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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. Wolfse	ehr	

Dedicated

to

My Wife

Gladys Willene

Whose understanding and patience

Has contributed to a great heritage

ACKNOWLEDGMENT

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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, <u>File or Forget</u> (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 modernday 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. 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. After classification of the material is made then one of the

 $^{^2}$ Bertha M. Weeks, How to File and Index (New York: The Ronald Press Company, $\overline{1951}$), 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 subjectnumeric 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 question-naire 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 rearrangement 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)

Meetings
District
Local
Annual School Report
Attendance
Blanks
Records
Special (Indian)

Administration

Reports
Arithmetic
Curriculum
Brochures
Guides
Art

Curriculum Media Audio-visual Equipment

Books and Magazines Subscriptions

Budget Final

Preliminary

Catalogs
Supplies
Equipment
Citizenship
Civil Defense

Classification of Student

Collections
Easter Seals
Heart Fund
March of Dimes
Miscellaneous
Red Cross

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

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

Committees

Meetings

* Agenda

Directives

Minutes

Members

Administrative Departments

Curriculum

Divisions

Staff

Counselors

Directors

Faculty

Supervisors

Teachers

Substitute

Student

Permanent

Administrative Staff

Meetings

Agenda

Directives

Minutes

Members

Bulletins

* Directives

Handbooks

Instructions

Manuals

Safety

City Board of Education

Members

County Board of Education

Members

*District or System Organization

*Elections

Reports

Annual School

State Department of Education

Bulletins

Curriculum

Letters

*U. S. Office of Education

ASSOCIATIONS, ORGANIZATIONS,

& SPECIAL SERVICES

Business and Industrial

Charitable and Welfare

Civic and Civil Defense

Fairs and Festivals

*Labor

Parent-Teacher

*Patriotic

Professional

NEA, WEA, Local

*Religious

Room Mothers & Aids

^{*}Indication of National Association of Educational Secretaries recommendations.

*Social	*DOSIMESS AFFAIRS:
*Youth	
	Activity Accounting
*BOOKS AND PUBLICATIONS	Student
	Banking
Articles	School Savings
Bibliographies	Pupil
Books	Bills and Vouchers
Library	Bookkeeping
Supplemental	Budget
Textbooks	Accounts
Bulletins and Brochures	Fiscal
Clippings	Previous
Free and Inexpensive Material	Appropriations
Magazines	* Information
Subscriptions	Building Programs
Newspapers	Additions
Pamphlets	Alterations
Professional Literature	New Buildings
Publishers	Architects
	Plans
BUILDINGS AND GROUNDS:	Specifications
	Cash Receipts
*Blueprints and Plans	*Claims
*Building Codes	Collections
Housing	Easter Seal
Inspection	Heart Fund
Keys and Locks	March of Dimes
Lockers	Miscellaneous
Maintenance	Red Cross
Operation	Equipment and Supplies
Staff	Custodial
Use of	Office
Buildings	Room
Auditorium	Physical Education
Gymnasium	Insurance
Grounds	Accident
	Athletic
BULLETINS:	* Automobile
	Hospitalization
Safety	Liability
Student	* Life
Teacher	Medical

Insurance (Cont.)	CURRICULUM AND INSTRUC
Surgical	TION
Theft	
Inventories	Audio-Visual
Equipment	Bulletins
Payrolls	Catalogs & Pamphlets
Purchasing and Requisitions	Commercial
Catalogs	Equipment
Requisitions	Maintenance
Wholesale Houses	Phonograph
Records and Reports	Projector
Attendance	Tape Recorder
Fire Drills	F
School Lunch Program	Curriculum
Bills and Statements	Aids, Classroom
Daily count	Encyclopedia
Menu	Britannica Jr.
Receipts	Compton
Reports	World Book
Monthly	Library
Weekly	City & County
Special Milk	Rules
Transmittal Records	Services
School Nurse	Books
Taxes	Films
Amusement	Schedules
Assessment	Standards
Levies	Music
Information	
Payroll Withholding	Special
1 ayron withholding	Development & Study
CALENDARS AND SCHEDULES:	Elementary Guide
CALLINDAILD AND BUILD OLLED.	Exceptional Children
Activity	Gifted
Festivals	Divisions
Dad's Night	Art Arithmetic
Fairs & Parades	
Mother's Tea	Athletics
Journal, School	English
Class	Geography
	Health
Program	History
Yearly	Music
Salary	Reading
Summer	Science
Teacher	Social Studies

