


1956

An Investigation of Elementary School Filing Methods

Richard Perry Comstock
Central Washington University

Follow this and additional works at: <https://digitalcommons.cwu.edu/etd>

 Part of the [Educational Administration and Supervision Commons](#), and the [Other Education Commons](#)

Recommended Citation

Comstock, Richard Perry, "An Investigation of Elementary School Filing Methods" (1956). *All Master's Theses*. 138.
<https://digitalcommons.cwu.edu/etd/138>

This Thesis is brought to you for free and open access by the Master's Theses at ScholarWorks@CWU. It has been accepted for inclusion in All Master's Theses by an authorized administrator of ScholarWorks@CWU. For more information, please contact pingfu@cwu.edu.

AN INVESTIGATION
OF ELEMENTARY SCHOOL FILING METHODS

A Thesis
Presented to
the Graduate Faculty
Central Washington College of Education

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

by
Richard Perry Comstock

August 1956

APPROVED FOR THE GRADUATE FACULTY

Donald J. Murphy, COMMITTEE CHAIRMAN

T. Dean Stinson

Clifford P. Wolfsehr

Dedicated

to

My Wife

Gladys Willene

Whose understanding and patience

Has contributed to a great heritage

ACKNOWLEDGMENT

The writer wishes to express his sincere appreciation to Dr. Donald J. Murphy for encouragement, guidance, and direction in the completion of this study.

Special acknowledgment is extended in appreciation to Mr. Clifford Wolfsehr and Dr. T. Dean Stinson for serving on the Graduate Committee.

To Mr. Paul F. Furgeson, Superintendent of Schools, and Principals, Mr. Wilbur R. Brown, Columbia Elementary School; Mr. Everett A. Watt, Lewis and Clark Elementary School; Mr. Keith Haskins, Stevens Elementary School, Wenatchee; Mr. Claire Boys, Eastmont Elementary School, East Wenatchee; Mr. Mayo Wristen, Winlock Grade School, Winlock; Mr. John Brearley, Lincoln Elementary School, Toppenish; Mr. Tom Mattoon, Skamokawa Grade School, Skamokawa; Mr. John Burnell, Cascade Elementary School, Ellensburg; Mr. William H. Shawver, River View Elementary School, Kennewick, Washington, special thanks are extended for the courtesies and assistance given.

TABLE OF CONTENTS

CHAPTER	PAGE
I. INTRODUCTION	1
Purpose of the study	1
Method of research	2
Procedure of the investigation	2
The pilot study	2
Design of the questionnaire	2
Limitations of the study	3
Limitations of school participation	3
Definitions of terms used	4
Pilot study	4
Questionnaire method	4
Interview method	4
Assimilation of material	4
Standard filing procedure	4
Organization of the paper	5
II. REVIEW OF LITERATURE	7
Anecdotal material on the history and problems of filing systems	7
Accepted practices in good filing systems	13
Types of filing classification	13

CHAPTER	PAGE
The alphabetic process	14
The subject process	15
The numeric process	17
The geographic process	18
III. DESIGN OF THE QUESTIONNAIRE	19
Questionnaire organization	19
Territory of development	19
Basis for tentative questionnaire	19
Pilot study questionnaire form	21
The pilot study form	21
Pilot study questionnaire conclusions	21
Conclusions of tentative questionnaire	21
Permanent questionnaire design	22
Basis of permanent questionnaire design	22
Permanent questionnaire process	23
Method of file investigation	23
Form of permanent questionnaire	23
IV. RESULTS OF QUESTIONNAIRE SURVEY	25
Existing methods employed	25
Methods in use.	25

CHAPTER	PAGE
Materials classified	26
Handling of materials	26
Materials used.	28
Manner and content	28
V. THE SUMMARY	33
The review	33
Review of the value of proper materials	33
Filing Phases in existence.	34
Recording phases in existence	34
VI. THE CONCLUSIONS	37
The purpose and value of proper materials	37
The responsibility	37
Responsibility of the central office	37
Trends	38
Present trend	38
Principal's role	38
The role of the principal	38
In conclusion	39
In fulfillment of educational aims	39
Of organization and obligations.	39

CHAPTER	PAGE
VII. RECOMMENDATIONS OF THE STUDY.	40
Classification topics and subtopics	40
Classification organization.	40
File organization	45
File cabinet organization	45
Current File	47
Inactive file	48
Non-current file	49
Permanent file.	50
Retention-Transfer-Destruction program	52
To retain and eliminate materials	52
Cross index	53
Cross index organization	53
BIBLIOGRAPHY	55
APPENDIX	57

CHAPTER I

INTRODUCTION

Today, with the ever-increasing burden and important demands placed upon our existing educational facilities, it is paramount that office administration and organization be utilized to promote the greatest of efficiency in handling educational business matters. An investigation of filing methods in elementary schools of the Wenatchee Valley Area will be made and recommendations supplied for the development of a standardized filing procedure.

I. PURPOSE OF THE STUDY

Statement of the purpose. In establishing a standard procedure of filing materials that are relative to day-by-day operation of school office management, it becomes necessary to indicate the purposes for which the paper is planned. The purpose of the study is to secure information through a systematic study of the managerial operation of the elementary school files, with aims to produce: (1) utmost efficiency and expediency in the use of filing and finding of materials, and incorporated into: (2) a recommended system of filing organization and procedure.

II. METHOD OF RESEARCH

Procedure of the investigation. The investigation procedure will incorporate a personal interview with a questionnaire study. The procedure of research will be developed by two parts: (1) a pilot study, in which a preliminary investigation developing the permanent questionnaire is made; (2) the final investigation, utilizing the permanent questionnaire to obtain the desired results of the purpose of the study.

The pilot study. A pilot study of two schools will be made, on an experimentation and exploratory basis, to bring unforeseen problems into consideration which might relate to the study. Information received from the pilot study will be utilized in the organization of a more permanent and reliable questionnaire measuring instrument.

Design of the questionnaire. A tentative questionnaire will be designed to tabulate the results of a personal interview with the officials of the elementary school that is under study. It will attempt to seek out information that will be of most common concern to all elementary schools, and then used to organize the permanent questionnaire.

The content of the permanent questionnaire will reveal information, when continuing the study with other elementary schools, that may be used for establishing recommendations for the assimilation of the material into specific categories pertinent to developing a standard method of filing.

III. LIMITATIONS OF THE STUDY

Limitations of school participation. The extent of the investigation has been limited to include: (1) the elementary level of filing management; (2) the basis for the selection of the participating schools.

In the former, secondary levels were omitted because (1) the content of the filing material would be quite similar to the elementary level, but more voluminous; (2) the results of the study could be made applicable to that level with little alteration.

In the latter, to recognize and to alleviate the possibility of inconsistent and incoherent methods of filing within a school, by assuming (1) that stable communities are more conducive to established educational business methods as separated from rapidly growing communities; (2) the methods and procedures are of a more reliable nature to formulate an assimilation for the development of a standard method or procedure.

IV. DEFINITIONS OF TERMS USED

Pilot study. The pilot study is referred to as the procedure of preliminary investigation producing the results necessary in the organization and construction of the finished questionnaire.

