

DOCUMENT RESUME

ED 227 344

CE 035 444

**TITLE** Competency-Based Cooperative Office Education. Vocational Education Curriculum Guide. Revision. Bulletin 1246.

**INSTITUTION** Louisiana State Dept. of Education, Baton Rouge. Div. of Vocational Education.

**PUB DATE** [82]

**NOTE** 45lp.

**PUB TYPE** Guides - Classroom Use - Guides (For Teachers) (052)

**EDRS PRICE** MF01/PC19 Plus Postage.

**DESCRIPTORS** Advisory Committees; Communication Skills; \*Competency Based Education; \*Cooperative Education; Cooperative Programs; Educational Equipment; Human Relations; Instructional Materials; Job Search Methods; Legal Responsibility; Minimum Competencies; Office Machines; \*Office Occupations Education; Office Practice; \*Program Development; Program Evaluation; \*Program Implementation; Public Relations; Recordkeeping; Secondary Education; Shorthand; State Curriculum Guides; Student Evaluation; Student Placement; Telephone Usage Instruction; Typewriting; Word Processing

**IDENTIFIERS** Business Mathematics; \*Louisiana

**ABSTRACT**

This curriculum guide, dealing with competency-based cooperative office education in the State of Louisiana, consists of 10 chapters on program implementation and 12 instructional units. Covered in the first part of the guide are cooperative office education programs; coordination, program management, and student placement; legal responsibilities; advisory committees; public relations; classroom necessities; reports; student organizations; supplemental materials; and the evaluation process. Topics addressed in the instructional units include telephone techniques; word processing; human relations; securing and keeping job communication skills; financial records; business math and machines; typing; shorthand; office procedures; and specialized offices, such as banking, insurance, legal, and medical offices. (MN)

\*\*\*\*\*  
 \* Reproductions supplied by EDRS are the best that can be made \*  
 \* from the original document. \*  
 \*\*\*\*\*

STATE OF LOUISIANA  
DEPARTMENT OF EDUCATION

REVISION  
BULLETIN 1246

COMPETENCY-BASED  
COOPERATIVE OFFICE EDUCATION

VOCATIONAL EDUCATION CURRICULUM GUIDE

Issued by

Office of Vocational Education

N. J. Stafford, Jr.  
Assistant Superintendent

J. Kelly Nix  
State Superintendent

U.S. DEPARTMENT OF EDUCATION  
NATIONAL INSTITUTE OF EDUCATION  
EDUCATIONAL RESOURCES INFORMATION  
CENTER (ERIC)

This document has been reproduced as  
received from the person or organization  
originating it.  
Minor changes have been made to improve  
reproduction quality.

- Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS  
MATERIAL HAS BEEN GRANTED BY

*J. E. Hart*

TO THE EDUCATIONAL RESOURCES  
INFORMATION CENTER (ERIC)."

ED227344

CE035444

## EQUAL OPPORTUNITY STATEMENT

In compliance with Title VI, Title IX and Section 504 of the Rehabilitation Act of 1973 this Educational Agency upholds the following policy:

This is an Equal Opportunity Institution and is dedicated to a policy of non-discrimination in employment or training. Qualified students, applicants or employees will not be excluded from any course or activity because of age, race, creed, color, sex, religion, national origin, or qualified handicap. All students have equal rights to counseling and training.

This document was printed at \$ 11.16 per copy by the Department of Education for the purpose of disseminating information pertaining to Vocational Education under authority of P.L. 94-482 as amended and the regulations issued thereunder. This material was printed in accordance with the standards for printing by state agencies established pursuant to R.S. 43:31.

## FOREWORD

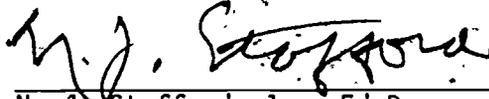
This curriculum guideline, Cooperative Office Education, was produced as a result of a project funded by the Louisiana State Department of Education to Nicholls State University of Louisiana. These units were developed with the assistance of Business Education teachers and coordinators throughout the state of Louisiana.

The instructional units of work included in this curriculum guide have been written to aid teachers in meeting the increasing and the changing needs of the students and of the job market. This guide lists specific objectives in terms of competencies that, when achieved, will enable the student to obtain employment.

  
J. KELLY NIX, STATE SUPERINTENDENT

## ACKNOWLEDGEMENTS

This publication represents the cooperative efforts of personnel at Nicholls State University and the Business Education Section in the Office of Vocational Education, Louisiana State Department of Education. Special recognition goes to Dr. E. Elaine Webb who served as project director and Dr. Sallye Benoit who served as workshop instructor in the development of the guide. Special commendation goes also to members of the writing team who worked diligently to make this publication a reality.



---

N. J. Stafford, Jr., Ed.D.  
Assistant Superintendent  
Office of Vocational Education

MEMBERS OF COMPETENCY-BASED BUSINESS EDUCATION CURRICULUM WRITING TEAM

Dr. E. Elaine Webb, Project Director  
Department of Administrative Services and Vocational  
Business Education  
Nicholls State University of Louisiana  
Thibodaux, Louisiana 70310  
(504) 446-8111

Dr. Sallye Benoit, Project Instructor  
Administrative Services and Vocational Business  
Education  
Nicholls State University of Louisiana  
Thibodaux, Louisiana 70310  
(504) 446-8111

Local Business Teachers

Beleta Bischoff  
McKinley Senior High  
800 E. McKinley  
Baton Rouge, LA 70802

Nelson B. Cortez  
Morgan City High  
P. O. Box 2628  
Morgan City, LA 70380

Raymond Dillon  
St. James High  
P. O. Box 101  
St. James, LA 70086

Walter Michael Flowers  
Nicholls State University  
P. O. Box 2057 NSU  
Thibodaux, LA 70310

Glenda Gaudet  
West St. John High  
P. O. Box 66  
Edgard, LA 70049

Janet Giroir  
Assumption High  
P. O. Box 383  
Napoleonville, LA 70390

Antonia P. Hebert  
Central Lafourche High  
P. O. Box 89  
Mathews, LA 70375

Mildred Ann Henry  
Baker High  
3200 Groom Road  
Baker, LA 70714

Lynette N. Hernandez  
Patterson High  
P. O. Box 398  
Patterson, LA 70392

Doris J. Jacobs  
St. James High  
P. O. Box 101  
St. James, LA 70086

Précious A. Joseph  
East St. John High  
Rt. 1, Box 602  
Reserve, LA 70084

Sandra E. King  
Istrouma Sr. High  
3730 Winbourne Ave.  
Baton Rouge, LA 70805

Becky M. LaGrange  
Central Catholic High  
2100 Cedar Street  
Morgan City, LA 70380

Mary A. Martien  
Patterson High  
P. O. Box 398  
Patterson, LA 70392

JoAnn M. McDonald  
St. James High  
P. O. Box 101  
St. James, LA 70086

Alvin J. Navarre, Jr.  
South Lafourche High  
P. O. Box 158  
Galliano, LA 70354

Ruth Ann Pierce  
Central Lafourche High  
P. O. Box 89  
Mathews, LA 70375

Inez S. Shaw  
Tara High  
9002 Whitehall  
Baton Rouge, LA 70806

Jeannine S. Smith  
Central High  
10200 E. Brookside  
Baton Rouge, LA 70805

Myra M. Starr  
H. L. Bourgeois High  
Rt. 1, Box 242  
Gray, LA 70359

Clara R. St. Pierre  
Destrehan High  
P. O. Drawer A  
Destrehan, LA 70047

Mary B. Terry  
Assumption High  
P. O. Box 383  
Napoleonville, LA 70390

Rosalie I. Tull  
Belaire High  
12121 Tams Drive  
Baton Rouge, LA 70815

Workshop Typist - Leah Marie Mabile

## TABLE OF CONTENTS

	<u>Page</u>
INTRODUCTION TO GUIDE	i
THE COE PROGRAM	A-i
Cooperative Office Education	A-1
Benefit of the Program	A-2
Teacher-Coordinator	A-5
COORDINATION TASK	B-i
Program Management	B-1
Calendar of Coordination Activities	B-5
Initiation of New Program	B-12
Enrollment	B-22
Placement	B-40
Stages in Placement	B-40
Trainee Information	B-40
Training Stations	B-42
Student Responsibilities	B-58
Evaluation Process	J-i
LEGAL RESPONSIBILITIES	C-i
Legal Guidelines	C-1
ADVISORY COMMITTEE	D-i
The Advisory Committee	D-1
PUBLIC RELATIONS	E-i
Public Relations Activities	E-1
Program Promotion	E-5
Employer Appreciation Activity	E-10
CLASSROOM NECESSITIES	F-i
Facilities, Equipment, and Supplies	F-1
REPORTS	G-i
Program Reports	G-1
STUDENT ORGANIZATIONS	H-i
Future Business Leaders of America	H-1
COE Club	H-2
SUPPLEMENTARY	I-i
Glossary	I-1
Minimum Standards	I-5
State Department of Education Personnel	I-10
State Directory of Coordinators	I-11

	<u>Page</u>
THE EVALUATION PROCESS	J-i
Evaluation of the Student	J-1
Evaluation of the Training Station	J-1
Evaluation of the COE Program	J-2

### INSTRUCTIONAL UNITS

ORIENTATION, UNIT I	I-1
TELEPHONE TECHNIQUES, UNIT II	II-1
WORD PROCESSING, UNIT III	III-1
HUMAN RELATIONS, UNIT IV	IV-1
SECURING AND KEEPING A JOB, UNIT V	V-1
COMMUNICATION SKILLS, UNIT VI	VI-1
FINANCIAL RECORDS, UNIT VII	VII-1
BUSINESS MATH/MACHINES, UNIT VIII	VIII-1
TYPING REVIEW, UNIT IX	IX-1
SHORTHAND REVIEW, UNIT X	X-1
OFFICE PROCEDURES REVIEW, UNIT XI	XI-1
SPECIALIZED OFFICE PROBLEMS, UNIT XII	XII-1
Banking	XII-1
Insurance Office	XII-11
Legal Office	XII-23
Medical Office	XII-35

## THE COE PROGRAM

	<u>Page</u>
COOPERATIVE OFFICE EDUCATION	A-1
General Objectives	A-1
Specific Objectives	A-1
BENEFITS OF THE PROGRAM	A-2
Benefits to Students	A-2
Benefits to the School	A-2
Benefits to the Employers	A-3
Benefits to the Community	A-4
THE TEACHER-COORDINATOR	A-5
Roles	A-5
Certification	A-5
Professional Organizations	A-5

## COOPERATIVE OFFICE EDUCATION

Cooperative Office Education (COE) is a cooperative work and training program for high school seniors who have completed the necessary pre-requisites and are preparing for employment in office occupations. Through the cooperative efforts of the teacher-coordinator and the employer, the student receives academic and vocational instruction and practical, on-the-job training related to his/her individual job needs and career goals. Therefore, employment becomes an integral part of the educational program.

