects must now be developed for use in class. Basically, when we speak of materials in the simulated program we are talking about forms. The problems that are involved include decision making, obtaining information, performing duties to complete a job, self-research, creativity, and skill. It is important not to over-direct the process and keep in mind that output is the result of group effort and coordination.

Because of the expense involved, forms will probably be duplicated rather than printed. Materials, i.e., letters, set of books, etc., can be developed in conjunction with related learning units. While students are helping to set up the file of materials, the teacher can be making lists of interruptions, rush projects, etc., to use as either evaluation or realistic deviations from routine. The data bank will grow in volume and accuracy as experience with the class progresses. It should take approximately three years to get a complete program developed.

Following are three major approaches to the development of materials:

1. The project method.—This allows for a certain project to be completed in the realistic working situation. The student in charge of payroll may be given a set of time cards on Monday morning, must extend and take the necessary
processing steps to distribute the checks on Friday. The student may have
to refer to other departments for information and dispensation of information.
Generally, instructions, reference materials, and procedures are clearly
written. The answers are turned in for checking at a specified time.

2. The self-generating office.--This is an outstanding experience for
students. It requires a great deal of original preparation and careful
evaluation. Perhaps it is the most realistic method and should be developed
if not for the first year the program is in operation, shortly thereafter.
An outside office, the teacher, or a general office plans the inputs for
the system. They flow to the various departments to be acted upon by the
proper students in designated positions.

3. The "in-basket" technique.--The time of day, date, and other circumstances
are stated. The student is given a few, if any, special instructions on the
problem. Various items await action of the secretary. These items consist
of some crisis situations that should be attended to at once; some just
routine, and some that need to be done by a future time. The secretary
determines the sequence of action on the items and exactly what action is
to be taken.

CHECKLIST 16: DEVELOPMENT OF MATERIALS

Directions: Complete the checklist for planning purposes. Review the list
to make sure that all steps necessary have been taken. Develop materials at
this point or plan for integration into general orientation and related
learning portion of class. Make a list to include what is necessary.
Continually be building the data bank.

___ List of letters covering all filing rules.
___ List of letters covering all types of correspondence.
Letters developed are realistic.
List of all forms to be used.
List of all functions to be performed.
Use of forms includes a comprehensive experience.
Develop list of accounts payable.
Develop list of accounts receivable.
Develop inventory (raw materials and sales and company-owned inventory).
List of wages students will receive.
Price lists for raw materials and manufactured goods and/or services.
Materials termed "emergencies" or "rush."
Projects that must be completed by the end of the day listed.
A set daily routine established.
Referral to various departments has been built into projects.
Varying degrees of decision-making are built into the projects.
Self-generating office experiences are developed.
Project tapes are developed to cover all experiences desirable.
The in-basket technique is to be used.
The materials and procedures are common to all "real" office situations.
Other: ____________________________

______________________________
GUIDELINE X

DEVELOPMENT OF POLICIES & PROCEDURES MANUAL

- Review business & community surveys
- Review organizational plan
- Review materials development
- Set up job analysis & descriptions
- Set up company rules and organization
- Establish flow of work

Figure 11
GUIDELINE X - DEVELOPMENT OF POLICIES AND PROCEDURES MANUAL

Guideline

To be an effective simulated office experience program, a definite
organizational structure must be outlined for easy student understanding
and reference.

Purpose and Explanation

In order to understand the part each student plays in the entire
organization, some overall picture must be given. The Policies and Procedures
Manual will provide reference covering what is expected of the student and
the procedures he should follow. Without this, organizational chaos could
develop; and the teacher-director would constantly be deluged with questions.

Before entering the actual work experience, the students must carefully
review and understand the manual. Teacher-class orientation is needed.
This will provide some time for questions and discussion before actually going
into the work experience. The information flow should be fairly standardized
so students know what is going on. Their constant referral to the manual
will develop a knowledge of office procedures. It is then up to the
teacher to allow for flexibility and put in exceptions to test the
student's understanding and decision-making ability.

CHECKLIST 17: PLANNING FOR POLICIES AND PROCEDURES MANUAL

Directions: Review the checklist and make comments on desirable items.
Write up the policies and procedures manual. Review the checklist to make
sure the manual is comprehensive and realistic. Write out and duplicate for
student orientation to the program. Discuss in detail at specific orientation
period prior to starting the experience.

____ Company(ies) description prepared.
____ Company(ies) policies regarding employees prepared.
List of products or services rendered.

List of number of employees.

List of departments.

Fringe benefits.

Evaluation scale.

Grievances and other employee problems and privileges.

Organizational chart of all positions available.

Office layout.

Department layout.

Training station layout.

Job description for each position.

Training plan for each position.

Job analysis for each position.

Flowcharts for each duty to be performed.

Work habits and dress appropriate to office.

Checked for accuracy with advisory committee.

Brochure or pamphlet produced and distributed.

Plan made for constant evaluation and revision.

Other: ________________________________

______________________________
GUIDELINE XI

STUDENT SELECTION

Guideline X

- determine criteria for eligibility

- students complete application procedures

- personal interviews

- training agreement & orientation

- students start

Guideline XII

Figure 12
GUIDELINE XI - SELECTION OF STUDENTS

Guideline

Students who need, want, and can profit from the experiences provided should be selected for the simulated office experience program.

Purpose and Explanation

As a result of previous student survey, the teacher-director knows who is interested. Students have completed their general orientation period and are now being selected for a position in the working experience. The ideal student for the program should be employable. His grades and adaptability should be good. He should have a wide background of skills to make it easier to perform well. To be successful a student should feel successful; therefore, motivation through interest and knowing he can do a good job is highly important for good performance.