Questionnaire method. A method whereby select material pertaining to the fulfillment of the purposes of the study are so stated and presented as to develop a report as to what conditions actually exist, as a manner of investigation.

Interview method. A method whereby permission is obtained and an appointment is made to discuss, with the managing official, the nature of this study and its relation to the existing office procedures of the particular school. Assistance will be given to enlighten misunderstood conceptions relating to the questionnaire.

Assimilation of material. The combining of general classification of material received from the schools visited, with purpose to recombine the material into a recommended standard procedure that may be used by an elementary school in the organization of its office file.

Standard filing procedure. The classification of all business matters into general classifications, with purpose to file consistently

and coherently in many school systems in like manner and procedure.

V. ORGANIZATION OF THE PAPER

An introduction to the program of the investigation is presented as to the manner in which the study will be conducted. The purposes upon which the study is developed are organized as two-fold: (1) to produce utmost efficiency and expediency in the use of filing materials; (2) a recommended system of filing organization and procedure.

The method of research establishes the procedure of the investigation with the desired goals to be accomplished. A pilot study, making a preliminary investigation of the study, utilizes the results obtained in organizing and formulating the method of inquiry of the questionnaire.

Limitations are considered in the over-all scope of the program. In developing a recommended procedure of filing, it is necessary to limit the plan to meet the immediate objectives.

Definition of terms employed in the study will render service in developing a common understanding of the study and of the results.

A review of the literature, past to present, will enlighten the writer as to the problems that may be confronted in the production of the study.

The design and the tabulation of the results of the questionnaire will provide the information necessary to develop a recommended standard procedure of filing educational office business material.

CHAPTER II

REVIEW OF THE LITERATURE

I. ANECDOTAL MATERIAL ON THE HISTORY AND PROBLEMS OF FILING SYSTEMS

Some 2,000 years before the birth of Christ, a business transaction took place at Tekk-Lop, a sun-baked town in southern Babylonia. After the required bargaining, Lugalkuzu agreed to deliver a large quantity of barley to Ur-Galalim. A solemn scribe, seated cross-legged nearby, took down details of the transaction, using a metal stylus to imprint them on the wet clay of a small tablet in cuneiform characters. The two-inch square tablet exists today, to attest to the sale and to indicate how reluctant business men are to destroy their records.

This squirrel-like propensity for saving things makes legal departments happy and drives office managers frantic. Accumulated records, say the lawyers, can turn the trick in lawsuits, claims and other actions. Acknowledging this, office managers point out that more papers mean more files, and more files mean more office space, and office space is increasingly expensive if not somewhat unobtainable.

There is no doubt that American business tends to bury itself under its own paper. The average company saves more than one thousand different types of records. To handle these, some eight million of our populations are employed as clerical workers.

What has created this phenomenon of mass accumulation? The answers include: (1) mechanical business aids, (2) legal requirements, (3) the efficient operation of the office, and (4) the individual's desire for self-protection.

Carbon paper, a 19th century invention, was probably the greatest single factor in creating extra copies of business documents. In 1873, the first practical typewriter was produced. Then came adding machines, bookkeeping machines and tabulating machines. Records of all kinds could be turned out speedily, often to be filed and forgotten.

Federal, state and local laws do require the retention of certain documents for specific periods of time. Under the Fair Labor Standards Act, time cards must be saved for two years. The Civil Aeronautics Board says flight movement records should be kept for a six-year period. Other bodies have similar rules. Business men, innatively conservative, usually exceed these legal requirements in saving records, just to make sure.

The fourth great impetus to record saving is what many executives call the "alibi copy." It comes into being when every individual involved in a transaction must have a set of the papers used, in his own personal file, to be beneficial in controversial events. This urge for self-protection keeps many a business man's file clerks harassed, as in the case of Henry Morgenthau Jr., Secretary of the Treasury under President Franklin D. Roosevelt, whose 864 numbered volumes, each containing about three hundred pages have been maneuvered into the custody of the National Archives.

These reasons may not apply to all cases of over-filing. But one fact is clear, unnecessary paper work is costing both valuable time and money. To lessen the problem, plans have been worked out by such office equipment manufacturers as Remington Rand, and by groups such as the National Management Records Council. Such plans are based on two main points: (1) a records retention and destruction program, (2) the efficient use of modern filing methods and equipment.

To establish a records retention and destruction program, a team of experts enter the business in question and inspect its operation throughout. Use of such a team may be impractical in individual elementary schools. However, results of such findings may be employed with great success. They recommend what

material to destroy, what to save and for how long, and how to handle upcoming materials in the future. Each case is treated individually, but experience has produced a number of general observations.

In the average organization, 35 per cent of the records being maintained can be immediately destroyed without impairing any operations. Of the remainder, 30 per cent can be transferred to less costly storage space. Of those records remaining, about 20 per cent have a value which will expire within a predictable period. Of all records, probably less than 15 per cent will have to be maintained permanently other than materials such as forms.¹

Once a retention and destruction program has been established, the second step is to install up-to-date methods and equipment based on which of the four major types of filing will best fit the job at hand. The four include: (1) alphabetic, probably the oldest, simplest, and most obvious form of filing; (2) numeric, for numbered cases, contracts, or jobs; (3) geographic, when territorial divisions are the most convenient record form, and (4) subject, which demands more judgment on the part of the file clerk than the others.

These are basic. Within them are modern variations by the score. For instance, an alphabetic system employs colors as

¹Aramco World, File or Forget (New York: Arabian American Oil Company, 1955), pp. 13-15.

well as captions to aid the file clerk in instant recognition. Very modern and still well known as a numeric system is the Dewey Decimal Classification used in libraries throughout the nation. Under this system, number groups are used to designate literature of different types; 000 for general works of reference, 100 for philosophy, 200 for religion, 300 for social sciences, and so on.

Typical of modern filing ingenuity is a system in which names that sound the same, but are spelled differently--Berk, Birke, Berc--are grouped together for easy reference by special coding. Such a method is installed in the U. S. Census Bureau and at the United States Immigration and Naturalization Service in New York where eighteen million names are indexed. Since there are literally hundreds of ways of spelling some common foreign names, this method is invaluable to immigration authorities.

The punched card filing system has been made evident to most by the Bureau of Internal Revenue's annual communications. But perhaps the most impressive punch card system in the world is the Federal Bureau of Investigation's fingerprint file. There, 125 million cards carry the prints of criminals, suspects, armed forces members, civilian government employees and others. Specialized cards carry the arrest records of more than nine million criminals. A simple mechanical operation can quickly produce the

cards on all criminals six feet tall, another operation yields all criminals six feet tall with blue eyes, and so on indefinitely.

An important filing system for huge masses of data is that using microfilm. Among the most important microfilm records ever made is the current project of photographing the contents of the Vatican Library in Rome. At the Vatican, under the auspices of the St. Louis University, more than ten million pages of rare, ancient manuscripts are being put on sixteen millimeter film for preservation and to permit easy access for scholars.