### General Objectives

1. Enrich the instructional program to include current business practices and procedures and up-to-date technology.
2. Provide exploratory opportunities by offering career choices for students with varying interests and aptitudes.
3. Provide the student an opportunity to apply the skills and theories acquired in school and to bridge the gap from school to full-time employment.

### Specific Objectives

1. Coordinate classroom instructional experience with practical work experience.
2. Provide an opportunity for the student to work with successful businessmen and women.
3. Develop and improve skills and techniques required by the local job market.
4. Stress the development of those personal traits, such as dependability, tact, poise, punctuality, etc., which are vital factors in job success and advancement.
5. Graduate a student who has had successful work experience that will contribute to his/her advancement in the business world.
6. Promote a closer relationship between the school and the business community through a joint effort to prepare students for entry-level jobs upon graduation from high school.

## BENEFITS OF THE PROGRAM

The basic purpose of the Cooperative Office Education program is to prepare students for gainful employment in careers of their choice. COE can make a substantial contribution toward solving employment problems for students. The program allows students to make a gradual transition from school to work while under the professional guidance of experienced teacher-coordinators and on-the-job supervisors.

### Benefits to Students

The students have an opportunity to:

1. develop a sense of responsibility and dependability.
2. acquire an understanding of the employment opportunities available to them and the responsibilities required by these opportunities through on-the-job training.
3. develop the attitudes, skills, and related knowledge necessary for success in his/her career objective.
4. develop those work habits which are necessary for job success.
5. acquire practical experience which can lead to full-time employment upon graduation.
6. value the importance of getting along with others in the work environment.
7. make practical application of those skills and abilities acquired in the classroom.
8. gain the work experience, which will enhance his/her chances for success and advancement when seeking full-time employment.
9. begin career training before assuming total personal financial responsibility.

### Benefits to the School

The school benefits because Cooperative Office Education:

1. uses the facilities and technology of cooperating businesses to broaden the vocational curriculum.
2. provides a means of evaluating the effectiveness of the business education curriculum.

3. enables the school to update course content and methods and to keep abreast of current office procedures and technology.
4. utilizes the facilities and equipment of cooperating employers as a laboratory for practical training thus reducing expenditures for equipment.
5. develops a working relationship between the school and the community.
6. meets the vocational needs of students with varying abilities and capacities.
7. provides effective career training not found within the limits of a classroom setting.
8. provides up-to-date information.

#### Benefits to the Employers

Employers benefit as Cooperative Office Education:

1. decreases training costs for entry-level positions, as the student with work experience can make an easier transition from the classroom to full-time employment.
2. provides motivated part-time workers who are receptive to instruction.
3. provides a better part-time student applicant and encourages him/her to continue working for the employer from whom he/she received training.
4. provides a steady source of experienced workers for full-time employment in entry-level positions, thus reducing employment problems.
5. assists in the instruction and guidance of the student during his/her initial job experience.
6. screens the prospective student worker prior to employment.
7. improves communication between educators and employers.
8. enhances the firm's public image in the local community.
9. provides an opportunity for the employer to participate in planning and executing the training program for the student worker.

## Benefits to the Community

The community benefits as Cooperative Office Education:

1. reduces the number of unemployed and unemployable youth in the local community and provides a continuous source of trained entry-level office workers.
2. encourages a greater number of young people to remain in school until they become employable, thus decreasing the dropout rate.
3. provides opportunities for the community and school to work together in the educational process.

## THE TEACHER-COORDINATOR

The teacher-coordinator of the Cooperative Office Education program is the key to the success of the program. His/her primary goal is the preparation of students to enter and advance in their careers. The teacher-coordinator's involvement with students, parents, other school personnel, and employers will cast him/her in a variety of roles.

**The Teaching Role.** As a teacher, the teacher-coordinator directs the learning program that will allow the student to develop the skills, attitudes, and related learnings necessary for success in the business world.

**The Coordination Role.** As the coordinator of the program, he/she must secure training stations, place students, evaluate student progress, integrate classroom theory with practical application, and serve as advisor to the student organization.

**The Counseling Role.** As counselor, the teacher-coordinator must provide career guidance for the student trainees.

**The Public Relations Role.** The teacher-coordinator must promote good public relations in the classroom, in the school environment, and in the business community.

**The Administrative Role.** The teacher-coordinator will be involved to varying degrees with planning, budgeting, reporting, evaluating and supervising functions.

### Certification

The teacher-coordinator of the Cooperative Office Education program must meet the requirements as outlined in Bulletin 746, Louisiana Standards for State Certification of School Personnel. In addition, he/she must comply with the "Minimum Standards for State Approval in Reimbursed Programs of Vocational Education."

### Professional Organizations

Professional organizations allow members to share their knowledge and achieve personal and professional growth. As a professional educator, the teacher-coordinator should be active in the general education organizations as well as the vocational organizations. The teacher-coordinator in Louisiana is urged to join and participate in the following vocational organizations:

American Vocational Association (AVA). At the national level the American Vocational Association is an organization promoting all areas of vocational education. The affiliate for the business education division is Classroom Educators for Business and Office Education (CEBOE).

2020 North 14th Street  
Arlington, VA 22201

Louisiana Vocational Association (LVA). The Louisiana Vocational Association is the state affiliate of AVA.

5845 South Pollard Parkway  
Baton Rouge, LA 70808

National Business Education Association (NBEA). Membership in NBEA includes membership in the regional association, Southern Business Education Association (SBEA).

1914 Association Drive  
Reston, VA 22091

Louisiana Association of Business Educators (LABE). The Louisiana Association of Business Educators is the business education section of LVA.

c/o Business Education Section  
State Department of Education  
Post Office Box 44064  
Baton Rouge, LA 70804

## COORDINATION TASKS

	<u>Page</u>
PROGRAM MANAGEMENT	B-1
Recruiting Students	B-1
Selecting Students	B-2
Placing Students	B-2
Recruiting and Selecting Training Stations	B-2
Developing Training Agreements	B-2
Developing Training Plans	B-3
Coordinating Visits	B-3
Evaluating On-The-Job Training	B-3
Evaluating Student's Classroom Activities	B-3
Public Relations	B-4
Records Management	B-4
CALENDAR OF COORDINATION ACTIVITIES	B-5
August	B-5
September	B-6
October - November - December	B-6
January	B-7
February - March - April	B-8
Late April - May	B-9
June	B-9
Ongoing Activities	B-10

B-i

	<u>Page</u>
INITIATION OF NEW PROGRAM	B-12
Determine Need and Feasibility	B-12
Outline a Tentative Program	B-12
Present Program Proposal to Administrators	B-13
Begin Program Operations	B-13
Appendices	B-14
ENROLLMENT	B-22
The Recruitment Process	B-22
The Application Process	B-23
The Selection Process	B-24
Appendices	B-26
PLACEMENT	B-40
STAGES IN PLACEMENT	B-40
TRAINEE INFORMATION	B-40
Identification Card	B-40
Student Agreement	B-40
Appendix L	B-41
TRAINING STATIONS	B-42
Training Station Resource File	B-42
Employer Contact	B-43
Criteria for Selection of Training Stations	B-43
Suggested Guidelines for Visitation	B-43
Training Agreement	B-45
Student Interviews	B-45
Introduction Cards	B-45
Trainee Orientation to the Job	B-45

B-ii

	<u>Page</u>
Training Plan	B-46
Related Instruction	B-46
Appendices	B-48
STUDENT RESPONSIBILITIES	B-58
Job Information Form	B-58
Weekly Training Station Reports	B-58
Statement of Earnings Report	B-58
Student Evaluation Form	B-58
Appendices	B-59
THE EVALUATION PROCESS, Section J	

## PROGRAM MANAGEMENT

Coordination is an on-going process engaged in by the teacher-coordinator and includes the following activities:

- Recruiting students
- Selecting students
- Placing students
- Recruiting training stations
- Selecting training stations
- Developing training agreements
- Developing training plans
- Coordination visits
- Evaluating on-the-job training
- Evaluating students' classroom activities
- Public relations
- Records management

A brief checklist for each activity follows with more complete lists in succeeding sections.