CHECKLIST 18: SELECTION OF STUDENTS

Directions: Check the items that are applicable. Write a policy on student selection. Plan forms to use to select students. Select students. Provide for alternates if desirable. Provide counseling on scheduling. Have an orientation meeting with students and parents. Place students in office rotation schedule for work experience portion of the class.

Students selected on the basis of:

- Grades in previous courses
- Need for program
- Desire for program
- Prerequisites completed
- Personality inventory
- Aptitude or pre-test
- Experience
- I.Q.
- School records
- Discipline records
- Personal interview
- Other: ____________________
**Agreement to include:**

- Rules for attendance
- Work habits
- Dress and grooming
- Make-up work
- Agree to abide by policies of school and class
- Understand credits to be received
- Reports to be made
- Counseling to be made
- Understand duties and responsibilities to school and class
- Responsibility of parents to cooperate
- Responsibility of school to provide adequate training
- Responsibility of teacher-director
- Evaluation factors
- Signature of student
- Signature of parent
- Signature of teacher-director
- Other: ____________________

**Interview:**

- By teacher-director
- By counselor
- By businessman
- By other teacher
- By students
- Appearance
- Application
- Personality
- Intelligence
- Understanding of the program
- Poise and courtesy
- Other: ____________________

_________________________
GUIDELINE XII

Guideline XI

▼

develop plan for publicity

▼

publicize program & students

▼

Guideline XIII

Figure 13
GUIDELINE XII - PUBLIC RELATIONS PROGRAM

Guideline

Effective public relations should be carefully planned to inform the public of the advantages, principles, and goals of the program.

Purpose and Explanation

The simulated program needs support from the school administration, teaching staff, employers, parents, and members of the community. This support can be obtained through an active information program designed to inform these groups. Good public relations revolve around the teacher-director. He should be aware of this when making public contacts and utilize the graduates and the immediate students to inform the public of the program's value.

All communication media should be utilized. Reporters, newscasters, feature writers, and other public information officials are cooperative if proper reporting techniques are used. Business periodicals, reports to faculty and other interested persons through a weekly newsletter, and end-of-the-year report, and contacts with parents will help to boost the program and are excellent vehicles for publicity.

CHECKLIST 19: PUBLIC RELATIONS

Directions: Complete the checklist marking where you wish to have information directed. Plan a schedule of activities. Make contacts with news media and public relations people. Plan an outline of public relations releases. Follow good rules of journalism. Always try to keep the name and purposes of the program before the public. Plan a brochure to give to interested parties or some other written material that is timely.

---

__ Teachers in school
__ Administration
__ Local businesses
__ State and National Clubs
__ State Department of Public Instruction

__ Parents
__ School counselors
__ Community
__ Alumni
__ Other:________________
GUIDELINE XIII

work begins

state where areas of stress are to be

choose instruments to use for student selection

develop the instrument

record and use results

follow-up by relearning

Guideline XII

Figure 14
GUIDELINE XIII - STUDENT EVALUATION PROCEDURES

Guideline

Evaluation is important to enable educators to make intelligent decisions about the quality and quantity of knowledge, skills, and understandings an individual possesses.

Purpose and Explanation

Evaluation should be performed on a flexible and individual basis. Students have to be guided from where they are upon entrance to the program, how they progress, and by the final product. Several types of evaluation, depending on the philosophy of the initiators of the program and the individual students, should be made. In a program of this nature, subjective appraisal of individuals is predominant.

The teacher-director will choose the evaluation proper for each learning unit presented in the general orientation section. The checklists focus primarily on the evaluation of the work experience, but many of the techniques will apply to both areas.

It must be decided what our priorities of evaluation are to be. A certain degree of standardization in any analysis of knowledge must be maintained to compare students. This is why the use of a selected checklist is recommended. Each person has to be considered on the same points if a checklist is used. Techniques of evaluation have been sources of controversy for years, and there is no one best way to be dictated.

Principles to consider include: (1) the criteria must be a product of the instruction, (2) the criteria must be geared to the expected results, (3) the expected outcomes should be stated at several levels from the very general to the very specific, (4) evaluation should be flexible enough to encompass individual differences, and (5) different types of instruments should be developed to cover evaluation.
Several types of instruments include:

1. Self-evaluation - using a progress record or self-rating sheet the student needs to understand his own capabilities.

2. Peer-evaluation - this allows the student to understand how his co-workers see him and make corrections to achieve the best possible interaction.

3. Teacher-evaluation - this allows the student to be rated by a person with knowledge and understanding of the total experience. This is a professional opinion.

4. Standardized tests - either in production skills or understandings shows in an objective way what the student knows.

5. Individual projects and group projects to show how they work with others to accomplish a goal.

When to evaluate and how to evaluate depends on the decisions of the teacher-director and his advisors.

An orientation of the evaluation techniques to be used should be provided. Explanation of ratings should always be made and re-learning programs set up. Evaluation must be continuous, not just a point-in-time judgment.

**CHECKLIST 20: STUDENT EVALUATION**

**Directions:** Complete the checklist to select areas of evaluation to stress. Select specific items to evaluate. Develop instruments around areas determined important. Develop a plan of use. Put the program into practice. Revise as needed.