Libraries brought systematic cataloging, and thus filing, into existence. At Nineveh there was a library of 10,000 clay tablets. In Egypt, about 2,000 B. C., papyrus documents were rolled, then packed in clay jars which were labeled and arranged on library shelves. The great Greek library at Alexandria broke down its books into 120 classes. With the growth of Christianity, monasteries acquired their own libraries as repositories of learning. The churches, with their carefully preserved parish records have given us important dates, such as the birth dates of Shakespeare and Milton, and other historical information. And it was an organization called the Library Bureau, organized in Philadelphia in 1876, which produced the vertical card file, pioneering modern-day filing systems and equipment.

Up-to-date systems of handling records can save business millions of dollars each year. An efficient system of handling personal records probably will not save the elementary school much money, but what it does may certainly be utilized elsewhere. It will most certainly prevent much frustration and assist in the conservation of the time element on the part of the office manager.

II. ACCEPTED PRACTICES IN GOOD FILING PROCEDURES

Types of filing classification. Filing is defined as a systematic arrangement of records or materials whereby these may be stored for use at a future time. In this process, the files are so organized as to accommodate the placing and retraction of materials at the convenience of little effort and utmost efficiency.

Weeks compares the filing of materials as a standard process just as all businesses operate on the fundamental principles of debit and credit.² Notation is made that there are only four ways to classify material for filing: (1) by name, of the firm or individual; (2) by location, of the state, city or street; (3) by the subject, being the content of the paper; (4) by date, including the time of issuance or use.³ After classification of the material is made then one of the

²Bertha M. Weeks, How to File and Index (New York: The Ronald Press Company, 1951), p. 1

³Ibid., p. 5.

four basic processes or a combination of two or more are utilized. There are many methods of organization within the basic processes. To mention several, methods of filing by color and by size of print are known as subsidiary methods.

The four major types of basic filing processes most commonly used are: (1) the alphabetic process, in which all items to be alphabetized should be arranged in proper sequence of the alphabet; (2) the subject process, in which the main headings follow the major divisions of subject matter; (3) the geographic process, in which principal geographic localities are to be covered, and (4) the numeric process, of which an alphabetized, subject, or a geographic process of filing is given number values, and by cross-reference with the use of a key, the material is processed.

The alphabetic process. The alphabetic process or alphabetic name file comprises eighty-five per cent of all filing arrangements. In this basic process, sometimes known as the dictionary plan, all material is catalogued systematically in an alphabetic order. Two of the most common examples of this process are illustrated by the organization of a dictionary and a telephone directory.

Guides or dividers are used as mechanical means of separating materials. Each guide is lettered for a corresponding

letter of the alphabet which in total comprises twenty-six divisions. Subsidiary divisions are then made, of which there is no definite limit of divisions or guides that may be used. As an example, Weeks states, within the content of a two-thousand division file, there may be over two hundred guides for letter "S" alone.⁴

For practical purposes, a good alphabetic file requires a knowledge of names and the value of the letter filing headings. The letters, B, C, G, H, M, S, and W consist up to fifty-three per cent of the normal alphabetic file. Letter "X" is almost negligible, with the remaining eighteen letters comprising approximately forty-seven per cent of the space of the file. This information may be of practical concern when organizing a file in the alphabetic process.

The subject process. The subject process of filing is the arrangement of material by a subject or topical name. This involves choosing a word or phrase that will identify the material which is then filed. However, unlike the alphabet process, the subject process is confusing in that no two persons think alike about any one topic. Irregularities are brought forth in identifying one and

⁴Ibid., p. 8.

the same material by different users of the same file.

Subject files are most commonly used in the presentation of an over-all picture with the subject subdivided into lesser and immediate subtopics within topics as the material permits.

The standard types of subject files incorporate alphabetic and numeric systems. As no logical connection exists between subtopics filed next to each other in the alphabet-subject process, the subtopic arrangement is alphabetic as each subtopic is related to the main subject topic.

The two types of alphabet-subject filing processes include the dictionary method and the encyclopedic method. In the former, the dictionary method, an arrangement of many detailed subjects exists. Examples of this may be illustrated as:

Alphabetic systems	filed under "A"
Geographic systems	filed under "G"
Numeric systems	filed under "N"

In the latter, the encyclopedic method, few main headings exist with many subdivisions. An example to illustrate this point would be:

Systems, ---filing
 Alphabetic
 Geographic
 Numeric

The dictionary process, incorporating many small subjects, has been found to be the most satisfactory arrangement when there

exists inadequate or lack of trained office assistance. However, in order to be a good file, its arrangement must be simple, its divisions and subdivisions well defined and flexible in allowing for expansion. It should be inexpensive, with the possibility of producing expedient and efficient results.

The numeric process. The numeric subject process is an arrangement of topics assigned a number which are further subdivided as the topic grows. The Dewey Decimal System as used in libraries is an outstanding example of this form of a subject-numeric filing process.

The Dewey Decimal System, being a formal type of classification more so than a simple Roman Numeraled outline classification, considers a very wide range for expansion both in subject matter and in volume. As new subject matter may be inserted in proper alphabetic sequence in the alphabet-subject process indefinitely, each item of new material must be fitted into the proper place of printed classes and subdivisions in a decimal classification. The divisions in the decimal system follow each other in logical sequence bringing material on the same subject together. A full alphabetic index is a necessity for use of a decimal classification.

The geographic process. The geographic process is an arrangement of materials filed with the specific geographic location in mind. Business men commonly use this process as a means of keeping information regarding their business concerns if they are spread throughout the country or a special territory. It enables sales organizations to keep track of their various branches. It also facilitates mailing lists for business campaigns. Insurance laws and licensing vary considerably from one area to another and are also a major factor in organizing geographically, as many other factors affect this form of classification.

As the four types of geographic filing consider: (1) state, town, and name; (2) town, state, and name; (3) groups of states, town, and name; (4) salesman's name and territory, it is somewhat impractical to apply a geographic distribution classification in the elementary school outside of having information designating the stocking and storage of supplies throughout the building if adequate storage space is not provided to centralize all of the necessary equipment.

CHAPTER III

DESIGN OF THE QUESTIONNAIRE

I. QUESTIONNAIRE ORGANIZATION

Territory of development. The pilot study was developed and made under the surveillance of Paul Furgeson, Superintendent of Wenatchee Public Schools. Presentation of the organized pilot study was made by interview with W. Brown, Principal, Columbia Elementary School, and E. Watt, Principal, Lewis and Clark Elementary School, both, respectively, of the Wenatchee, Washington, City Public School System.

Basis for tentative questionnaire. The questionnaire used during the pilot study was designed to bring together the relationship of the size of the school with the type of filing classification procedure used. This was brought about through an investigation of information regarding: (1) the school plant and personnel, (2) correspondence and materials handled, (3) equipment and space utilized, and (4) filing practices encountered.

As the community locale of the school plant is important in that a stable condition must exist for reliable results the number of

teaching stations, pupils, and employees at the school were recorded. Information regarding those who have access to the files and their qualifications with experience background was noted. Recommendations and qualifications of personnel needs were requested with purpose to improve the elementary office staff and efficiency of operation.

The procedure of handling all educational business matters regarding correspondence and materials involved: (1) filing procedure and location, (2) factors constituting retention and destruction of materials, and (3) recommendations and suggestions regarding correspondence needs.