Inventory of Spelling Building Penmanship Equipment Instruction Supplies Course of Study Textbooks Materials Brochures & Guides Insurance Methods & Technics Accident Student Remedial Procedures Blue Cross Rules & Regulations Tests & Measurements & Student Hazard Liability Evaluation Library Books Maps, Globes, and Charts Lunch Reports Programs Reading Lists Health Mental, Physical Intermediate Special Notices Primary Report Cards State Bulletin Teeth & Nutrition Examples School Savings Envelope Substitute Teachers DIRECTORIES: Monthly Reports Vouchers Building Supplies City County Tests Time Sheets State Transfer Cards Withholding Statements FORMS: Workbooks Accident Attendance *PERSONNEL: Auditorium Use Calendar and Skeleton Absences Check Lists Accidents Classification Sheet Activities Appointments and Assignments Enrollment Equipment Checkout Handbooks Medical Records Film Request Grade Sheets Pension and Retirement *Placement Agencies Gymnasium Use Policies and Procedures Health Cards Recommendations Certificates Salary Schedules Services and Welfare Physical Examination

Social Security
Student Assistants
Student Teachers
Directors
Substitute Teachers
List

PUBLIC RELATIONS:

Publicity, Community Newspapers Radio Television

STUDENTS OR PUPILS:

Accidents
Activities
Contests
Tournaments
Census
Citizenship
Classification
Cumulative and Permanent
Records
Employment

Enrolment
Field Trips
Graduation Exercises
Previous
Government

Reports
Activities
Committees

Patrol Resources Handbooks Health Cards Resident

Non-resident Personal Behavior

Correspondence

Doctor Parents Placement

Recommendations

Regulations Schedules

Scholastic Progress

Transfers and Withdrawals

Transportation

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.

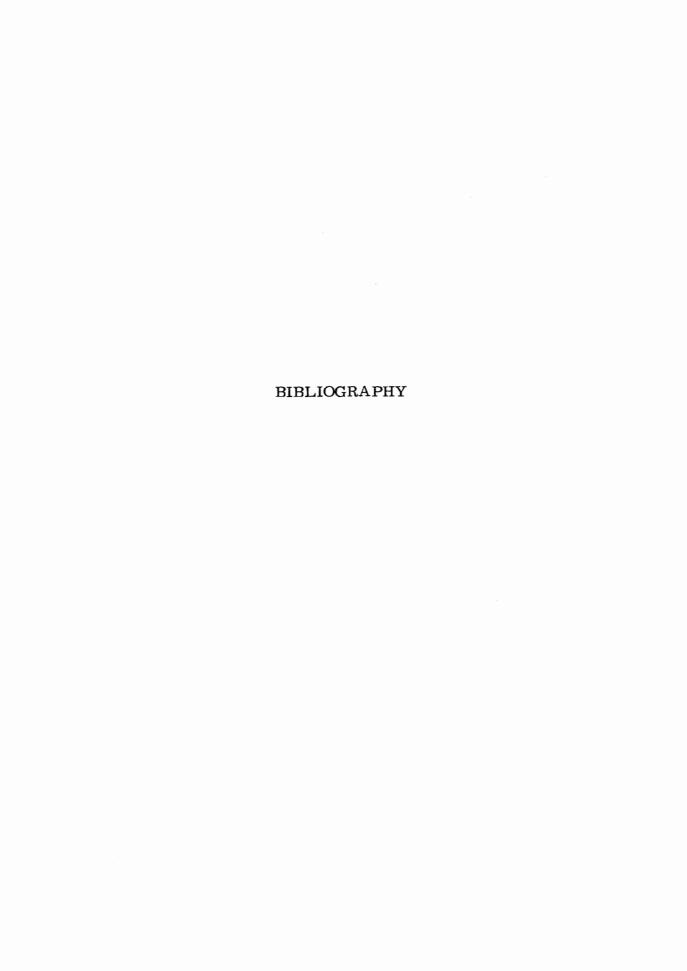
The organization of the file retention-transfer-destruction program operates simultaneously with filing organization. Allowance for expansion and classification of the files is within the realm of decision made by the office manager. As all situations have not been presented, an attempt to accommodate 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 neverthe-less 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:	DAIE:	CU	שעי
Name or Firm		1	2
Address		3	\mathbf{P}
		D	
SEE: (Cross reference)			
GENERAL INFORMATION AN	D DESCRIPTION		
Transfer to:			
2 3 P D			
	gnature for disposal		