**General factors to be stressed:**

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<thead>
<tr>
<th>Quality</th>
<th>Individual effectiveness</th>
<th>Understandings test</th>
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<tr>
<td>Quantity</td>
<td>Group effectiveness</td>
<td>Subjective supervision</td>
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<td>Understandings</td>
<td>Answers correct</td>
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<td>Skill</td>
<td>Method correct</td>
<td>Progress chart</td>
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<td>Immediate feedback</td>
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<td>Definite standards</td>
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<td>Weekly audits</td>
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<td>Detailed check</td>
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<td>Random audits</td>
<td>Production tests</td>
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<td>Teacher evaluation</td>
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Skills:

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<th>Dictation</th>
<th>Grammar</th>
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<td>Speed</td>
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<td>Flow of work understandings</td>
<td>Calculation</td>
<td>Arithmetic</td>
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<td>Telephone</td>
<td>Adding Machine</td>
<td>Keypunch</td>
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<td>Completes jobs on time</td>
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<td>Unit Record Equipment operation</td>
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<td>Typing</td>
<td>Penmanship</td>
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<td>Duplicating</td>
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Business Techniques:

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<th>Meet people</th>
<th>Use reference material</th>
<th>Respects others</th>
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<tbody>
<tr>
<td>Follows directions</td>
<td>Plans ahead</td>
<td>Jobs completed on time</td>
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<tr>
<td>Understands instructions</td>
<td>Initiative to adapt to new ideas</td>
<td>Ability to plan and organize</td>
</tr>
<tr>
<td>Attends to details</td>
<td>Public relations</td>
<td>Observing of safety rules</td>
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<tr>
<td>Keeps on the job</td>
<td>Works well in a team</td>
<td>Observing of office rules</td>
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<td>Organized work</td>
<td>Concentration</td>
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<tr>
<td>Sense presence of problem</td>
<td>Ability to plan and organize</td>
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<tr>
<td>Recognizes nature of problem</td>
<td>Ability to plan and organize</td>
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<tr>
<td>Makes correct decisions</td>
<td>Ability to plan and organize</td>
<td></td>
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<tr>
<td>Judicious use of equipment and supplies</td>
<td>Ability to plan and organize</td>
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<tr>
<td>Neat</td>
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Personality:

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<th>Takes criticism</th>
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<th>Confidential</th>
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<tbody>
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<td>Appearance</td>
<td>Punctuality</td>
<td>Loyal</td>
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<td>Manners</td>
<td>Judgment</td>
<td>Sense of humor</td>
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<td>Health</td>
<td>Responsibility</td>
<td>Oral expression</td>
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<td>Personal hygiene</td>
<td>Desire to do a good job</td>
<td>Self-control</td>
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<tr>
<td>Speech</td>
<td>Tact</td>
<td>Memory</td>
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<td>Adaptability</td>
<td>Observation</td>
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<tr>
<td>Initiative</td>
<td>Courtesy</td>
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<td>Tact</td>
<td>Leadership</td>
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<tr>
<td>Cooperation</td>
<td>Industry</td>
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</table>

Instruments for Evaluation:

| Time spent in class | Accuracy | Confidential |
| Time spent out of class | Loyal | Sense of humor |
| Jobs done for week   | Responsibility | Oral expression |
| Errors made on each job | Desire to do a good job | Self-control |
| How handled errors in work for a stated period | Tact | Memory |
| Description of new jobs, methods, or processes used for week | Observation |               |
| Description of problems would like more help with | Courtesy |               |
| Description of most interesting experience for each period | Leadership |               |
| Suggestions for improvement of work done for period | Industry |               |
| Relation of this job to previous jobs |               |               |

Periods will be rating the students: ________________________________
GUIDELINE XIV

PROGRAM EVALUATION

Guideline XIII

- review program

- make necessary reports

- follow-up of students

- revise

- implement changes

Guideline XV

Figure 15
GUIDELINE XIV - PROGRAM EVALUATION

Guideline

Only through a system of constant revision and revitalization of the program, as exemplified in written reviews and student follow-up studies, can the program be most effective.

Purpose and Explanation

A program must be well-documented and periodically reviewed. As funds from various sources are involved, a series of reports showing how these funds are used must be prepared. Details of the program accompanied by anecdotal records will show changes that may need to be made in the future. Students on the job that have received this type of training are perhaps the best determiners of the effectiveness. For this reason, emphasis is placed on a follow-up study.

By reviewing the program and evaluating it as a whole and by specifics, it can be kept sound at all times. Some of the items we will be looking for are:

1. Student-learner attained acceptable or better level of technical background and has attained skill adequate to perform in his chosen trade.

2. Student-learner can use resource materials and manuals in trade.

3. Student-learner attained a feeling of dignity for work to extent has potential to succeed in chosen occupation or related occupations.

4. Student-learner communicates with supervisor and fellow workers.

5. Student learner is able to coordinate activities.

6. Student-learner is able to produce the quality work desired in a quantity that meets standards of the trade.

7. The kinds of persons attracted to the program with respect to their background and personal characteristics.
8. The staying power exerted by the program in terms of the numbers starting, the numbers finishing and the differences which can be noted regarding the two groups.

9. What happens to the graduates of the program on a short and long-term basis.

10. The general effectiveness of graduates of the program compared to beginning office workers prepared by traditional programs.

11. The acceptability of the product to the employer.

12. A system of feedback from all relevant groups affected by the program which will serve to assist in continually refining the program.

Short and long-range views need to be obtained. It will be up to the discretion of the teacher-director and federal, state, and local requirements as to how often and what reports need to be made. A minimum should be a complete formal review every five to seven years requiring resurveys and extensive follow-up. Review of the program receives much more emphasis during the initial years than after it has been established.

CHECKLIST 21: ITEMS TO CONSIDER IN PROGRAM EVALUATION

Directions: Complete the checklist by marking items that are to be continued and those that should be revised. Take appropriate action to do what is suggested in your evaluation of the item. Complete a written report adding notes for future revision. Plan revisions. Implement revisions.