Space and equipment is a necessity in the management of the school plant. Office space in area and the number of rooms or divisions of the office with other storage spaces were recorded. Equipment in the form of files and other means of storage with the amount of space utilized and recommendations for additional as well as a minimum amount and type of equipment was made.

Analysis of the filing procedure and methods employed considered: (1) a personal file, and (2) office files. A basis for the development and operation of a personal file was achieved along with the desired location it maintained. The methods of handling business material in its filing and the type of classification employed was

recorded. Conclusions regarding the distribution of and the accessibility to the files with comments and recommendations for their function were also established.

II. PILOT STUDY QUESTIONNAIRE FORM

The pilot study form. The pilot study being a tentative preliminary investigation for the organization of the final questionnaire is organized into four component parts;¹ (1) the school plant, and the qualifications of personnel having access to the school files; (2) the handling of correspondence and materials with the development of a retention-transfer-destruction program and a personal file with added comments; (3) the equipment and its location used to house and store the material; (4) the various types of classification systems employed.

III. PILOT STUDY QUESTIONNAIRE CONCLUSIONS

Conclusions of tentative questionnaire. In developing the pilot study questionnaire it was necessary to consider the weaknesses and strength of the questionnaire. Among those weaknesses to guard against were those of achieving unreliable results,

¹Appendix referral to the four parts of the Pilot Study. pp. 58-61.

time-consuming interviews, and unrelated information not pertinent to the study. The strength and reliability of the questionnaire being antonymous of its weaknesses. The author found that a personal interview was very time-consuming and somewhat irrelevant in securing the desired information. As the study included the size of the school plant in relation to filing methods employed in office management, it was noted, that (1) the size of the school, (2) the number of pupils, (3) the number of teaching stations, (4) the number of other employees, (5) the qualifications of those having access to the files, and (6) the individual differences of plant management had no great influence on the results obtained other than the individual principal's method of office management.

It is concluded that information regarding the size of the plant in relation to the filing procedure employed is unnecessary as in the materials utilized in the operation of the school plants seem to be somewhat consistent in most situations with each filing process differing.²

IV. PERMANENT QUESTIONNAIRE DESIGN

Basis of permanent questionnaire design. Considering

²Appendix referral to material classification results of the Pilot Study. pp. 62-66.

results and the weakness of the tentative questionnaire it is desirous to design the permanent questionnaire to seek information regarding: (1) materials not presently included as classified in the pilot study, and (2) the method of subject matter classification. Development of a standard procedure of classification will then result by re-arrangement of materials found to exist in various school systems.

V. PERMANENT QUESTIONNAIRE PROCESS

Method of file investigation. The manner of obtaining material for the permanent questionnaire considered a sampling of elementary schools in and around Central Washington. Grateful appreciation for the cooperation received is due the following principals: Keith Haskins, Wenatchee; Claire Boys, East Wenatchee; Mayo Wristen, Winlock; John Brearley, Toppenish; Tom Mattoon, Skamokawa; Jack Burnell, Ellensburg; and Bill Shawver, Kennewick, Washington.

Form of the permanent questionnaire. The permanent questionnaire was organized into two parts and included: (1) the name of the managing official with the name and location of the participating elementary school, and (2) the classified material results of the Pilot Study.³

³Ibid.

The file content material classification information achieved by the pilot study was arranged in alphabetic order and presented to the above-named persons. Absent material in the Pilot Study and present in the above-mentioned files were inserted in proper place. Provision was made for deviations of the alphabetic process and were noted by the principal in the space provided in the questionnaire. Deviations were slight. However, many materials were filed under synonymous terms as the material content permitted. As an example, bulletins from the superintendent's office might be filed under Policies of the District Office, if they pertained to such policies. Discrepancies of this nature is of common occurrence.

CHAPTER IV

RESULTS OF QUESTIONNAIRE SURVEY

I. EXISTING METHODS EMPLOYED

Methods in use. The existing methods employed to file the materials are as wide in scope with as many variations as there are individuals to file them. Probably the most outstanding procedure employed is that procedure which satisfies the whim of the secretary or principal at the time the filing is being done. This insecure method promotes searching difficulties when materials are to be re-located. As the majority of the filing cabinets are open to access by other personnel as well as the office staff, due to part-time office assistance, it becomes very difficult to find materials, let alone to replace them properly in manner and order.

The filing program was generally organized in three phases. The first phase concerned all form type materials that were stored in closets, on shelves, in cabinets and cupboards, in an outer office and labeled, where all personnel had access to the forms when needed. The second phase included materials that secretarial help would encounter during each day's activity.

Teachers had access to this material in relation to such items as daily attendance, material catalogs, and school bulletins. The filing cabinets, filing boxes and desks were so arranged as to promote an ease of handling for the secretary. Generally, much of this material was so situated that information needed through a telephone call was easily available. The third phase included material relative only to the principal and the decisions he or she might make of them. It was usually filed in a four-drawer standard filing cabinet and located in the private office of the principal. The material in many instances was arranged in a seasonal manner and in that particular season, such as spring, supply ordering, all material would be removed from the filing cabinet about requisitions, orders, forms, requests, catalogs, and so forth, to the principal's desk where ease of handling would contribute to a more successful operation. Upon completion of the project, all materials were then re-stored in the filing cabinet.

A personal file was maintained at the principal's desk to accommodate the principal. The importance is in the convenience of having pertinent materials available.

II. MATERIALS CLASSIFIED

Handling of materials. The handling of materials was

dependent upon many factors. The space of the office probably affected this more than any other factor, other than the design and the construction of the building itself. School personnel operated on what was available in space and the program was as flexible as could be made for the existing situations.

A central office was desired and most commonly maintained. However, in many instances principals were compelled to place materials in a geographical classification manner throughout the building.

The classification, retention, and destruction of materials are dependent upon the nature of the material. All material was retained and classified alphabetically, and by subject matter if the material was deemed important and necessary to the operation of the school. New material was always on hand before old and outdated material was destroyed. The destruction of material was based on non-essential material, such as, when cases close out, and when guarantees expire or are not available.

The space utilized in storage of materials was dependent upon whether or not there was a material retention-destruction program. In most cases there were no real programs other than the decisions regarding the material made by the principal or the secretary.

III. MATERIALS USED

Manner and content. The materials filed and the manner in which this was done was dependent upon the principal and the secretary, a secretarial prerequisite being simply a matter of common agreement between the administrator and the assistant. In this manner many forms of filing procedure were employed. The most common procedure incorporated an alphabetic-subject-psychological manner of filing. In this process all material was classified by subject headings and arranged alphabetically with color sheets inserted to denote material of important nature.