### Recruiting Students

1. Ask counselors to publicize program among the junior students during registration for senior year.
2. Ask other business education, math, and English teachers to talk with their vocationally-inclined students about the COE program.
3. Display posters.
4. Have interested students pick up and complete application forms.

### Selecting Students

1. Review applications including age, attendance record, disciplinary record, career intent.
2. Review applicants with appropriate school personnel.
3. Interview prospective COE students.
4. Select the students based on the above findings.

### Placing Students

1. Assess skills and abilities of individual applicants.
2. Contact local businesses for available jobs.
3. Determine skills and abilities needed on job and number of students to be interviewed.
4. Schedule job interviews.
5. Follow up on job interviews.

### Recruiting and Selecting Training Stations

1. Contact employers who have previously participated in program.
2. Contact prospective new employers.
3. Solicit help from members of advisory committee in recruiting training stations.
4. Interview appropriate personnel at each training station to determine duties involved, hours per day and per week, and length of employment period.
5. Be sure prospective employers understand child labor laws and the rules and regulations governing the COE program.

### Developing Training Agreements

1. Review training agreements with students, parents, administrators and employers.
2. Have training agreement signed by student, parent, employer, administrator, and teacher-coordinator.

### Developing Training Plans

1. Review training plan with employer and ask him/her to list all the tasks for which the student will be trained.
2. Have training plan signed by student, parent, employer, and teacher-coordinator and furnish each party with a copy.
3. Periodically review the training plan during evaluation of student's progress.

### Coordinating Visits

Visits should promote effectiveness and enhance efficiency. You should:

1. make an appointment for the visit at a time convenient to training supervisor.
2. be sure the purpose is clearly stated.
3. not interrupt the student-trainee's work unless the supervisor asks that the student participate in the interview.
4. record a summary of each visit.
5. be sure confidentiality of information is maintained.
6. conduct a follow-up interview with the student-trainee to advise him/her of strengths and/or weaknesses.

### Evaluating On-The-Job Training

1. Review points on evaluation form with employer.
2. Set deadline for completion of form.
3. Arrange for form to be returned to teacher-coordinator.
4. Review completed form with student pointing out strengths and weaknesses and making suggestions for improvement.

### Evaluating Student's Classroom Activities

1. Write evaluation of student's performance on classroom assignments.
2. Evaluate student's skill performance on appropriate office machines.
3. Evaluate student's attendance, punctuality and other pertinent characteristics.

## Public Relations

1. Publicize the program in school.
2. Publicize the program in the business community through the news media.
3. Make presentations to professional and civic groups when appropriate.
4. Prepare bulletin on program for distribution to students, parents, and employers.
5. Make presentation about program to parent-backer organization.
6. Publish and distribute COE newsletter.
7. Encourage your advisory committee to promote COE program whenever and wherever possible.

## Records Management

In order to have available all of the information to be reported for this federally funded program, it will be necessary to maintain accurate student records. It is recommended that a folder be maintained for each student to include the following documentation:

1. Classroom performance records
2. Application and interview notes
3. Record of interviews
4. Training agreement
5. Training plan
6. Employer evaluation forms
7. Weekly earnings report
8. Attendance and work reports

## CALENDAR OF COORDINATION ACTIVITIES

### August

1. Record telephone calls, activities, coordination calls, and mileage to be used in required reports and other records.
2. Contact students currently enrolled in COE program to determine availability for work and review career interest.
3. Contact other interested students to fill any vacancies left by students not returning to school and/or the COE program.
4. Create coordination file folders for students.
5. Review cumulative records of students to determine that all graduation requirements will have been met by the end of the school year.
6. Contact counselor to change student schedule to fit work schedule.
7. Schedule orientation with both students and parents.
8. Follow up on last year's COE students to determine current employment status.
9. Recruit new training stations and inform employers of COE rules and regulations.
10. Seek the aid of the advisory committee members and civic and professional organizations in locating new training stations.
11. Arrange interviews for students as jobs become available.
12. Attend meetings of state vocational education association and local coordinators' meetings.
13. Prepare article on COE for first edition of school newspaper and for "back-to-school" issue of local newspaper.
14. Organize advisory committee for coming year.
15. Review child labor laws and any others affecting the COE program.
16. Prepare a tentative schedule of activities for youth club; publicize planned activities.
17. Confirm contacts with newspaper, radio, and television personnel.

## September

1. Continue placement of students and adjust to fit work schedules.
2. Plan and present an orientation program for new students and for those students who did not attend the summer orientation session.
3. Review training agreements with students, parents, and employers and obtain signatures.
4. Visit training stations and develop a training plan for each student. Obtain appropriate signatures.
5. Build public relations activities around school events.
6. Call meeting of advisory committee. Prepare the agenda and minutes of the meeting.
7. Call meeting of youth organization. Elect officers and assist in planning activities for the year. Encourage students to begin preparation for district and state contests.
8. Make sure school calendar includes dates for the group's functions.
9. Prepare and file enrollment report with State Department of Education.
10. Plan and conduct fund-raising project(s).
11. Keep a daily log of coordination activities, training station visits, telephone calls, and mileage.

## October - November - December

1. Continue visiting training stations and developing a training plan for each student.
2. Periodically evaluate each training station.
3. Evaluate student's progress on the job by conferring with employer. Determine student's grade for first grading period.
4. At the all-school open house, conduct a program for parents of COE students.
5. Attend business education department meetings and solicit help from other business education teachers in developing a strong COE program.

6. Continue to maintain daily log of coordination activities.
7. Plan and conduct media programs promoting benefits of COE program.
8. Prepare displays promoting COE program.
9. Conduct individual conferences with students regarding their performance on the job, any problems encountered, classroom performance, and to offer suggestions and encouragement.
10. Maintain a "needs list" for supplies and equipment.
11. Have an open house for students, parents, and employers during school time to show off classroom. This can be done effectively prior to a school holiday, such as Thanksgiving, Christmas, etc.
12. Follow recommendations presented in first advisory committee meeting.
13. Plan additional meetings of advisory committee as needed.
14. Provide guidance and supervision during youth club meetings. Audit money and requisitions. Continue to encourage students to prepare for district and state contests.
15. Attend professional meetings--LABE, etc.
16. Invite local, state, and federal officials to observe the program.

#### January

1. Evaluate student's progress on the job by conferring with employer. Determine student's grade for second grading period.
2. Seek help of counselor in making second semester schedule adjustments.
3. Help students who are applying for scholarships and grants.
4. Conduct a follow-up study of previous graduates.
5. Update promotional brochures and course descriptions.
6. Begin preparation for employer appreciation function.
7. Interview students individually concerning grades and on-the-job progress.

8. Order examination copies of current teaching materials.
9. Plan activities for National Vocational Education Week.
10. Plan activities for FBLA/PBL Week.
11. Continue to maintain daily log of coordination activities.

February - March - April

1. Recruit students for next year's COE program.
  - a. Have present COE students talk to business education classes and relate successful COE experiences to prospective COE students.
  - b. Remind counselors to encourage vocationally-inclined students to apply for COE program.
  - c. Put up posters and bulletin board displays in school.
  - d. Distribute application blanks and other information to prospective students.
  - e. Ask faculty to recommend prospective students.
  - f. Collect needed information about prospective students.
  - g. Interview and counsel prospective students.
  - h. Choose students for next year's program.
  - i. Notify students regarding acceptance in COE for coming year. Assist them with registration.
  - j. Notify parents of new COE students and furnish them with information about the program.
2. Continue visiting training stations. Review with supervisor the training plan for each student. Determine student's progress on the job and determine student's grade for third grading period.
3. Select students who are to receive awards.
4. Plan activities for National Secretaries Week (April); be sure to include school secretaries.
5. Implement recommendations of advisory committee and call meetings as needed.
6. Carry out activities planned for FBLA/PBL Week.
7. Attend FBLA/PBL District and State Leadership Conferences.
8. Order textbooks, workbooks, practice sets, and other supplies for coming school year.

9. If funds are available, request new equipment for classroom instruction.
10. Continue to maintain daily log of coordination activities.

#### Late April - May

1. Conduct employer appreciation function.
2. Complete final on-the-job evaluation for each student. Determine student's grade for final grade reporting period.
3. Assist graduating COE students with college or employment planning.
4. Complete and submit vocational education reports as required by the State Department of Education.
5. Have an end-of-year meeting of the advisory committee to assess effectiveness of recommendations and to evaluate activities.
6. Prepare for National FBLA/PBL Leadership Conference.
7. Complete final audit of club funds and submit to proper authority.
8. Present awards to selected COE students at the school's Honors Day program.
9. Continue to keep daily log of coordination activities.

#### June

1. Send a thank-you letter to each employer expressing appreciation for participation in the COE program.
2. Update files for ending school term.
3. Conduct a summer orientation for new COE students to apprise them of rules and regulations governing COE program at local, parish, and state levels and to prepare them for job interviews.
4. Conduct an orientation activity for parents of new COE students.
5. Confirm existing training stations.
6. Enlist new training stations.

7. Begin placement of students for coming school year.
8. Organize file folders for new students.
9. Prepare training agreement for new students.
10. Attend professional meetings.

#### Ongoing Activities

1. Keep informed of new office practices, procedures and other developments by reading professional magazines and other literature.
2. Update supplementary materials in classroom.
3. Enlist the aid of the school librarian in acquiring reference books and supplementary materials.
4. Prepare articles for professional publications.
5. Assist in preparation of local COE newsletter.
6. Provide occupational information to counselors and administrators.
7. Participate in curriculum revision as the opportunity arises.
8. Update teaching methods and procedures.
9. Revise instructional units as needed to keep abreast of new procedures and technology.
10. Keep classroom bulletin boards up-to-date.
11. Observe programs at other schools when possible.
12. Be actively involved in local, state, and national professional organizations.
13. Participate in in-service activities for professional growth and development.
14. Make presentations to professional and civic organizations when requested.
15. Serve students by example in character, dress, work habits, and ethics.
16. Establish and maintain open lines of communication with other teachers, administrators, and staff personnel at local and state level.