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<tr>
<th>Satisfactory</th>
<th>Revise</th>
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<td>1. Starting date</td>
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<td>2. Closing date</td>
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<td>3. Length of course</td>
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<td>4. List of students, grade, age</td>
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<td>5. Names of advisory committee and organizations they represent</td>
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<td>6. Number of students</td>
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<td>Total hours student in class</td>
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<td>Breakdown of hours by various phases of class</td>
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<td>3</td>
<td>Organization of model offices</td>
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<td>4</td>
<td>Number of hours spent in coordination</td>
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<td>5</td>
<td>Number of advisory committee meetings</td>
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<td>6</td>
<td>Classroom facility activities</td>
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<td>Support of parents</td>
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<td>Support of administration</td>
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<td>Support of business</td>
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<td>Support of faculty</td>
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<td>11</td>
<td>Labor, organizations, and school administrators</td>
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<td>12</td>
<td>Recruitment procedures</td>
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<td>13</td>
<td>Guidance and testing</td>
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<td>14</td>
<td>Qualifications and preparation of teacher-director</td>
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<td>15</td>
<td>Settings and recommended changes</td>
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<td>16</td>
<td>Rotation schedule</td>
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<td>17</td>
<td>Student and teacher-director contacts with businessmen</td>
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<td>18</td>
<td>Facilities and recommended changes</td>
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<td>19</td>
<td>Public relations activities</td>
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<td>20</td>
<td>Enrolment standards</td>
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<td>21</td>
<td>Typical weekly schedule for student</td>
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<td>22</td>
<td>Typical weekly schedule for teacher-director</td>
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<td>23</td>
<td>Instructional pattern for pre-employment training</td>
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<td>24</td>
<td>Typical weekly schedule for teacher-director</td>
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<td>Instructional pattern for pre-employment training</td>
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<td>Typical weekly schedule for teacher-director</td>
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<td>Public relations activities</td>
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<td>32</td>
<td>Enrolment standards</td>
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</tbody>
</table>
33. Advantages and/or disadvantages to be considered
34. Supervision available
35. Regular or scheduled conferences with students
36. Review of student progress and performance
37. Records
38. Career possibilities covered
39. Objectives met
40. Budget policy and receipts and expenditures accounted for
41. Individual instruction provided
42. Standards of achievement comparable to standards of beginning office worker
43. Classroom instructional materials suitable
44. Instruction carefully planned in advance
45. Instruction includes a variety of teaching methods
46. Full advantage is taken of community resources
47. Training stations are well organized
48. Proper attitudes: personality, responsibility, loyalty have been developed
49. Follow-up records

CHECKLIST 22: REPORTS TO BE MADE

Directions: Check reports need to be made. Plan a chart showing the purpose, who it is prepared by, the due date, the number of copies, and who receives the report. Get specific details for reports. Make reports. Use total of reports to document an overall picture of the program as a year-end report.

Annual major report to superintendent, advisory committee, director of vocational education, counselor, department head, and state staff

Initial enrollment showing name, sex, age, grade level, career objective, and type of experience
Annual contract to justify expenditure of public funds: name of director, salary, number of students, etc.

Monthly report of enrollment to aid in determination by state staff of the amount of vocational training being done

Annual report and application for reimbursement

Report requesting funds for coming year and application for program

Annual descriptive and statistical records of individual achievement

Surveys

Equipment requests, purchases, and record of repair

Library requests

Supplies requests

Inventory

List of activities involving the community

Club program report

Graduate follow-up

Student selection

Other: ______________________

_________________________

CHECKLIST 23: ITEMS FOR FOLLOW-UP STUDY

Directions: Mark the items that you wish to use. Develop the follow-up instrument. Conduct the study. Analyze the results. Implement any changes needed to provide a better program.

Time required to get first full-time job

Methods used to get first full-time job

Relatedness of first job to course studied

Initial and terminal earnings on jobs held

Satisfaction ratings on jobs held
Relatedness of all jobs held to course studied
Geographic mobility of vocational graduates
Employment security since graduation
Employer stability since graduation
Earnings progression since graduation
Amount and type of post-high school education
Amount and type of college-level education
Non-vocational measures reflecting personal growth
Supervision in school adequate
Well-rounded program of learning experiences provided in school
Classes that related most to work
Classes that don't relate to work
Were the simulated experiences "realistic"?
Have you reached your career objective?
Other: ______________________
_________________________
GUIDELINE XV

SUPPLEMENTARY PROGRAMS

Guideline XIV

\[\begin{align*}
\text{decide type of program needed} \\
\text{set up an in-service plan} \\
\text{set up a club program} \\
\text{organize students to handle the program} \\
\text{Summary}
\end{align*}\]
Guideline XVI - SUPPLEMENTARY PROGRAMS

Guideline

To provide for individual differences and develop a well-rounded citizen, extra projects and club organization may be developed.

Purpose and Explanation

In establishing supplementary programs, educators realize learning takes place at all times and in various forms. Many are quite sure that more often than not things learned outside the classroom, not part of the formal education, make a lasting impression and influence habits, attitudes, and future life. Students love to belong and see self-accomplishment.

Factors involved in planning auxiliary projects to supplement classroom learning include:

- the desire to excel
- the desire for gregariousness and belongingness
- self-assertion
- enjoyment
- leadership development

The appeal of the supplementary programs is personal, student-interest centered, there is very little written work unless chosen, there is little grading weight (if any) given, and there is no instructor or little guidance, so students are on their own.

Supplementary programs are designed to provide added work for fast students, perhaps giving extra credit. The two basic types to be discussed here include in-service clinics and a clerk-program-based club. After reviewing the brief presentation, the teacher-director may develop a program, or preferably, guide the students in developing the program.
In-service clinics

Clinics may be called at regularly-scheduled times or when problems or a special event may arise. Businesses are now conducting these clinics to improve work as problems are discussed and improvements suggested. Occupational guidance and other education programs can be presented by the students. The students can handle the whole program, which provides them with leadership and organizational training. It is suggested that some form of extra credit be devised that probably has minor bearing on the actual grade. This is an excellent way to handle students who finish their regular work early.