The subject headings of material most commonly classified and available to all personnel are arranged alphabetically as follows:

(asterisk indicates material not present)

Administration	Audio-visual
Meetings	Equipment
District	Books and Magazines
Local	Subscriptions
Annual School Report	Budget
Attendance	Final
Blanks	Preliminary
Records	Catalogs
Special (Indian)	Supplies
Reports	Equipment
Arithmetic	Citizenship
Curriculum	Civil Defense
Brochures	Classification of Student
Guides	Collections
Art	Easter Seals
Curriculum	Heart Fund
Media	March of Dimes
	Miscellaneous
	Red Cross

- Communications
 - Doctor
 - Parent
- Community Resources
- Conservation
- Contests and Tournaments
- *County-City Adoptions
- County Supt. Bulletins
- Curriculum
 - Development and Study
 - Elem. Guide
- *Departmentalization
- Directories
- Drama & Plays
- Duplicator Material
 - Maintenance
 - Supplies
- Education in Washington
 - State Bulletins, Official
 - State Supt. Curriculum
 - State Supt. Letters
- Exchange Ideas
 - Visits
- Exceptional Children
 - Gifted
- Expenditures, Monthly
- *Festivals
 - Dads' Night
 - Field Days
 - Mothers' Tea
 - Fairs and Parades
- Fire Drills and Reports
- Forms
 - Accident
 - Student
 - Auditorium Use
 - Calendar and Skeleton
 - Check Lists
 - Classification Sheet
 - Enrollment Blanks
 - Equipment Checkout
 - Film Request
 - Grade Sheets
- Gymnasium Use
- Health
 - Cards
 - Certificates
 - Physical Examinations
- Inventory of
 - Building
 - Equipment
 - Textbooks
 - Supplies
 - Playground Equipment
- Insurance
 - Accident
 - Student
 - Blue Cross
 - Student Hazard Liability
- Library Books
- Rebound Books
- Maps, Globes, and Charts
- Lunch Reports
- Reading Lists
 - Intermediate
 - Primary
- Report Cards
 - Examples
- School Savings
- Substitute Teachers
 - Lists
 - Monthly Report
 - Voucher
- Supplies
- Tests
- Textbooks
- *Time Sheets
- Transfer Cards
- Withholding Statements
- Workbooks
- Free and Inexpensive Material
- Geography
 - Curriculum
- Graduation Exercises
 - Past
- Guarantees

- Handbooks
 - Pupils
 - Teacher
- Health
 - Curriculum
 - Mental, Physical
 - Special Notices
 - State Bulletin
 - Teeth & Nutrition
- History
 - Curriculum
- Instructional Aid
 - *Britannica Jr.
 - Compton's Encyclopedia
 - World Book Encyclopedia
 - County Library
 - Classroom Information
 - Washington State Museum
 - School Films
- Inventories
 - Furniture
 - Supplies
 - Building
 - Classroom
 - Office
 - Textbooks
 - Maps, Globes, and Charts
- *Journal, School
 - Keys
- *Kindergarten
 - Language Arts
 - Curriculum Guide
- Library
 - Rules
 - Services
 - Schedules
 - Standards
- Lunch Report
 - Daily Count
 - Bills
 - Menu
 - Receipts
 - Reports
 - Monthly
 - Weekly
- Statements
 - Special Milk
 - Transmittal Records
- Music
 - Curriculum
 - Special Music
- Maps and Globes
- NEA & WEA & LOCAL
- Pamphlets
 - Professional Literature
- Penmanship
- Permits
 - Field Trips
 - Permission
 - Passes
 - Work
- Physical Education
 - Course of Study
 - Equipment
- Pictures
 - Class
 - Library
- Public Relations
 - Community
- Pupils
 - Health Cards
 - Permanent Records
- Principal
 - Bulletins
 - Meetings
 - County
 - Local
- Projectors
 - Maintenance
- PTA
- Reading
 - Curriculum
 - Materials
 - Remedial
- Receipts
- Remedial Procedures
 - Speech
- Requisitions
 - Back Years
 - Fiscal Years

Room Mothers & Aids
Rules
 Games
 Playground
Salary Schedules
Safety Bulletins
Safety Patrol
Schedules
 Class
 Program
 Teacher
School Board
 Minutes
School Nurse
School Savings
Science
 Curriculum
Social Studies
 Course of Study
Softball
Speech Referrals
Student
 Government
 Funds

Reports
 Activities
 Committees
Resources
*Summer Program
Supt. Office Notices
Supervision
 Reports
Tape Recorder
 Maintenance
Teacher
 Records
 Retirement
 Social Security
Tests and Evaluations
Transfers
Typewriters
Units of Study
Wholesale Houses
Visual Education
 Bulletins
 Catalogs & Pamphlets
 Commercial

The principal's personal file is organized to promote expediency in the fulfillment of daily responsibilities. The materials most commonly classified are:

Auditorium Use

Forms

Budget

Calendars

School Events

Checklist Forms

Current File

Daily Work

Directories

City and County

Enrolment Lists

Fire Drills

Films

Health Problems

Insurance

Maps, City and County

Patrols, Safety

Personnel

Custodians

Janitors

Substitutes

Teachers

Receipts

Stationery

CHAPTER V

THE SUMMARY

It is necessary to review the existing conditions which relate directly to the formation and actual establishment of a filing system which will provide adequate information, materials, and supplies, for better teaching and better learning experiences when the occasion demands, with resultant goals of producing intelligent decisions and favorable public relations.

I. THE REVIEW

Review of the value of proper materials. The expansion of our society together with a growing population has placed serious problems for consideration in the day-by-day operation of the public school plant and program. In satisfying the social needs, great quantities of research materials are continually growing and are now available in all fields of educational research. A major problem exists in the applying, by delegated responsibility, the proper attention to recognized matters of importance. Having immediate available use and easily attainable professional material at hand, lessens the problem to degree of minor importance.

Cause and effect has provided a situation indicating increased office management should be of the quality to deal with a greater degree of efficiency and expediency. The results of increased performance most notably affects the principal or administrator by enabling him to gain the fulfillment of educational aims more completely and satisfactorily while simultaneously improving public relations between the factors of education and the members of the community.

II. FILING PHASES IN EXISTENCE

Recording phases in existence. While it may be shown that the existence of an instrument supplying needed materials has been functioning for quite some time, probably since the expansion of education problems became so acute and tremendous over the years that the individual mind could no longer be the storage closet for such matters, it is interesting to note the variations in methods employed to utilize all of these materials.

The National Association of Educational Secretaries¹ recently made a survey calling upon numerous public school secretaries over a wide geographical distribution area to list the major areas of

¹The National Association of Education Secretaries will be abbreviated hence as follows: N. A. E. S.

filing content as they affected the public school. The consensus of findings listed over three hundred major divisions in clerical as well as in educational matters pertaining to the use of materials for the function of the school. The N. A. E. S. concludes the systems of filing invariably are at the whim and disposal of the official or the secretary, in either of which cases confusion so often reigns unless preparation and training has been made to standardize and control the recording of materials by filing.

The various standard recording systems employed by schools of secretarial study are listed by the National Filing Aid Bureau² as using primarily alphabetical and numerical systems. The former is integrated in all and filed by four styles: (1) Name, (2) Subject, (3) Geographic distribution, (4) Psychological. The latter is a cross-reference method of filing all materials by number because of the extreme quantity of materials. The numerical system, however, employs an alphabetical card catalog utilized in the location of materials.