17. Keep school administration informed of outstanding accomplishments by COE students in the classroom and on the job.
18. Participate in exchange visits for teachers, business and industry.

## INITIATION OF NEW PROGRAM

A new COE program should be initiated only after extensive planning has begun at least a year in advance. Steps in beginning a new program include the following:

1. Determine need and feasibility
2. Outline a tentative program
3. Present program proposal to administrators
4. Begin program operations

### Determine Need and Feasibility

The idea for a COE program may be initiated by an interested business, teacher, vocational supervisor, school administrator, and/or business person. Activities to ascertain the feasibility of a program could include the following:

1. Get permission from school officials to investigate prospective program.
2. Obtain information about operation of a COE program from State Department of Education and other teacher-coordinators.
3. Consult key individuals among employers, employees, schools, service organizations, and other agencies for regarding desirability for program.
4. Utilize a temporary advisory committee to assist in contacts and surveys.
5. Survey students to determine needs, interests, and availability for employment. (Appendix A)
6. Conduct an occupational survey to determine the number and types of available training stations. Assistance for such a survey can be obtained from a temporary advisory committee, Chamber of Commerce, service clubs, labor groups, counselors, and State Department of Labor. (Appendix B)
7. Evaluate data from the following additional sources:
  - a. Parent interest survey
  - b. School board recommendations
  - c. Faculty recommendations
  - d. Guidance counselor recommendations

### Outline a Tentative Program

Once the need and feasibility for a COE program has been proven, a written outline for its implementation must be devised. Such an outline should include: philosophy, objectives, program management, personnel, responsibilities, advisory committee functions, classroom accommodations, and estimated costs.

### Present Program Proposal to Administrators

A written program proposal should be submitted to the following levels of administration: high school principal, parish vocational supervisor, and the State Department of Education. The staff of the Business Education Section, State Department of Education, is available to assist the parishes or local schools in establishing new programs and to work with local administrators or coordinators.

### Begin Program Operations

Program operations must be headed by a qualified teacher-coordinator. Essential personal characteristics and state requirements (previously cited in the COE program) are to be considered in the selection of the teacher-coordinator.

Putting the COE program into operation is then the teacher-coordinator's responsibility. The teacher-coordinator's duties at this point are basically the same as those of a coordinator in an established program with the exception of public relations. A new program will require more publicity to both prospective students and employers as it is being established.

APPENDICES A AND B

APPENDIX A -- STUDENT INTEREST SURVEY

APPENDIX B -- OFFICE OCCUPATIONS SURVEY

APPENDIX A  
STUDENT INTEREST SURVEY

1. Name \_\_\_\_\_
2. Sex ( ) Male ( ) Female
3. Year in School ( ) Freshman ( ) Sophomore ( ) Junior
4. How would you describe your present health? ( ) Excellent  
( ) Good ( ) Average ( ) Poor
5. Do you have any physical disabilities? ( ) Yes ( ) No  
If yes, please describe. (It is essential to know whether you are confined to a wheelchair, hard of hearing, partially blind, etc., so that we can develop optimum programs and facilities to serve you.)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Father \_\_\_\_\_  
Occupation \_\_\_\_\_  
Where is he employed? \_\_\_\_\_  
(Name of Employer)  
\_\_\_\_\_  
(Address)

7. Mother \_\_\_\_\_  
Occupation \_\_\_\_\_  
Where is she employed? \_\_\_\_\_  
(Name of Employer)  
\_\_\_\_\_  
(Address)

8. Parents' educational background: Check one of the following for each parent.

Mother	Father	
( )	( )	Not a high school graduate
( )	( )	Graduated from high school
( )	( )	Business school or trade school
( )	( )	Some college
( )	( )	Graduated from college
( )	( )	Do not know how much education

9. Number of children in the family at home \_\_\_\_\_
10. Which high school course, program, or curriculum best describes the one in which you are enrolled?
- 1. Business
  - 2. College preparatory
  - 3. Shop or industrial arts
  - 4. Agriculture
  - 5. General
  - 6. Home Economics
  - 7. Fine Arts
  - 8. Other: (Specify) \_\_\_\_\_
11. To the best of your knowledge, what is your average grade in all of your high school courses?
- 1. A
  - 2. B
  - 3. C
  - 4. D
  - 5. Failing
12. What do you plan to do on a full-time basis during the first year after you complete high school? (check all that apply)
- 1. Work full time
  - 2. Get married
  - 3. Enter military service
  - 4. Work at home for parents
  - 5. Attend college or university
  - 6. Enroll in some type of educational training such as business college, trade school, technical school, or a nurses' training school (school name \_\_\_\_\_)
  - 7. Attend college full time and work part time
  - 8. Work full time and attend college part time
  - 9. Other (specify) \_\_\_\_\_
13. How do you think your parents feel about whether you attend college after high school graduation?
- 1. Insist or expect me to go
  - 2. Want me to go if I want to
  - 3. Do not care one way or the other
  - 4. Do not want me to go or will not allow me to go
14. If your future plans "do not" or "probably do not" include going to college, indicate the reasons.
- 1. Tired of studying
  - 2. Want to get a job
  - 3. Costs too much money
  - 4. What I want to learn is not at college
  - 5. Feel that I do not have the ability
  - 6. Other (specify) \_\_\_\_\_



21. After you finish high school, do you

- 1. Prefer to remain in the (insert local town name) area if you can find a job?
  - 2. Want to move to (insert name of a city) area?
  - 3. Don't know--it depends on (give reason) \_\_\_\_\_
- 

22. The men and women of this nation are employed in thousands of different occupations. It will never be possible for (insert name of school) to offer programs in all of these different occupations. It is, however, possible for several new career programs to be offered.

You can help in the planning of future programs by identifying the types of jobs in which you would be interested for your career.

APPENDIX B

PARISH

OFFICE OCCUPATIONS SURVEY

Your firm's name will not be used in connection with your answers. The information furnished by you and other businesses will be used for statistical purposes only. However, if there are any questions which you do not wish to answer, please omit them.

Name of Business \_\_\_\_\_ Type of Business \_\_\_\_\_

Address of Business \_\_\_\_\_

Name of Owner or Manager \_\_\_\_\_

Number of full-time office employees: Male \_\_\_\_\_ Female \_\_\_\_\_

Number of part-time office employees: Adult Male \_\_\_\_\_ Female \_\_\_\_\_  
High School Male \_\_\_\_\_ Female \_\_\_\_\_

Beginning salary of office employees hired \_\_\_\_\_  
Average or range

Name or types of employment tests administered \_\_\_\_\_

Minimum number of years of new full-time office employees \_\_\_\_\_

Minimum proficiency level required for new full-time office employees:

Typewriting \_\_\_\_\_ Shorthand \_\_\_\_\_

Place additional comments concerning education and training desired of new full-time employees on the reverse side of this sheet.

Do you have a formal training program in your firm? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have difficulty securing competent office workers? Yes \_\_\_\_\_

No \_\_\_\_\_ If yes, which area? \_\_\_\_\_

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

Would your firm be willing to provide part-time employment to a cooperative office education student? Yes \_\_\_\_\_ No \_\_\_\_\_

Would you like more information concerning the program? Yes \_\_\_\_\_ No \_\_\_\_\_

Check below the types of office occupations which exist in your firm:

- |   |  |
|---|--|
| <input type="checkbox"/> Receptionist                 | <input type="checkbox"/> File Clerk                    |
| <input type="checkbox"/> Stenographer                 | <input type="checkbox"/> Secretary                     |
| <input type="checkbox"/> Clerk Typist                 | <input type="checkbox"/> Duplicating Machine Operator  |
| <input type="checkbox"/> Calculating Machine Operator | <input type="checkbox"/> General Office Clerk          |
| <input type="checkbox"/> Key Punch Operator           | <input type="checkbox"/> Transcribing Machine Operator |
| <input type="checkbox"/> Word Processing Operator     |  |

Check below the kinds of learning experiences that your firm's office could offer the student:

Typewriting

- Business letter
- Memorandums
- Form letters
- Type and correct spirit masters, stencils, or offset masters
- Printed business forms (invoices, monthly statements, etc.)

Adding and Calculating Machine

- 10-key adding
- 10-key printing calculator
- Electronic calculator

Taking Dictation and Transcribing

- Write shorthand
- Transcribe shorthand
- Operate shorthand machine
- Transcribe from recorded media--belt, disc, etc.

Telephoning and Communicating

- Place local and long distance telephone calls
- Answer telephone
- Screen employers' calls
- Record telephone messages
- Compose business correspondence

Operating Office Machines and Equipment

Typewriters

- Electric
- Manual
- Electronic

Data Processing Equipment

- Key Punch

Word Processing Equipment

Duplicating Machines

- Spirit duplicator
- Stencil duplicator
- Offset duplicator
- Copying machine

Clerical Tasks

- Performing mailing tasks
- Filing
- Financial and record keeping tasks

\_\_\_\_\_  
Name and Title of Company Official

Source: Cooperative, Distributive and Office Education Programs, Bureau of Business Education, California State Department of Education.

## ENROLLMENT

A minimum of 10 students must be enrolled in COE to start a training program, a minimum of 15 students or less for one month extended employment, and 16 students or more for two months extended employment.