Clubs

Clubs maximize learning opportunities, expose students to a variety of experiences, develop social and leadership skills, enhance the total office education program, develop occupational understandings, and provide group project planning and participation. Through the club and in-service training programs, the teacher becomes better acquainted with the students, obtains publicity through activities, and provides an avenue of follow-up through the alumni group.
CHAPTER VI

SUMMARY

The major aspects of planning, implementation, and evaluation of a simulated office experience program have been reviewed, and the simulated office experience program should be effectively in operation or ready to start. Teachers and students will find this method of presenting an office practice course innovative and effective. Educators, businessmen, and community leaders have been consulted either in person or through professional literature. Following is a summary checklist that incorporates knowledge accumulated while preparing for and writing this thesis:

SUMMARY CHECKLIST OF SIMULATED OFFICE EXPERIENCE PROGRAM DEVELOPMENT

Directions: Complete the checklist by marking the items that have been considered and implemented. If items are not completed, review the relative sections and make plans to complete them if needed. Items that have been starred should be in writing.

Guideline I - Definition of the Problem

General reference: (Chapter I pages 1-2, Chapter II pages 19-23, Chapter III pages 25-30, Chapter V pages 57-62, Figure 1 page 53, Figure 2 page 57, Appendix page 131, Bibliography pages 146-151)

____ Understand the characteristics of the program. (Chapter II pages 10, 12, 19, Chapter IV pages 31-37, Checklist 1 page 59)

____ Understand the advantages and disadvantages. (Chapter II pages 19-23, Chapter IV page 35)

____ *Developed a written philosophy for the course. (Chapter II pages 9-12)
*Developed a written purpose for the course. (Chapter II pages 9-12)

*Developed a written set of objectives for the course. (Chapter II pages 9-12, Chapter IV page 34, Checklist 2 page 61)

**Guideline II - School Factors to Consider**

General reference: (Chapter II pages 4-6, Chapter V pages 63-73, Figure 1 page 53, Figure 3 page 63)

__ Placed course in compatible school curriculum. (Checklist 3 page 67)

__ Determined cooperation of administrators, faculty, and students. (Checklist 3 page 67)

__ Determined student need for the program. (Checklist 3 page 67)

__ Selected proper teacher. (Chapter IV page 36 and Checklist 7 page 71)

* Have written an administrative proposal and policy for approval. (Checklist 6 page 69 and Appendix page 139)

* Determined if school personnel records are adequate and complete and determine written policy governing their use. (Checklist 5 page 68)

* Put into the course outline prerequisites, grade placement, and course description. (Checklist 4 page 68 and Appendix page 135)

**Guideline III - Advisory Committee**

General reference: (Chapter V pages 73-77, Figure 1 page 53, Figure 4 page 73, Checklist 8 page 75)

__ Selected advisory committee. (Chapter IV page 34 and Chapter V pages 73-76)

__ Oriented and organized advisory committee. (Chapter V page 75)

* Determined plan of action for advisory committee. (Chapter V page 75)

* Have written a policy statement governing use of an advisory committee. (Chapter V page 76)

**Guideline IV - Community Survey**

General reference: Chapter IV page 31, Chapter V pages 77-81, Figure 1 page 53, Figure 5 page 77, Bibliography page 152)
Community survey policy established. (Checklist 9 page 79)

*Questionnaire and introduction prepared. (Checklist 10 page 80)

*Questionnaire and introduction implemented. (Checklist 10 page 80)

*Questionnaire analyzed and conclusions drawn. (Checklist 10 page 80)

Guideline V - Organization

General reference: (Chapter II pages 19-24, Chapter IV pages 31-37, Chapter V pages 82 and 83, Figure 1 page 53, Figure 6 page 82, Bibliography page 153)

Determined if clerical and secretarial office practice students will be in the same class. (Chapter IV page 32 and Checklist 11 page 83)

Determine if high and low-ability students shall be enrolled. (Chapter IV page 37 and Checklist 11 page 83)

Determined how many offices shall be used. (Chapter IV page 36 and Checklist 11 page 83)

Determined how many companies shall be represented. (Chapter IV page 36 and Checklist 11 page 83)

Determined how many positions within each office. (Chapter IV page 36 and Checklist 11 page 83)

Determined the rotation plan. (Chapter IV page 36 and Checklist 11 page 83)

Have written policy statement on organization of program. (Chapter IV page 33 and Checklist 11 page 83)

Guideline VI - Business Survey

General reference: Chapter II pages 12-18, Chapter III pages 40-49, Chapter IV pages 38-49, Chapter V pages 85-90, Figure 1 page 53, Figure 7 page 85; Bibliography page 152)

Determined what company(ies) need to be analyzed for the development of the program and made proper contacts. (Chapter IV pages 36, 38-49 and Checklist 13 page 90)

Analyzed the company(ies) policies and procedures. (Chapter IV pages 36, 37-49 and Checklist 13 page 90)
*Compiled completed flowcharts, narratives, and job instruction sheets for all procedures and policies used by the company(ies). (Chapter IV pages 36-39, Checklist 12 page 88, Checklist 13 page 90)

Guideline VII - Facilities, Equipment, and Supplies

General reference: (Chapter V pages 91-94, Figure 1 page 53, Figure 8 page 91, Bibliography page 152)

- Determined what equipment you want to be included. (Chapter IV page 41 and Checklist 14 page 93)
- Determined space needed to consult, study, and work. (Appendix page 145 and Checklist 14 page 93)
- *Drawn floor plan and written up specifications. (Appendix page 145 and Checklist 14 page 93)
- *Ordered changes in facilities. (Checklist 14 page 93)
- *Ordered equipment needed. (Chapter IV page 42 and Checklist 14 page 93)
- *Ordered supplies needed. (Chapter IV page 42 and Checklist 14 page 93)
- *Arranged room for class. (Checklist 14 page 93)
- *Inventory. (Checklist 14 page 93)