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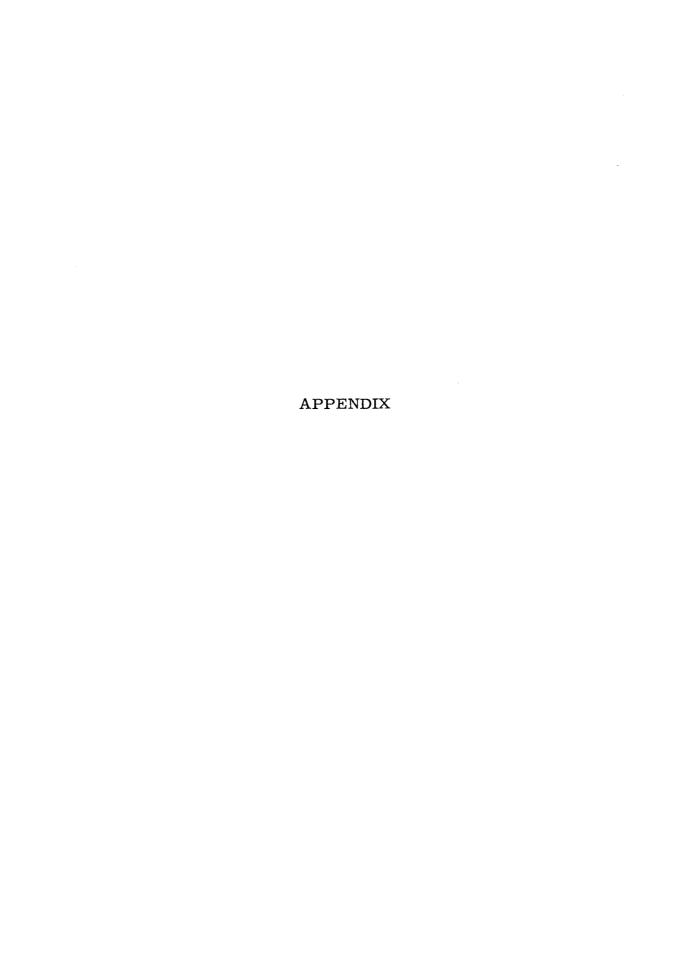
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PART 1

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)

PART 3		PILOT	r STUDY			
EQUIPMENT						
Office Space			Area			Rooms
Other Storag	e Space					
FILES IN US						
UF	RIGHT C	ABINET	FLAT	CABIN	ET	OTHER
Quantity	2 dra 3 dra 4 dra 5 dra 6 dra	wer wer wer		2 dra 3 dra 4 drav 5 drav 6 drav	wer wer	Description
OTHER EQU	IPMENT	USED FOR	FILING:			
Quantity	Desks	Closets	Book (Cases	Filing	g Boxes
File Space in	use: Fu	11 3/4 2	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