In order for a student to enroll in the COE training program, the school may require specific courses, a certain letter grade in required courses, or a specific grade-point average.

There are specific criteria which should be met prior to enrollment. The criteria listed below are in addition to any criteria required by an individual school. The student should:

1. be 16 years of age.
2. be entering his/her senior year.
3. have parental consent.
4. have completed Typing I.
5. have and maintain a "C" average.
6. provide his/her own transportation to the job.
7. have a satisfactory school attendance and disciplinary record.
8. be required to enroll in a related class.

If a student does not meet the criteria outlined above and the criteria set by a school, that student should be discouraged from applying for the COE training program through the use of the recruitment process.

In order to select the most qualified students for the program, there are three stages which should be completed. They are:

1. The Recruitment Process
2. The Application Process
3. The Selection Process

### The Recruitment Process

Recruitment activities should be conducted throughout the year. Most activities are concentrated at certain points in the year: (1) during pre-enrollment or pre-registration time and (2) at the beginning of the school year.

During the recruitment process, a plan should be developed for recruiting students who satisfy the criteria needed for enrollment into the program (Items 1-8 above).

The following steps are recommended for recruiting qualified students.

1. Develop a brochure or one-page flyer outlining the purposes, advantages, prerequisites, and application procedures for the cooperative program. Include directions about a time and place to leave application or to meet with teacher-coordinator. (Appendix C)
2. Use the recommended application form. (Appendix D)
3. Meet with the general faculty and guidance counselors as a group or individually to explain the cooperative program, its benefits to the students and the school, and the application procedures prior to beginning the recruitment process.
4. Supply the department faculty and counselors with recruitment brochures and application forms.
5. Make arrangements for recruitment activities such as:
  - a. Homeroom announcements
  - b. All-school assembly
  - c. After school meeting for interested students
  - d. Speeches in homeroom and prerequisite courses
  - e. Bulletin boards
  - f. Community and/or parents' meetings
  - g. Hand-out brochures to students
  - h. Radio programs, articles in local and school newspapers
  - i. Special career days
6. Conduct your recruitment activities. Be available at the time and place announced.

### The Application Process

Those students who meet the initial criteria should make a formal, written application for enrollment and be interviewed by the teacher-coordinator.

Steps which should be followed in the application process are:

1. The student should fill in and return an application for enrollment. (Appendix D)
2. Schedule an interview with the student applicant at a convenient time and in a quiet, private place. (Appendices E and F)
3. The assistance of the teachers should be requested to assess the "employability" of the COE applicants. (Appendices G, H, and I)

During the application process, the teacher-coordinator should check the students' school records. This may be done before or after the interview.

### The Selection Process

Students should be selected for the program based on their:

1. ability to meet the established criteria.
2. application.
3. interview.
4. recommendations from other teachers.

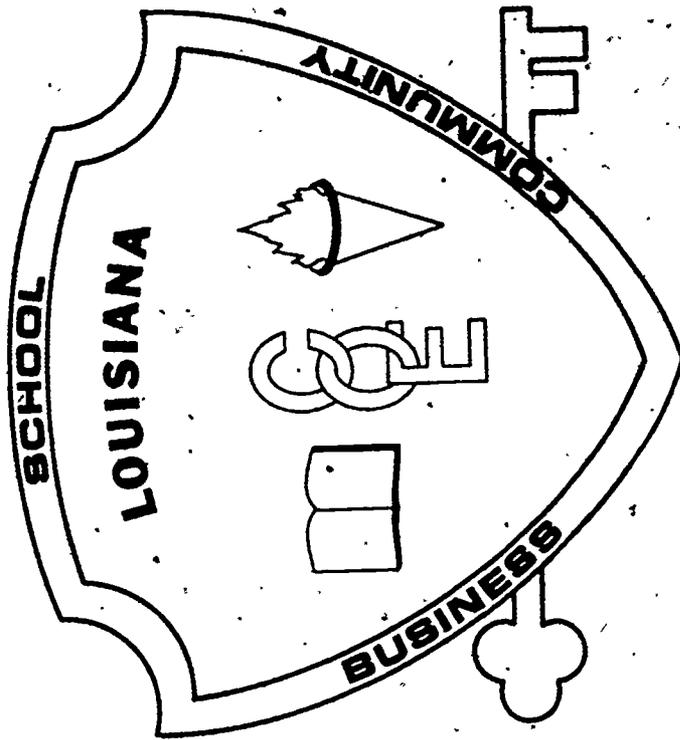
Upon selecting those students eligible for enrollment, the teacher-coordinator should notify the student applicants in person or by letter. (Appendix J)

After the students have been notified, they should sign a student agreement form that itemizes some of the policies and procedures inherent in the cooperative program. (Appendix K)

The students who have been selected must be placed on a job and sign a training agreement before full approval for admittance to the program is final.

APPENDICES C THROUGH K

- APPENDIX C -- RECRUITMENT BROCHURE
- APPENDIX D -- STUDENT'S APPLICATION
- APPENDIX E -- PERSONAL INTERVIEW FORM
- APPENDIX F -- INTERVIEW RATING
- APPENDIX G -- MEMO TO TEACHERS
- APPENDIX H -- FACULTY EVALUATION OF PROSPECTIVE COE STUDENTS
- APPENDIX I -- TEACHER RECOMMENDATION
- APPENDIX J -- LETTER OF NOTIFICATION
- APPENDIX K -- STUDENT AGREEMENT



SCHOOL NAME

(Recruitment Brochure)  
B-28

### What is COE?

Cooperative Office Education is a program of instruction which trains students in stenographic, clerical, data processing, or bookkeeping skills for careers in these fields. It is a partnership between the school, the student, and a local businessman.

Student trainees attend school part-time and receive supervised work experience under actual working conditions for wages.

### What are the requirements for enrollment?

1. Be 16 years of age
2. Be entering his/her senior year
3. Have parental consent
4. Have completed Typing I.
5. Have and maintain a "C" average
6. Provide his/her own transportation to the job
7. Have a satisfactory school attendance and disciplinary record
8. Be required to enroll in a related class

Pick up your application blank in the COE Office today and return it as soon as possible to:

Teacher's Name

in

Room Number

You will be called in for an interview as soon as your application has been processed.

### What are the values of COE training?

1. Gives balanced training between theory and practice.
2. Prepares many for the type of work for which they are adapted.
3. Increases contact with realities of life.
4. Provides actual work experience.
5. Money can be earned while learning.
6. Provides valuable on-the-job training.
7. Assists in developing ability to get along with people.
8. Provides increased chances for advancement.
9. Gives school credit for on-the-job training.
10. Develops self-confidence.
11. Makes school more interesting and meaningful.
12. Provides marketable skills to aid students in more advanced training.
13. Often leads to full-time employment.
14. Motivates interest in school subjects.
15. Provides a tryout in an occupation which may aid in the choice of a life career.

B-29

**APPENDIX D  
COOPERATIVE OFFICE EDUCATION  
STUDENT'S APPLICATION**

Date \_\_\_\_\_

Name \_\_\_\_\_ Sex \_\_\_\_\_ Birthdate \_\_\_\_\_ Age \_\_\_\_\_  
                     Last                      First                      Middle                      Single                      Married

Address \_\_\_\_\_ Telephone \_\_\_\_\_ Race \_\_\_\_\_

Height \_\_\_\_\_ Weight \_\_\_\_\_ General health: Good \_\_\_\_\_ Average \_\_\_\_\_ Poor \_\_\_\_\_

Physical Handicaps \_\_\_\_\_ Homeroom Teacher \_\_\_\_\_

Wear glasses? \_\_\_\_\_ Social Security No. \_\_\_\_\_

Have you had any disciplinary action (suspensions, etc.) in school? Yes \_\_\_\_\_ No \_\_\_\_\_

Days absent \_\_\_\_\_

Are you a member of a family with income at less than \$3,000 a year? Yes \_\_\_\_\_ No \_\_\_\_\_

Are you receiving any special counseling, social work, or physical services? \_\_\_\_\_

High School Subjects and Grades Earned

Freshman Year		Sophomore Year		Junior Year	
Subject	Grade	Subject	Grade	Subject	Grade

In considering preparation for a career, in what type of work do you desire training while attending school?