As these methods are employed purposely for the operation of business systems, no such method has been officially declared as a standard procedure in recording by file, whether it be of

²The National Filing Aid Bureau will be abbreviated hence as follows: N. F. A. B.

clerical or of professional material used in the administration of the public school. The N. F. A. B. suggests utilizing all or parts of all the methods to satisfy the problem in the immediate situation. With the aid of classification of educational matters by the N. A. E. S., an attempt to develop a filing system is being made.

CHAPTER VI

THE CONCLUSIONS

THE PURPOSE AND VALUE OF PROPER MATERIALS

While this report is primarily concerned with the development of one phase of office organization, the keeping of good records and the importance of a systematic filing procedure, it is also of major importance to consider and keep in mind the affect of securing proper materials when momentarily needed upon the office staff, whose function is to solve all problems that arise in the daily transaction of educational business affairs.

I. THE RESPONSIBILITY

Responsibility of the central office. The school office, being generally greatly understaffed, is, by necessity, the central nervous system and correlating distribution center of the school. It is responsible to bring together and to distribute the functions necessary to maintain the school plant and its educational program. The office accomplishes this by being in the position to directly bring together the people of the community and their children, into association with the daily administration routine of the system, and its

various teaching and managerial proceedings. To do this effectively and efficiently it is necessary for the school office to have at its disposal certain materials and equipment needed for the successful operation of this purpose. This equipment being an accurate and simple organization of a file system with information pertaining to all matters of the school, having the purpose to handle all of these matters expediently and accurately to the satisfaction of all concerned.

II. TRENDS

Present trend. The importance of having and being able to locate materials greatly affects the function of the school plant in all of its intricate phases. Recent trends to develop more effective and better management is rapidly increasing in our schools. To have materials and information at the fingertips would greatly promote more favorable experiences and better schools.

III. PRINCIPAL'S ROLE

The role of the principal. The role portrayed by the principal in the development of his office is of utmost importance. He, in effect, will be the person to receive the greatest satisfaction and enjoyment as an outgrowth of good information organization.

Absence and lack of sufficient and accurate information utilizes considerable time and energy in giving proper attention to various problems. With this situation cleared, the principal will have added time to devote to the supervision and administration of his duties.

IV. IN CONCLUSION

In fulfillment of educational aims. To secure the promotion of health, safety, and the growth of the child both physically and mentally, it is of prime importance to use the technical advancements given by research workers in their specific fields. Without the proper facilities to utilize this mass of increasing information, progress may actually be hampered, causing innumerable stalemates and unfavorable attitudes of our educational processes.

Of organization and obligations. As organization development is an outgrowth of an increasing and expanding society, fulfillment of increased obligations and responsibilities to meet this growth is also necessary. In a concluding sense, it is the conviction of the writer that adequate information facilities are a "must."

CHAPTER VII

RECOMMENDATIONS OF THE STUDY

A thoughtful organization of the filing program promotes the desirable art of good principalship. It develops orderly handling, ease of operation, and instills confidence and pride in the management of the profession.

The recommendations of this study will (1) classify under specific headings the topics and subtopics of the file contents; (2) recommend a file organization plan; (3) develop a retention-transfer-destruction program.

I. CLASSIFICATION TOPICS AND SUBTOPICS

Classification organization. The classification of elementary filing presented is of a subject-alphabetic arrangement. In this process, major divisions or word phrases have been developed to include the major topics or divisions of elementary school files. Allowance for expansion is provided as the files continue to grow. Only those subtopics have been inserted that are of primary importance to the filing classification that may satisfy the elementary filing procedure. The major classifications are produced in

following form.

RECOMMENDED SUBJECT CLASSIFICATION

ADMINISTRATION

Administrative Board	City Board of Education
Committees	Members
Meetings	
* Agenda	County Board of Education
Directives	Members
Minutes	
Members	*District or System Organization
Administrative Departments	*Elections
Curriculum	
Divisions	Reports
Staff	Annual School
Counselors	
Directors	State Department of Education
Faculty	Bulletins
Supervisors	Curriculum
Teachers	Letters
Substitute	
Student	*U. S. Office of Education
Permanent	
Administrative Staff	ASSOCIATIONS, ORGANIZATIONS, & SPECIAL SERVICES
Meetings	
Agenda	Business and Industrial
Directives	Charitable and Welfare
Minutes	Civic and Civil Defense
Members	Fairs and Festivals .
	*Labor
Bulletins	Parent-Teacher
* Directives	*Patriotic
Handbooks	Professional
Instructions	NEA, WEA, Local
Manuals	*Religious
Safety	Room Mothers & Aids

*Indication of National Association of Educational Secretaries recommendations.

*Social

*Youth

*BOOKS AND PUBLICATIONS

Articles

Bibliographies

Books

Library

Supplemental

Textbooks

Bulletins and Brochures

Clippings

Free and Inexpensive Material

Magazines

Subscriptions

Newspapers

Pamphlets

Professional Literature

Publishers

BUILDINGS AND GROUNDS:

*Blueprints and Plans

*Building Codes

Housing

Inspection

Keys and Locks

Lockers

Maintenance

Operation

Staff

Use of

Buildings

Auditorium

Gymnasium

Grounds

BULLETINS:

Safety

Student

Teacher

*BUSINESS AFFAIRS:

Activity Accounting

Student

Banking

School Savings

Pupil

Bills and Vouchers

Bookkeeping

Budget

Accounts

Fiscal

Previous

Appropriations

* Information

Building Programs

Additions

Alterations

New Buildings

Architects

Plans

Specifications

Cash Receipts

*Claims

Collections

Easter Seal

Heart Fund

March of Dimes

Miscellaneous

Red Cross

Equipment and Supplies

Custodial

Office

Room

Physical Education

Insurance

Accident

Athletic

* Automobile

Hospitalization

Liability

* Life

Medical

Insurance (Cont.)

Surgical
Theft

Inventories

Equipment

Payrolls

Purchasing and Requisitions

Catalogs

Requisitions

Wholesale Houses

Records and Reports

Attendance

Fire Drills

School Lunch Program

Bills and Statements

Daily count

Menu

Receipts

Reports

Monthly

Weekly

Special Milk

Transmittal Records

School Nurse

*Taxes

Amusement

Assessment

Levies

Information

Payroll Withholding

CALENDARS AND SCHEDULES:

Activity

Festivals

Dad's Night

Fairs & Parades

Mother's Tea

Journal, School

Class

Program

Yearly

Salary

Summer

Teacher

CURRICULUM AND INSTRUCTION

Audio-Visual

Bulletins

Catalogs & Pamphlets

Commercial

Equipment

Maintenance

Phonograph

Projector

Tape Recorder

Curriculum

Aids, Classroom

Encyclopedia

Britannica Jr.