Guideline VIII - Content

General reference: (Chapter V pages 95-97, Figure 1 page 53, Figure 9 page 95)

- Selected content for general orientation. (Chapter IV page 34 and Checklist 15 page 96)
- *Have written outline for course content. (Appendix page 135 and Checklist 15 page 96)
- *Developed units to supplement course outline. (Chapter V page 121, Checklist 15 page 96, Chapter IV page 37)
- Selected content for specific orientation. (Chapter IV page 34 and Checklist 15 page 96)
Guideline IX - Materials

General reference: (Chapter II pages 19-24, Chapter V pages 98-101, Figure 1 page 53, Figure 10 page 98, Bibliography page 153)

___ *List of representative correspondence developed. (Checklist 16 page 100)

___ *List of representative forms developed. (Chapter IV page 40 and Checklist 16 page 100)

___ *List of inputs to experience developed. (Checklist 16 page 100)

___ *List of accounts receivable developed. (Checklist 16 page 100)

___ *List of accounts payable developed. (Checklist 16 page 100)

___ *List of inventory developed. (Checklist 16 page 100)

___ *List of emergency materials developed. (Checklist 16 page 100)

___ *List of decision-making situations developed. (Checklist 16 page 100)


___ *Policies and Procedures Manual for the company(ies) including description and policies, organization chart, job descriptions, and detailed directions to be published, distributed, and discussed with students. (Chapter III pages 25-30, Chapter IV pages 38-49, Chapter V pages 102-104, Figure 1 page 53, Figure 11 page 102, Checklist 17 page 103, and Appendix page 144)

Guideline XI - Select Students

General reference: (Chapter IV pages 32, 33, and 36, Figure 1 page 54, Figure 12 page 105, Checklist 18 page 106)

___ *Students filed applications. (Chapter V page 106)

___ *Students signed agreements. (Chapter V page 106)

___ Students have had private interviews. (Chapter V page 105)

___ *Orientation program completed. (Chapter V page 105)

___ Students placed in training stations. (Chapter V page 105)

Guideline XII - Public Relations

General reference: (Chapter V pages 109, 110, Figure 1 page 54, Figure 13 page 108)
Developed a program of public relations. (Checklist 19 page 109)

*Developed a list of news media and personnel in charge. (Checklist 19 page 109)

Guideline XIII - Student Evaluation

General reference: (Chapter V pages 110-114, Figure 1 page 54, Figure 14 page 110, Chapter IV pages 33 and 36, Bibliography page 151)

*Developed instruments and records to use for evaluation. (Checklist 20 page 112, Appendix page 141)

Developed a well-rounded plan of evaluation, implementation, and analysis of student records. (Checklist 20 page 112)

Used various evaluation measures. (Chapter IV page 33, Appendix page 141, Checklist 20 page 112)

*Plan for constant revision and evaluation of content and procedures as revealed by student evaluation. (Chapter V pages 114-120)

Guideline XIV - Program Evaluation

General reference: Chapter V pages 114-120, Figure 1 page 54, Figure 15 page 114, Bibliography pages 146-151)

Reviewed total program. (Checklist 21 page 116)

*Made necessary reports. (Checklist 22 page 118)

*Conducted follow-up program. (Checklist 23 page 119)

Developed and implemented needed changes.

Stabilized plans for the coming year.

Guideline XV - Supplementary Programs

General reference: (Chapter V pages 121-123, Figure 1 page 55, Figure 16 page 121)

Decided on supplementary programs to use.

*Established schedule for in-service clinics and assign.

*Established and organized a club program.

Provided only enough guidance to see that the supplementary programs were well handled.
The procedure developed in this study provides a means for the careful development of a philosophy and understanding of the simulated office experience program and for the construction of a program fitted to the needs of the individual and the particular teaching situation. The result should be a meaningful experience in office education for the student.
QUESTIONNAIRE ON SIMULATED OFFICE EXPERIENCE PROGRAMS FOR HIGH SCHOOLS

This questionnaire is to be completed on the basis of your experience and reading in providing realistic and valuable educational experiences for high school students. The simulated office program is a capstone course to be presented in the senior year.

Please fill out the questions listed below to the best of your knowledge, using whatever education and experience you have. It would be appreciated if thought could be given to utilization of data processing equipment, source material, and techniques in each category.

Your ideas are confidential and sincerely appreciated, for each person has something unique to offer. A blank sheet is attached for additional suggestions. Information compiled from your ideas will be used for thesis material.

Name ___________________________ Date ___________________________

Education experience (years completed) _____ (major)____________________

Office experience (years)___________ (type of work)_____________________

Teaching experience (years) __________ (grade levels)____________________

(subjects)________________________________________________________________

(office practice - please note if you had an experience similar to or a simulated office program and any comments you have relating to this.)

________________________________________________________________________

________________________________________________________________________

Address after this quarter or permanent home address

________________________________________________________________________

Your reactions to the need for a study to develop guidelines for establishing a simulated office.

________________________________________________________________________

________________________________________________________________________
1. How would you organize the simulated office experience?
   A. How many offices? 1 2 3 4 5 other __________________
   B. What type of office(s)?
      1. One company, different positions within.
      2. Different occupational areas, several offices.
      3. Use different types of occupations and different office situations, i.e. medical, one girl; insurance, steno pool; manufacturing, positions according to organizational chart.
      4. Practice sets, using office procedures.

2. What steps would you advise a teacher to take in setting up a complete program?

3. How long a time would you estimate a teacher needs to establish a program of this nature? What would be the best way to get this time?

4. What areas of difficulty do you perceive in setting up a program?

5. Would you establish a clerical and secretarial office practice as two separate units or incorporate them into one office practice? Why?