First choice \_\_\_\_\_ Second choice \_\_\_\_\_

Name of parent or guardian \_\_\_\_\_

Address \_\_\_\_\_ Business Telephone \_\_\_\_\_

Father's Occupation \_\_\_\_\_

Mother's Occupation \_\_\_\_\_

Do you plan to graduate at mid-term? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you plan to marry before graduation? Yes \_\_\_\_\_ No \_\_\_\_\_

What do you plan to do after graduation? \_\_\_\_\_

Are you working now? \_\_\_\_\_ Where? \_\_\_\_\_

Address \_\_\_\_\_ Telephone \_\_\_\_\_

School organizations you belong to \_\_\_\_\_

Church \_\_\_\_\_ Other activities \_\_\_\_\_

What high school teacher would recommend you for the program? \_\_\_\_\_

List jobs you have had: Employer and Address	Types of Duties	Time Period

**APPENDIX E**  
**PERSONAL INTERVIEW FORM**

NAME \_\_\_\_\_ Date \_\_\_\_\_, 19\_\_\_\_

What do you plan to do after graduating from high school? \_\_\_\_\_

If work, what are your ambitions? \_\_\_\_\_

What will you do with the money you earn while in the program? \_\_\_\_\_

Do you like school? YES \_\_\_\_\_ NO \_\_\_\_\_ (WHY) \_\_\_\_\_

Are you enthusiastic over the possibility that you may qualify to take Cooperative Office Education? YES \_\_\_\_\_ NO \_\_\_\_\_  
(WHY) \_\_\_\_\_

What do you think will be the most interesting phase of working in a Cooperative Office Education? \_\_\_\_\_  
\_\_\_\_\_

Are you working now? YES \_\_\_\_\_ NO \_\_\_\_\_ (WHERE) \_\_\_\_\_

How long employed by this firm? \_\_\_\_\_ Present hourly wage \$ \_\_\_\_\_

Do you prefer this firm as your training station (if approved by the Advisory Committee)? YES \_\_\_\_\_ NO \_\_\_\_\_  
(JUSTIFY) \_\_\_\_\_

Do you think the class should have its own club organization, to have social and educational activities of its own planning? YES \_\_\_\_\_ NO \_\_\_\_\_ (WHY) \_\_\_\_\_

If the class should take a field trip, do you think the group should go by private automobile or by public transportation? \_\_\_\_\_  
(WHY) \_\_\_\_\_

If by private automobile, do you agree with school policy of one adult chaperone in each car? YES \_\_\_\_\_ NO \_\_\_\_\_  
(WHY) \_\_\_\_\_

Do you think it is important for a school or place of employment to have policies that determine what a group under its authority may or may not do in the discharge of their duties or obligations to that organization?  
YES \_\_\_\_\_ NO \_\_\_\_\_ (WHY) \_\_\_\_\_

What should an individual do if he is told to do something by his teacher (or employer) even though that individual feels that such action is not necessary or he feels he knows of a better way of accomplishing the same result?  
\_\_\_\_\_  
\_\_\_\_\_

QUALITY	HIGHLY ACCEPTABLE	ACCEPTABLE	DOUBTFUL	NOT ACCEPTABLE
Personality				
Attitude				
Cooperation				
Calmness				
Respect for authority				
Acceptance of policies				



**APPENDIX F  
INTERVIEW RATING**

NAME \_\_\_\_\_ Age \_\_\_\_\_ Date \_\_\_\_\_

QUALITIES TO BE RATED	HIGHLY ACCEPTABLE	ACCEPTABLE	NEEDS HELP
Personal appearance and grooming			
General knowledge for the job			
Persanqlity and manners			
Speech, voice, and conversational ability			
Attitude			
Enthusiasm or interest			
Initiative or originality			
Maturity and poise			
Reasoning and judgment			
Sincerity			
Tone of the interview			

COMMENTS OF THE INTERVIEWER:

Interviewed by \_\_\_\_\_

Organization \_\_\_\_\_

B-32

72/9/236

APPENDIX G

DATE: Current  
TO: Teachers  
FROM: Teacher-Coordinator  
SUBJECT: Evaluation of Cooperative Office Education Applicants

Your assistance is requested to help me to assess the "employability" of prospective COE students. The students should be evaluated in relationship to the following expectations that business has of a beginning student worker.

1. Full day's work for a full day's pay.
2. Adherence to employer's established customs and policies.
3. Proper care of employer's equipment, materials, and supplies.
4. Good judgment in handling confidential company information.
5. Respect for supervisors and other management personnel.
6. Initiative and originality on the job.
7. Regularity of attendance and punctuality.
8. Company loyalty.
9. Appropriate personal appearance and good grooming habits.
10. Accuracy and completeness of assigned tasks.

Please complete and return the attached sheet to my faculty mailbox by (Insert Date). I sincerely appreciate your cooperation.

(Memo to Teachers)

B-33

APPENDIX H  
FACULTY EVALUATION OF PROSPECTIVE COE STUDENTS

COE Applicant	Highly Acceptable	Acceptable	Doubtful	Not Acceptable
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				
16.				

COMMENTS: \_\_\_\_\_

Signature of Teacher: \_\_\_\_\_

Date: \_\_\_\_\_

APPENDIX I  
TEACHER RECOMMENDATION

MEMO TO:

MEMO FROM: COE Coordinator (name)

DATE:

\_\_\_\_\_ has applied for enrollment in the COE program for the coming school year. Please assist me in determining his/her eligibility by supplying the following information:

Subject: \_\_\_\_\_

Grade: \_\_\_\_\_

Attendance: \_\_\_\_\_

Was he/she:

Dependable \_\_\_\_\_

Industrious \_\_\_\_\_

Courteous \_\_\_\_\_

Emotionally stable \_\_\_\_\_

Do you:

Highly recommend \_\_\_\_\_

Recommend \_\_\_\_\_

Cannot recommend \_\_\_\_\_

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signed \_\_\_\_\_

B-35

52

APPENDIX J

Current Date

Name of Applicant  
Street Address  
City, State Zip Code

Dear Applicant:

You have been selected for the 19\_\_ - 19\_\_ Cooperative Office Education class. With this honor comes your responsibility to \_\_\_\_\_ High School to represent it as a model student and office worker at all times.

The COE class will officially begin this summer with parish-wide and local workshops. Dates and time schedules for them will be announced later. Attendance at these workshops is mandatory, so keep that in mind when you are making your personal plans for the first of the summer.

In the meantime, a brief orientation meeting will be held (Insert Date) in Room No. (Insert Room No.). Please make arrangements to be present so that we can discuss your immediate future in COE.

Sincerely,

Teacher-Coordinator

(Letter of Notification)

B-36

53

## APPENDIX K

### COOPERATIVE OFFICE EDUCATION

#### High School

Cooperative Office Education is designed to provide on-the-job training and in-class school preparation for office occupations. Students accepted for this program must be 16 years old, have and maintain a "C" average, be a senior during the training period, provide their own transportation to the job, have a satisfactory school attendance and disciplinary record, and have their parents' approval to be in the program.

Upon acceptance for the Cooperative Office Education program, the student and his/her parents must understand and observe the following requirements and responsibilities:

1. A COE student must complete the full school year in order to receive the 3 credits for the related class instruction and on-the-job training. No COE student who elects to graduate at midterm can expect any partial credit.
2. Students are expected to attend both school and work each day. If a student is absent from school, he/she must receive permission from the coordinator to go to work that day. A student may not attend school in the morning and expect to be permitted to miss work. Attendance at school and work go together. Excessive attendance violations will not be permitted.
3. The COE coordinator must know where each student is at all times during school and work. A student who cannot come to school or report for work must notify the coordinator by 8:30 a.m. No student may leave school without permission of the COE coordinator.
4. Students will be responsible for notifying their employers as early as possible when they will be absent from or late to work.
5. Absences from and tardies to school and/or work must be reported by the student on the appropriate written form to the coordinator.
6. Students will work an average of 15-25 hours per week. The total in-school hours and on-the-job hours should not exceed 48 hours per week.
7. Student work hours are set by individual employers. The student should be willing to work during school vacations such as Thanksgiving, Christmas, etc.
8. Time off from work for valid reasons should be arranged in advance (1-2 weeks) in cooperation with the COE coordinator and the employer.
9. A COE student may not quit his/her job without prior approval of the coordinator. Students not working cannot receive course credit.

10. Wage rates will be set by the employers. The coordinator urges all employers to pay the minimum wage. However, employers may legally elect to pay no less than three-fourths of the minimum wage rate.
11. A COE student is expected to follow the rules of High School and the rules of the training station where he/she is employed. Thefts of money or merchandise or any other serious infraction of employment regulations will not be tolerated.
12. Upon being hired, a COE student should acquaint himself/herself with:
 

Company rules and policies	Dress regulations
Working hours	Pay period
Names and titles of persons with whom he/she works	
13. Rules of etiquette are to be observed at all times.
14. Students will be periodically rated on the job by the training station supervisor. The coordinator will review each student's training station evaluation with him/her at the end of each grading period.
15. Students should keep the coordinator informed about any problems or changes in schedule that may confront them on the job or in school.
16. An interview does not guarantee one a job. Students may be sent on several interviews before they are hired. Students are not guaranteed jobs in a certain geographical area. The coordinator does not decide where a student is hired. The final decision is left up to the employer.
17. COE students will be dues-paying members of the COE club and participate in all club activities which include the          fund raising project and the Employer Appreciation Dinner at the end of the year.

All students in Cooperative Office Education must observe the preceding rules. Infractions of these rules can result in the student's dismissal from the course and a grade of "F."

\_\_\_\_\_  
(Name, Coordinator)

\_\_\_\_\_  
(Name, Principal)

I have read and understand the policies of the \_\_\_\_\_ High School  
Cooperative Office Education program and give my permission for \_\_\_\_\_  
\_\_\_\_\_ to enroll in it. I understand and expect my child to under-  
stand and follow the rules of the program.

\_\_\_\_\_

Date

\_\_\_\_\_

Parent's Signature

I have read and understand the policies of the \_\_\_\_\_ High School  
Cooperative Office Education program. I agree to follow the rules of  
the program at all times while I am a member of the program.

\_\_\_\_\_

Date

\_\_\_\_\_

COE Student's Signature

(Student Agreement) -

B-39

5b

## PLACEMENT

Employment in a Cooperative Office Education program is considered an extension of the classroom instruction. Student placement begins with recruitment. Once enrollment is established, training stations must be carefully evaluated, and student placements should match career objectives, interests, and abilities with jobs at specific training stations. The training station provides diversified and supervised work experience in the occupation selected by the student.

Placement must be mutually acceptable to both employer and student (as well as the parents of a minor) and have the teacher-coordinator's approval. The development and success of a COE program is largely dependent upon the degree to which the coordinator can locate and develop good training stations.