Compton

World Book

Library

City & County

Rules

Services

Books

Films

Schedules

Standards

Music

Special

Development & Study

Elementary Guide

Exceptional Children

Gifted

Divisions

Art

Arithmetic

Athletics

English

Geography

Health

History

Music

Reading

Science

Social Studies

Spelling
 Penmanship
 Instruction
 Course of Study
 Materials
 Brochures & Guides
 Methods & Technics
 Remedial Procedures
 Rules & Regulations
 Tests & Measurements &
 Evaluation

Programs

Health
 Mental, Physical
 Special Notices
 State Bulletin
 Teeth & Nutrition

DIRECTORIES:

Building
 City
 County
 State

FORMS:

Accident
 Attendance
 Auditorium Use
 Calendar and Skeleton
 Check Lists
 Classification Sheet
 Enrollment
 Equipment Checkout
 Film Request
 Grade Sheets
 Gymnasium Use
 Health
 Cards
 Certificates
 Physical Examination

Inventory of
 Building
 Equipment
 Supplies
 Textbooks
 Insurance
 Accident
 Student
 Blue Cross
 Student Hazard Liability
 Library Books
 Maps, Globes, and Charts
 Lunch Reports
 Reading Lists
 Intermediate
 Primary
 Report Cards
 Examples
 School Savings Envelope
 Substitute Teachers
 Monthly Reports
 Vouchers
 Supplies
 Tests
 Time Sheets
 Transfer Cards
 Withholding Statements
 Workbooks

*PERSONNEL:

Absences
 Accidents
 Activities
 Appointments and Assignments
 Handbooks
 Medical Records
 Pension and Retirement
 *Placement Agencies
 Policies and Procedures
 Recommendations
 Salary Schedules
 Services and Welfare

Social Security	Enrolment
Student Assistants	Field Trips
Student Teachers	Graduation Exercises
Directors	Previous
Substitute Teachers	Government
List	Reports
	Activities
	Committees
PUBLIC RELATIONS:	Patrol
	Resources
Publicity, Community	Handbooks
Newspapers	Health Cards
Radio	Resident
Television	Non-resident
	Personal
STUDENTS OR PUPILS:	Behavior
	Correspondence
Accidents	Doctor
Activities	Parents
Contests	Placement
Tournaments	Recommendations
Census	Regulations
Citizenship	Schedules
Classification	Scholastic Progress
Cumulative and Permanent	Transfers and Withdrawals
Records	Transportation
Employment	

II. FILE ORGANIZATION

File cabinet organization. The elementary file cabinet is organized and divided into four parts: (1) a current file, in which all material used during the school year is stored; (2) an inactive file, in which material having minor value is retained; (3) a non-current file, in which material has definite value and is retained for a longer period of time; (4) a permanent file of material that is of irreplaceable value to be retained indefinitely.

The current file is the file that all business matters of the present year are stored in. A coding system is organized to receipt the material for the length of retention desired. In this file, material is retained for the duration of one year. A cross file index may be organized to facilitate the rapid location of materials needed.

The inactive file is organized in the same manner as the current file with exception of the type of materials retained, destroyed, and the length of the retention.

The non-current file like the previous files has a similar arrangement. The duration of the retention of materials is much longer and possibly much more important.

The permanent file unlike the previous files has a wide variation of materials to be permanently retained. These materials generally are public property and if not filed with the school board or with the superintendent's office, which in many instances is a common occurrence, then space should be properly provided. The filing arrangement is similar to the current, inactive, and non-current procedure.

Following is a listing of materials and procedure of the filing cabinet organization.

III. CURRENT FILE

Code 1

Material is current and is retained for at least one year.

Correspondence:

Filed in folders behind subject to which it pertains.
Subject index card indicates correspondence is present.

Dealing with:

- Program of classes
- Room schedules
- Instructional materials
- Notes on matters handled orally
- Subject matter (education)
- Projects occurring annually
 - To be later moved to inactive file
- Plans for meetings and programs
- Policies (Insurance, etc.)
- Policy

Student Programs

Records

Accident, Damage, and Injuries

Orders for Materials

- Acknowledgment
- Shipping Notices
- Receipts of Equipment

IV. INACTIVE FILE

Code 2

Material is retained for a period of two to three years.

Correspondence:

Filed in folders behind subject classification.
Subject index card recoded and indicates correspondence
is present.

Dealing with:

Subject matter on 2-3 year retention for recall.
Long range student programs.
Surveys
Research
Policies
Policy

Student Programs:

Curriculum

Records:

Accident
Damage
Injuries
Settlement is claimed or is pending

Budget Estimates

Purchase Orders:

Code "D"

Program of Studies and Plans

Code "D"

V. NON-CURRENT FILE

Code 3

Material is retained four, five, six, and through the seventh year.

Correspondence:

Pertaining to and including

- Subject matter of permanent nature
- Policies
- Policy
- Leases and agreements
- Child accounting records
- Deposit books and stubs
- Paycheck records
- Miscellaneous check records
- Receipts
- Bank Statements

Uncollectible Accounts:

Code "D"

- Records
- Reports
- Correspondence

Elections:

- Board Members
- Bond Issues
- Petitions

VI. PERMANENT FILE

Code "P"

Permanent Records:

Material is never to be destroyed.
May be transferred to central district office for micro-film
process of retention.

Correspondence:

Pertaining to and including:

Subject Matter and programs
District policies

Records:

Accident, Damage, Injuries, Settlements
When used legally

Orders for Materials:

Receipt of equipment for inventories

Student Records:

Courses completed and general personnel information

Professional Staff Records:

Self-evaluation records never filed

Non-teaching Employee Records

Administration Board Records

Correspondence, minutes, and policy

Abstracts, Deeds, Title Papers, Mortgages, Gifts and Bequests

Most commonly transferred to district office

Bond Ledgers, Records, and Registers

Perpetual Inventory regulated

Perpetual Register regulated

Levies:

Copies of schedules, Returns, Records of Appeal

Budgets:

Officially adopted

Audit Reports

Bookkeeping Ledgers:

Receipts, Disbursements, Journals

Payrolls

Other evidence of payment for service

Annexation:

Boundaries

Buildings

General information

Building Program Records:

Blueprints

Contracts

Needs

Projected enrolment

Specification

Reports:

Pension

Retirement

Administration Officers

To County, State, and Government Agencies

VII. RETENTION-TRANSFER-DESTRUCTION PROGRAM

To retain and eliminate materials. To prevent the files from being used as storage areas simply to hold materials that are no longer used, it is necessary to develop a retention-transfer-destruction program. A coding system developed in five parts with a numerical-alphabetic significance will do the job well. Code symbols of the numbers and letters 1, 2, 3, P, and D may be used in any subsidiary manner. Material may be coded upon placement into the current file, transfer into the inactive and non-current files, and will eventually find its way to a permanent resting place in the permanent file or be destroyed. The procedure of the five codes are as follows:

- Code 1: Materials are dated upon receipt and retained for one year.
- Code 2: Materials are dated upon receipt and retained for a duration of two to three years.
- Code 3: Materials are dated upon receipt and retained for a duration of four to seven years.
- Code P: Materials are dated upon receipt and retained indefinitely.
- Code D: Materials are destroyed upon transfer. The cross index card is filed in the inactive card index division to indicate material had been present.

The organization of the file retention-transfer-destruction program operates simultaneously with filing organization. Allowance for expansion and classification of the files is within the realm of decision made by the office manager. As all situations have not been presented, an attempt to accommodate has been provided.