6. How many students would you assign to the total class?__________
   To each office?______
7. How would you assign the students?
   __ Rotate each student between each office; one position each office.
   __ Rotate each student in each position in each office.
   __ Rotate each student in each position in one office.
   __ Assign student to one position and have in-service training to
     orient them to the other jobs.
   __ Other.

8. What minimum prerequisites would you require?

9. What basic equipment would be needed?

10. How would you evaluate the office experience?

11. Do you feel an advisory committee would be valuable?

12. What length of time would you devote to the program?
   __ general orientation
   __ specific orientation
   __ actual work experience

13. What would be your objectives in a class of this nature?

14. What are the advantages and disadvantages comparing the simulated
    office experience with cooperative work experience, work experience,
    and a structured classroom office practice?

15. What occupational areas should be covered?
16. Do you feel occupational areas covered should correlate with a study of the office openings in the particular area?

17. What educational experiences are common to all positions?

18. What does a teacher need to understand before attempting a program of this nature?

19. What comments do you have relating to enrolling low and high-ability students in the same class?

20. Do you think a follow-up of students is needed?

21. Do you think the information flow should be rigidly established using flowcharts, or flexible using a basic flow but the teacher interjecting a number of exceptions?

22. How do you feel about setting a certain period aside at a pre-announced time for in-service meetings to cover such things as grooming, attitude development, and occupational guidance?

Please put additional comments on the back.
SIMULATED OFFICE EXPERIENCE

Statement of the Problem

To develop a realistic, challenging, and comprehensive laboratory experience for students in office education that will fulfill their individual needs in obtaining the skills and understandings necessary to be successful at the entry level of office occupations.

Philosophy

The course will transmit the cultural heritage of our way of life, improve the social structure of the environment in which people live and work, and provide for the individual needs of the people who live in our democratic society. Vocational education presupposes that the student is primarily directed to occupational preparation. Preparation will involve the attitudes, understandings, and skills which will enable the student to adjust more adequately to the duties and responsibilities of an ethical citizen and worker in his chosen field. The business office occupational program is directed to one primary goal, gainful employment as an office worker. A simulated office experience program will provide the adequate knowledge for decision making and use of specific forms and equipment to provide occupational guidance and skills necessary before entering the job.

Purpose

The purpose of the simulated office experience program is to provide an understanding of the requirements of working with others in an office, the importance of accuracy and neatness as it relates to a sequence of activities in office work and the standards of production required to keep the flow of work efficient and smooth. It is the purpose to transmit creative and innovative office procedures from the real world of business to the learning situation of the school to bridge the gap between school and the world of work. It is the purpose to give every student an opportunity to be successful at his maximum level of efficiency. It is the purpose to replicate office tasks of the business world—structure, concepts, vitality, and dynamics.

Objectives

The simulated office experience program should be established to provide for each student learner in the class an opportunity for:

1. Development of sophistications with regard to employment that are comparable to those which would be developed in a cooperative education program or an on-the-job training program.

3. Development of initiative and a sense of responsibility for the quality and quantity of production.

4. Understanding of the relationship among different work stations in an organization—an understanding of the flow of work.

5. Further development of the skills and knowledges previously learned to occupational standards.

6. Development of an understanding of the occupations which exist and the employment requirements for these occupations.

7. Development of an understanding of the businesses of the community and their relationship to each other.

8. Development of the ability to work harmoniously with others—development of effective human relationships.

9. Further development of efficient work habits.

10. Development of knowledge about and skill in performing various office tasks.

11. Development of knowledge about and skill in using such documents as flowcharts, office manuals, procedure manuals, and organizational charts.

12. Refinement of knowledges and skills according to individual needs (remedial instruction, etc.)

13. Development of capability to secure employment, to maintain employment, and to advance in employment.

Grade Placement

Grade twelve. Each student shall be so placed in the sequence of business and office education courses that the student enters employment directly from the simulated office experience; this means just prior to graduation or to leaving school to enter upon a business office career.

Prerequisites

1. Have fulfilled all prerequisites for the course (typing I and II) with a "C" mark or above. Desirable prerequisites will be bookkeeping and general business.

2. Have ability to profit by the instruction and possess the personal qualifications required for employment in the type of work for which the training is offered.
3. Have identified a career objective for which the simulated office experience program will be an essential part of the total preparation.

4. Have the personal characteristics, knowledge, and skills the teacher-director deems important for success in the program.

Course Description

The course is a capstone course designed for final preparation of students before entering an office occupation. It is composed of a series of classroom units designed to supplement any knowledge not already clearly understood or to introduce material not presented in the previous sequence of courses that is necessary for success in the simulated office experience program. Each student in the simulated office experience program will be assigned to the performance of a variety of major tasks of which the office occupation for which he is preparing is comprised.

Time Requirement and Organization

Approximately 500 minutes a week with at least a minimum of one semester in a related learning program and one semester in a supervised work experience should be provided.

Selected business office education students will participate in a period of general orientation consisting of eight weeks, specific orientation to the simulated program for one week, and simulated experience related learning for ten weeks. The work experience would be for one semester.

Students will be working for the ACE Manufacturing Company consisting of four separate office divisions. Five students will be assigned to positions within each of the four offices and rotated among offices after satisfactory completion of work for a period of four weeks in each office. Orientation and an understanding of the other positions in the office will be provided by fellow workers and the teacher-director. Two weeks of flexible time is provided for in-service training meetings and evaluation.

Enrollment

A maximum of 25 students should be enrolled per consecutive two-hour class period. Clerical and secretarial students will be enrolled in the same class. Students of varying abilities will be enrolled in the same class.

Credit

One unit will be received for successful completion of one year.
Course Outline

General Orientation

Today's office worker
Personal effectiveness on the job
Business procedures and flow diagrams
Introduction to data processing
Filing
Telephone and reception
Handling mail
Writing business letters
Office equipment and supplies
Business papers and forms
Bookkeeping and general business review
Legal aspects of conducting a business
Economic aspects of conducting a business
A rotated review of typing, office machines, duplicating methods, and dictaphone/shorthand

*A general knowledge of the above is needed, because the simulated work experience will provide relearning and reinforcement of learning.