## STAGES IN PLACEMENT

Successful placement involves a step-by-step process that begins with the recruitment and identification of the student-trainees. Basic stages are much the same for all COE programs with the exception of minor additions or adjustments to meet the idiosyncracies of individual school systems.

## TRAINEE INFORMATION

The teacher-coordinator must be fully informed in any and all areas concerning the student-trainee. To avoid unnecessary problems, the student and his/her parents must understand completely what is expected of him/her as a member of the Cooperative Office Education program.

### Identification Card

The student-trainees were selected for enrollment earlier. By now the coordinator has checked to see that they are 16 years of age, have social security numbers and birth certificates, and have indicated a career objective or vocational goal. This data was recorded on each trainee's Student Information Card and placed in the file. (Appendix L)

### Student Agreement

Have a signed student agreement form on file for each student. Before placement, ask each student to sign and return this form. This agreement lets the student know in advance and in writing the policies and procedures of the COE program concerning (a) absenteeism and attendance regulations, (b) credit hours and grades, (c) the role of the coordinator in establishing working hours, hiring, and resigning, and (d) the student's responsibilities to the program. (Appendix K)



## TRAINING STATIONS

The coordinator should develop and maintain a Training Station Resource File for reputable companies that employ individuals for the type of job title needed. Once a training station has been established, maintain it.

### TRAINING STATION RESOURCE FILE

Name of Firm	_____
Type of Business	_____ Date _____
Address	_____ Telephone _____
Contact Person	_____
Type(s) of Jobs Available	_____
Hours	_____ Wages _____
Comments	_____
	_____
	_____

(front)

Student Placed	Dates	Job Title	Comment
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

(back)

## Employer Contact

Visit potential training stations to gain their cooperation. Some coordinators in established programs send a letter to past, as well as potential training stations just prior to starting the placement of students. They ask employers to call or write if they have part-time openings or anticipate having them in the near future. However, the teacher-coordinator should follow a definite criteria in the selection of training stations.

The following items are suggested as criteria in selecting stations.

The prospective training station:

1. should have a good reputation of ethical business practices.
2. should provide a variety of direct experiences associated with the occupation that requires both skills and knowledge and not merely routine work of a repetitive nature.
3. should have a sponsor interested in assisting in the training of the student-learner and in establishing good supervisor and student-learner relationships.
4. should furnish a minimum of fifteen working hours per week.
5. should be accessible to the school.
6. should be willing to pay the student the prevailing wage for beginning workers with similar training and experience.
7. should have up-to-date facilities and equipment.
8. should be safe and free of hazards that might impair the safety or health of the student-learner.
9. should be willing for the coordinator to visit the business and observe the student-learner, as well as provide time for conferences with the coordinator to plan, evaluate, and discuss the student's experience, progress, or problems.
10. should agree to promote school attendance and cooperate with the coordinator in maintaining the standards and rules of the program.

It is equally important that the coordinator have a definite plan for his/her visit with a potential training station before he/she even moves in that direction. The following are suggested guidelines.

Prior to the visit:

1. call and arrange an appointment with a top management person; secure the correct name and title of the person to be visited from the secretary or receptionist.

2. arrive on time.
3. if possible, take along brochures or other information that describes the cooperative program and company benefits.

During the visit:

1. introduce oneself; call the person by name; use the business card.
2. state the purpose of the call.
3. briefly explain the purpose of the cooperative program and emphasize the benefits to the company and the community.
4. encourage questions and answer questions thoroughly.
5. discuss problem areas; meet problems calmly and admit to areas of concern; avoid controversial issues.
6. hand out brochure briefly outlining the program, roles of each party, and suggested procedures. Avoid making the program sound too complicated by itemizing too many details.
7. seek the employer's cooperation - "Will you employ one or two students this year?"
8. if the employer agrees, describe the type of job needed and determine what job(s) they have available. Secure the name of the person one should contact for making further arrangements.
9. even if a "no" answer is received, conclude the interview by thanking the employer. Ask the employer to please call if a suitable job becomes available. Leave information and a business card.

After the visit:

1. record impression of visit on the "Evaluation of a Training Station" form. An example of this form can be found in the EVALUATION PROCESS section.
2. follow-up with a letter thanking the employer for visiting with you and, if appropriate, for agreeing to cooperate as a training station.

## Training Agreement

As one locates job openings and seeks employer cooperation as a training station, work for an understanding concerning the school's needs and the company's needs, as well as the role of each in the program. The general policies are explained on the training agreement; review them with the training sponsor. (Appendix M)

## Student Interviews

Select students for interviews. Talk with each student about the job and establish mutual approval prior to sending him/her on the interview. In selecting students for interviews, take care to match, as nearly as possible, student interests and abilities with the requirements of the job. Ask the employer to confer with the coordinator before making any commitment to a student-applicant.

## Introduction Cards

Give each student-applicant an introduction card that tells the employer that this is the cooperative program student who you discussed with him/her earlier, and who is arriving for an interview. (Appendix N)

Have students report their impressions as soon as they have been interviewed. If a student dislikes a specific situation, the teacher-coordinator should determine what the reason is and decide if it is a legitimate one.

## Trainee Orientation to the Job

Coordinate the student-trainee's orientation to the job. This could be accomplished with a checklist. Use one checklist for each student and mark each item as it is completed. Some items that could be included on the checklist are:

- \_\_\_ 1. Explain the business giving specific information about the area where the student will work.
- \_\_\_ 2. Give the student-trainee the location of the office, names of those with whom he/she will work, and the possible duties he/she could be asked to perform.
- \_\_\_ 3. Inform the student-trainee exactly for whom he/she will be working and where his/her responsibilities lie concerning his/her supervisor.
- \_\_\_ 4. Inform co-workers of their relationship to the student and seek their cooperation.

- \_\_\_ 5. Be certain the student is informed of arrival time, departure time, check-in procedures and check-out procedures.
- \_\_\_ 6. Inform the student of lunch time, relief procedures, and regulations.
- \_\_\_ 7. Be certain the student is informed concerning time-recording procedures, pay schedule, deduction from pay and computation of wages.
- \_\_\_ 8. Inform the student as to appropriate clothing to be worn.
- \_\_\_ 9. Stress the need for confidentiality in any work situation to the student.
- \_\_\_ 10. Seek the cooperation of the employer in providing the student with special pamphlets, brochures, and materials that include information about the company, its policies, fringe benefits, and related terminology.

### Training Plan

Develop the training plan with the training supervisor. A step-by-step training plan should be developed for each student. Listed below are suggested guidelines for the successful use of the training plan.

1. Each student is to have a training plan. A new training plan is necessary each time a student changes job stations.
2. Discuss the proposed training plan with the training station supervisor.
3. Review and update training plans as needed.
4. Complete training plans prior to the beginning of work.
5. Each party affected by the training plan should have a copy for his/her files.

The training plan can be the best understood and most serviceable instrument used in describing the capabilities of the student and the related job requirements. It is an open means of understanding between the coordinator, employer and trainee. (Appendices O and P)

### Related Instruction

Plan related instruction topics and activities based on the training agreement and training plan immediately. Needs determine priorities. The RELATED INSTRUCTION DIVISION provides suggested topics that may need to be reviewed.

APPENDICES M THROUGH P

APPENDIX M -- COE TRAINING AGREEMENT

APPENDIX N -- STUDENT INTRODUCTION CARD

APPENDIX O --- COE TRAINING PLAN

APPENDIX P -- COE TRAINING PLAN

APPENDIX M  
COOPERATIVE OFFICE EDUCATION

TRAINING AGREEMENT

(Name of School) \_\_\_\_\_

The employer \_\_\_\_\_

(Name and Address)

agrees to employ \_\_\_\_\_

(Name and address of student-learner)

on a part-time arrangement. This will serve to outline the conditions under which an effective work-experience program may be carried on.

1. The employer will assist the school in supplementing the cooperative education program by providing diversified work experience on a part-time basis during the school year.
2. The student will attend school half of each day and work a minimum of fifteen (15) hours a week.
3. The employer will assign some members of his organization who will have a continuing responsibility for the training and supervision of the student-learner. The person responsible for this training on the job is

\_\_\_\_\_  
(Name and Title)

4. The student-learner will be paid a beginner's wage of \_\_\_\_\_ per hour.
5. The teacher-coordinator will be permitted to visit the training stations to observe the student at work and evaluate his program.
6. At regular intervals the coordinator will consult with the employer or immediate supervisor of the student-learner for the purpose of evaluating the student's progress.
7. The coordinator will teach courses related to the work of the student, correlate the school instruction with the work experience, and assist the employer in developing the student during employment.
8. The student agrees to report for work punctually and regularly. He also agrees to follow the orders and instructions of the supervisors at all times and perform diligently the work he is assigned.
9. All complaints shall be made to and adjusted by the teacher-coordinator.

10. This agreement may be terminated by the employer at any time after consultation with the teacher-coordinator.

The teacher-coordinator may terminate this agreement at any time after consultation with the employer.

The student may change his place of employment only after consultation with and approval by the teacher-coordinator.

The student will work from \_\_\_\_\_ to \_\_\_\_\_ daily for a total of \_\_\_\_\_ hours a week.

The student's work period will begin \_\_\_\_\_  
(Date of Employment)

SIGNATURES:

\_\_\_\_\_  
Teacher-Coordinator

\_\_\_\_\_  
Administrator

\_\_\_\_\_  
Parent or Guardian

By \_\_\_\_\_  
Employer or Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student-Learner

60

APPENDIX N  
STUDENT INTRODUCTION CARD

COOPERATIVE OFFICE EDUCATION  
INTRODUCTION CARD  
Cooperative Part-Time  
Training Program

---

School \_\_\_\_\_ Date \_\_\_\_\_

---

Company \_\_\_\_\_ Address \_\_\_\_\_

This will introduce \_\_\_\_\_  
who is interested in obtaining part-time employment for at least 15 hours  
per week to supplement the related classroom instruction.