VIII. CROSS INDEX

Cross index organization. A cross index serves a purpose of material location if the files are voluminous at all. Although, a cross index may be a time-consuming mechanical aid it nevertheless has tremendous value when pressing moments deem immediate attention. The operation and maintenance of the index is somewhat a simple process. The development of the cross index file is a miniature copy of the recommended elementary filing process inclusive throughout with descriptive cards of the material. Index cards are made on all material filed previous to the time the material is inserted into the files. Material may be coded, dated, and classified as a receipt of attention. This would be a valuable assistance of which secretaries or clerks would greatly appreciate during the yearly filing cleaning process.

Organization of a sample index card may include:

SUBJECT:	DATE:	CODE
<u>Name or Firm</u>		1 2
<u>Address</u>		3 P
		D

SEE: (Cross reference)

GENERAL INFORMATION AND DESCRIPTION

Transfer to:

2 3 P D

Signature for disposal

BIBLIOGRAPHY

BIBLIOGRAPHY

A. BOOKS

- Bassett, E. D., and Peter L. Agnew. Business Filing. Cincinnati: South-Western Publishing Company, 1955. 170 pp.
- Chamberlin, Coleman R. Filing Facts. New York: National Filing Aid Bureau, 1953. 67 pp.
- Opdycke, John B. Get It Right! New York and London: Funk & Wagnalls Company, 1953. 673 pp.
- Weeks, Bertha M. How To File and Index. New York: The Ronald Press Company, 1951. 306 pp.

B. PUBLICATIONS OF ORGANIZATIONS

- Arabian American Oil Company. Aramco World. New York: Arabian American Oil Company, 1955.
- National Association of Educational Secretaries. File It Right. Washington, D. C.: National Education Association, 1953.

C. NEWSPAPERS

- Spokesman (Washington) Review, January, 1956-June, 1956.
- Pegler, Westbrook. "The Records of Morgenthau," Spokesman Review, May 10, 1956, p. 4.
- Pegler, Westbrook. "All Morgenthau Data Not Open," Spokesman Review, May 12, 1956, p. 4.

APPENDIX

PART 1

PILOT STUDY

DATE

SCHOOL:

LOCATION:

TEACHING STATIONS:

PUPILS:

EMPLOYEES

M. F.

(No.) Custodians

Secretaries

Other

ACCESS TO FILES: (No.)

Secretaries

Teachers

Pupils

QUALIFICATIONS OF PERSONNEL HAVING ACCESS TO FILES:

Education and Background

Years of:

Elem.

Second.

Jr. Coll.

College

Bus. Trng.

Secretary

Exper.

Teacher

Exper.

Pupil's

Exper.

Other

Exper.

PERSONNEL NEEDS: (Purposes and Comments)

PART 2: PILOT STUDY

CORRESPONDENCE:

Procedure of handling:

FILED:

	Envelopes	Folders	Other	Carbon	Location
Incoming					
Outgoing					

RETENTION:

	1 Year	2 Years	3 Years	Permanent	Destroyed
Incoming					
Outgoing					

WHAT FACTORS CONSTITUTE DESTRUCTION OF CORRESPONDENCE?

PERSONAL FILE:

Arrangement	Location	Topical Classification

CORRESPONDENCE NEEDS: (Comments and Purposes)

82523

PART 3

PILOT STUDY

EQUIPMENT

Office Space

Area

Rooms

Other Storage Space

FILES IN USE:

Description

	UPRIGHT CABINET	FLAT CABINET	OTHER
Quantity	_____ 2 drawer	_____ 2 drawer	Description
	_____ 3 drawer	_____ 3 drawer	
	_____ 4 drawer	_____ 4 drawer	
	_____ 5 drawer	_____ 5 drawer	
	_____ 6 drawer	_____ 6 drawer	
	_____	_____	

OTHER EQUIPMENT USED FOR FILING:

Quantity	Desks	Closets	Book Cases	Filing Boxes
----------	-------	---------	------------	--------------

File Space in use: Full 3/4 2/3 1/2 1/4 Empty (Circle)

FILE NEEDS: (Comments and Purposes)

PART 4: PILOT STUDY**FILE CLASSIFICATION:**

(Arrange all materials in alphabetic order)

Filing System

Alphabetic Subject Numeric Psychological Geographical

PERMANENT QUESTIONNAIRE

FILING CONTENT AND PROCEDURES

PART 1:

Date

School: _____

Location: _____

Principal: _____

COMMENTS OF ORGANIZATION:

PART 2: PERMANENT QUESTIONNAIRE
 FILING CONTENT AND PROCEDURES

* Indicate classifications not present

ALPHABETIC CLASSIFICATION

Annual School Report	Community Resources
Attendance	Conservation
Blanks	Contests and Tournaments
Records	County-City Adoptions
Reports	Curriculum Development and Study
Arithmetic	Curriculum Elem. Guide
Brochures	Departmentalization
Guides	Directories
Art	Drama
Audio-visual	Duplicator Material
Books and Magazines	Education in Washington
Budget	State Bulletins, Official
Final	State Supt. Curriculum
Preliminary	State Supt. Letters
Citizenship	Exchange Ideas--visits
Civil Defense	Exceptional Children
Classification of Student	

Expenditures, Monthly	School Savings
Festivals	Substitute Teachers
Fire Drills and Reports	Supplies
Forms	Tests
Accident	Textbooks
Auditorium Use	Time Sheets
Calendar and Skeleton	Transfer Cards
Check Lists	Withholding Blanks
Classification Sheet	Workbooks
Equipment Checkout	Free and Inexpensive Material
Film Request	Geography
Grade Sheets	Guarantees
Health Cards	Handbooks, Teachers
Health Certificates	Health
Inventory of Equipment	Curriculum
Inventory of Textbooks	Mental, Physical
Insurance	Special Notices
Library Books	State Bulletin
Maps, Globes, and Charts	Teeth & Nutrition
Lunch Reports	History
Reading Lists	Instructional Aid
Report Cards	Britannica Jr.

County Library	Statements
Classroom Information	Special Milk
Wash. State Museum	Transmittal Records
School Films	Music Curriculum
Inventories	Special Music
Furniture	Maps and Globes
Supplies	NEA & WEA & Local
Textbooks	Penmanship
Journal, School	Permits
Keys	Field Trips
Kindergarten	Permission
Language Arts	Work
Library	Physical Education
Rules	Pictures, School
Services	Plays
Schedules	Public Relations
Standards	Pupils
Lunch Report	Handbook
Bills	Permanent Records
Menus	Health Records
Receipts	Principal
Monthly	Bulletins
Weekly	Meetings

Projectors	Social Studies
PTA	Softball
Reading	Speech Referrals
Curriculum	Student Resources
Materials	Summer Programs
Remedial	Supt. Office Notices
Receipts	Supervision
Remedial Procedures	Tape Recorder
Requisitions	Teacher Records
Back Years	Teacher Retirement
Fiscal	Tests and Evaluation
Salary Schedule	Transfers
Safety Bulletins	Typewriters
Safety Patrol	Units of Study
School Nurse	Wholesale Houses
School Savings	Visual Education
Science	Bulletins
Seatwork	Commercial
Spelling	

SUBJECT CLASSIFICATION

Comments on Classification