Specific Orientation

Applying for job
Acquaintanceship with Policies and Procedures Manual
Acquaintanceship with reference books available
Development of office routine
Development of office human relations
Development of work habits
Evaluation and other rules and regulations of the program

Simulated Office Experience Program

Evaluation

Minimum standards should be set in accordance with employment standards for initial employment in the local area or in the area in which the student seeks employment. Weekly progress charts will be handed in at the end of each grading period. Individual conferences will be held after self-analysis, classmate analysis, and teacher analysis has been completed. A standardized test will be given upon completion of the program.
SAMPLE OUTLINE - ADMINISTRATIVE POLICIES CONCERNING THE SIMULATED OFFICE EXPERIENCE PROGRAM AT _______ HIGH SCHOOL

I. Objectives and purposes of program.

II. Provisions for supervision and administration of the program.
(A description of personnel involved, line and staff responsibilities, and provisions for supervision should be included. An organizational chart of vocational education program should be submitted if necessary.)

III. Duties of teacher-director.
   A. Teaching.
      1. Non-vocational.
      2. Pre-planning.
      3. Related instruction.
   B. Directing.
      1. Simulated office experience.
      2. Club program.

IV. Provisions for an extended contract or released time for director.

V. Program of instruction.
   A. Content of general instruction.
   B. Content of work experience program.
      2. In-service training.
   C. Describe procedure used to assure that the nature and content of instruction are based on occupational needs.

VI. Program of office experience training using simulation.
   A. Describe criteria for selecting students.
   B. Describe criteria for placement of students and rotation schedule.
   C. Describe procedures used to insure that a maximum of class time will be used in the simulated work experience program.
   D. Describe procedures used to insure a well-rounded program of simulated training.

V. Enrollment in the program. (Include who may enroll, the scheduling, and the number that should be maximum, etc.)
VIII. Provision for the local club program.

IX. Provision for facilities and equipment.
   (Describe classroom and other facilities, equipment, and supplies
   available, and briefly outline plans for their use. If now considered
   inadequate, describe plans for improvement.)

X. Provision for advisory committee.
   A. Selection procedures.
   B. General duties and responsibilities.

XI. Procedures for surveys and follow-up studies.

XII. Procedures for local evaluation.
   A. Classroom instruction.
   B. Simulated office experience.
   C. Entire classroom program.

XIII. Provisions for further training of teacher-director.

XIV. Provisions for public relations and use of speakers and field
     trips as resources.

XV. Reports.
    (Describe provisions for periodic statistical and descriptive
    reports of activities by the teacher-director which are prepared
    for the administration, improvement of the program, and the state
    and national supervisors.)

XVI. Provisions for application for Federal funds.
    (Describe approach to be used in obtaining funds for the development
    and enlargement of the program.)

XVII. Forms.
     (Submit one copy of each of the various forms used by the program,
     such as application for admittance, evaluation forms, agreements,
     schedule of experiences, survey forms, etc.)

XVIII. Responsibilities.
    A. School.
    B. Vocational Division of State Department of Public Instruction.
A SAMPLE FORM - ESSAY TO WRITE BEFORE CHANGING JOBS

The Office in Which You Work

1. Describe in general the type of business firm in which you are employed and the service or commodity in which it deals.

2. Explain briefly the major function(s) which your office performs in support of the total business operation.

3. In which of the above functions are you working and training? Define your position and give your job title.

4. Describe in some detail your major tasks and responsibilities in the day-to-day performance of your duties. List your daily routine and tell of some of the exceptions that come up.
5. There are various kinds of typed materials produced in offices, i.e., letters, manuscripts, forms, cards, memos, etc. What kind of typed materials are prepared by you in your present position? What portion of the average day do you devote to typing?

6. What are the job competencies in taking dictation and transcription required in your position? How much time do you devote to this each day?

7. What skills does the filing done in your position require, other than knowing the alphabet? Describe the filing system used in your job and explain why it is designed as it is.

8. Is records management an integral part of the office or firm where you are working? Does your work contribute to the records management program? How?

9. The verification of figures and written materials is of great importance in all offices. Describe in detail the extent to which you are required to verify either your own work assignments or those prepared or partially prepared by someone else.

10. What office machines do you use? What are the main jobs you do using office machines?
11. How can your present position be improved?

12. Explain your individual progress since starting this position.

13. What previous learning was most important in doing your job?

14. What advanced office positions may be obtained through a greater development of the skills you are using in your present position?

15. Attach a sample of the forms you used and give a description of the procedures used to process each one.
Nature and Objectives

Organization Chart

Part I General
  Evaluation, Promotion and Transfer
  Absence from Work and Lateness
  Vacation Schedule
  Suggestion Program
  Personal Mail and Telephone Calls
  Responsibility of Various Departments

Part II General Office
  A. Receptionist
  B. Clerk-Typist
  C. Clerk, General
  D. Secretary
  E. Message Center and Mail Room

Part III Accounting Department
  A. Payroll Clerk
  B. Posting Clerk
  C. Disbursing Clerk
  D. Billing Clerk
  E. Financial Officer

Part IV Shipping and Receiving Department
  A. Receiving Clerk
  B. Stock Clerk
  C. Clerk-Typist
  D. Shipping Clerk

Part V External Office

Part VI Flow Charts
  Figure 1 Sales Orders and Invoices
  Figure 2 Sales Returns and Allowances
  Figure 3 Requisition, Issue and Purchase Orders
  Figure 4 Central Filing, Storage and Personnel Records
  Figure 5 Requests for Duplication
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