---

C.O.E. Coordinator \_\_\_\_\_ Telephone \_\_\_\_\_ 72/9/229A

APPENDIX O  
STATE OF LOUISIANA  
DEPARTMENT OF EDUCATION  
BATON ROUGE, LOUISIANA

Co-operative Part-Time  
Training Memorandum

PROGRAM \_\_\_\_\_

Employer	Student	Sex	Age	Birthdate
Local Public Schools	Social Security No.	Occupational Objective		O. E. Code
Beginning Salary	Hour Week			
Length of Training Period	Work Permit No.	Year in Vocational Cooperative Program		

This memorandum of training between the above-named student and employer will serve as a plan for training under the co-operative part-time arrangement, and will outline the conditions under which effective training, of great value to both employers and students, may be carried on. It will be considered complete when the employer and teacher-coordinator have outlined on the back the on-the-job training and the related instruction which will be followed by the student-trainee.

**EMPLOYER**

1. The employer shall have final selection of those students who are found qualified for work in the occupation.
2. The employer agrees to offer the student the greatest possible variety of job experiences within the student's individual capabilities to enable him/her to prepare as completely as possible for the occupation for which the training outline prescribes.
3. The training station sponsor will assist the teacher-coordinator by giving pertinent information which will assure the successful progress of the student-trainee.
4. The schedule of compensation shall be mutually agreed upon by the training station and the trainee.
5. An experienced employee shall be assigned to assist in training the student-learner.

**STUDENT**

1. The student agrees to perform diligently the work experiences assigned by the employer according to the same company policies and regulations as apply to regular employees, and his/her employment may be terminated for the same reasons as other employees.
2. The student shall attend school half of each day, including a one hour related class and work in the establishment providing job training experience an average minimum of 15 hours during the school week.
3. Employment shall not be terminated by the trainee without the coordinator's approval.

**PARENTS**

1. The parents are asked to provide co-operation and encouragement to the student as he pursues his training program.
2. The parents (or guardian) will be responsible for the personal conduct of the student-trainee while participating in the cooperative part-time program.
3. The parents (or guardian) will assume full responsibility for any action or happenings pertaining to the student-trainee from the time he leaves school until he reports to his or her training station.
4. The parents (or guardian) and student trainee understand that the cooperative part-time program is organized and maintained primarily for high school students, (Juniors and Seniors 16 years of age or over) to secure training that will better fit them as potential full-time employees in an occupation.

**COORDINATOR**

1. The teacher-coordinator will provide instruction related to the work of the students and will correlate the classroom activities with the on-the-job training.
2. The teacher-coordinator and training station sponsor will work closely together on all problems concerning the mutual welfare of all parties concerned and especially for the successful progress of the student-trainee.
3. The teacher-coordinator will at regular intervals observe the student-trainee while on the job, and check with the training sponsor in order to assure successful occupational progress.
4. The teacher-coordinator shall evaluate the student's related class work and the employer's progress report to determine the student's grade.

**GENERAL**

1. It is understood that the employment of this student will be in accordance with all state and federal labor laws.
2. The employment of a regular employee shall not be terminated to create a position for the training of a student.
3. The trainee is selected without discrimination.
4. The trainee will be given instructions in safety procedures and use of equipment.

THIS TRAINING PLAN IS NOT COMPLETE WITHOUT A TRAINING OUTLINE (Over)

We, the undersigned, indicate by the affixing of our signatures that we have read and understand the purpose and intent of this training memorandum.

By: \_\_\_\_\_  
Training Station Sponsor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Teacher-Coordinator

\_\_\_\_\_  
Address & Telephone

\_\_\_\_\_  
Student-Trainee

\_\_\_\_\_  
Parent or Guardian

\_\_\_\_\_  
Address & Telephone

Division of Vocational Education

B-53

Outline of On-the-Job Training

Outline of Related Assignments

Reverse of Appendix O

APPENDIX P  
 COOPERATIVE OFFICE EDUCATION  
 TRAINING PLAN - 19\_\_\_\_ - 19\_\_\_\_

Business Firm - Training Station
Address
Training Supervisor
Business Telephone
Date of Employment

Student-Trainee
Trainee Job Title/O.E. Code
Work Permit Number
Dates of Training Period
Career Objective

JOB DESCRIPTION:

The student-trainee will consider his job experience as contributing to his career objective and will perform his training-station and classroom duties with equal diligence.

JOB CLASS	TYPEWRITING
	Manual Typewriter
	Electric Typewriter
	Selectric Typewriter
	Executive Typewriter
	Magnetic type selectric (MTST)
	Flexewriter
	Vari-typist
	Business letters
	Printed forms, invoices - pur. orders
	Legal papers and documents
	Financial statements
	Carbon copies
	Proofreading
	Cards, envelopes, labels
	Memorandums and bulletins
	Manuscripts and/or reports
	Form letters and fill-ins
	Tabulated, statistical data
	From rough draft or unarranged data
	Material for duplication (specify)

JOB CLASS	RECEPTIONIST
	Greet visitors
	Maintain log of visitors
	Give information to callers
	Schedule appointments
	Operate switchboard
	Place telephone messages where employer/co-workers will see them
	Make trip reservations for employer
	Prepare itinerary for employer trips
	Keep daily attendance of employees

JOB CLASS

CLERICAL

- Revise and assemble catalogs
- Look up names and addresses
- Collate material (assemble and staple)
- Compile simple periodic reports
- Revise stock lists
- Take inventory
- Time cards - recording, etc.
- Proofread copy
- Prepare requisitions
- Check on supplies (for re-ordering)

MACHINE OPERATION

- Ten-key adding listing machine
- Ten-key printing calculator
- Full-key adding listing machine
- Rotary calculator
- Electronic calculator
- Bookkeeping machine
- Transcribing machine
- Communication equipment
- Stencil duplicator (mimeograph)
- Fluid or spirit duplicator
- Offset duplicator
- Photocopy machine

FILING

- Sort materials for filing
- File by number, names, or dates
- Retrieve materials from files
- Handle cross references
- Keep card indexes
- Revise files
- Make folders and labels for files
- Use microfilming equipment

JOB CLASS

COMPUTING AND ACCOUNTING

- Use fundamental processes of arithmetic
- Compute trade and cash discounts
- Compute amount and percent of markup or loss
- Compute sales tax
- Figure extensions
- Decide charges on work done
- Make out credit memos and invoices
- Make journal entries
- Post entries from journals to ledgers
- Make entries directly to accounts
- Work with subsidiary ledgers
- Prepare trial balance
- Prepare worksheets
- Prepare profit and loss statement
- Prepare adjusting and closing entries
- Close ledger accounts
- Record time clock data on payroll forms
- Compute payrolls for employees
- Calculate deductions (FICA, etc.)
- Maintain individual earnings records
- Write checks for payroll
- Perform recordkeeping tasks
- Prepare monthly statements

MAILING

- Pick up mail (leave desk to obtain)
- Sort mail (for different persons)
- Open mail
- Stamp and log incoming mail
- Sort mail (in priority order)
- Forward or distribute mail
- Address letters, packages, etc.
- Mark, attach, or enclose materials for outgoing mail
- Fold, insert, and seal mail
- Calculate postal rates
- Take mail to mailroom or mailbox
- Keep postage meter record
- Make up mailing lists
- Stuff, bundle, sort, and/or label outgoing bulk mail

JOB  
CLASS

SHORTHAND

- Take dictation from one person
- Take dictation from more than one person
- Take group proceedings and/or conferences
- Take reports in shorthand
- Transcribe notes in rough draft
- Transcribe notes in final form
- Take dictation over the telephone

JOB  
CLASS

OT

DATA PROCESSING

- Keypunch
- Sorter
- Verifier
- Reproducer
- Interpreter
- Collator
- Tabulator
- Board wiring
- Program cards
- Computer operations training

Bv: \_\_\_\_\_  
Training Station Sponsor

\_\_\_\_\_  
Teacher-Cordinator

\_\_\_\_\_  
Parent or Guardian

\_\_\_\_\_  
Student-Trainee

APPENDICES Q THROUGH S

APPENDIX Q -- COE JOB INFORMATION FORM

APPENDIX R -- COE WEEKLY TRAINING STATION REPORT

APPENDIX S -- STATEMENT OF EARNINGS REPORT

APPENDIX Q  
COOPERATIVE OFFICE EDUCATION JOB INFORMATION FORM

Student Employee

Date Employment Began

Name of Firm

Firm Phone Number

Firm Address

Personnel Manager

ZIP

Your Supervisor at Work

Summary of Job:

Number of Student Learners

Hours of Work Per Week

Rate of Pay

Work Schedule: (Hours worked each day)

Duties: Comments

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Student-Learner - Signature

Date

APPENDIX R  
 COOPERATIVE OFFICE EDUCATION  
 WEEKLY TRAINING STATION REPORT

Student-learner \_\_\_\_\_

For week ending \_\_\_\_\_

1. What were your responsibilities on the job this week?
  
2. What did you learn in class that you applied on the job?
  
3. What new knowledge or skill did you learn on the job?
  
4. What mistakes did you make on the job? - What did you do to correct them?
  
5. What could you do in class to help you do a better job at work?
  
6. Briefly describe the "highlight" of the week - an interesting or challenging relationship with a fellow worker, client, or job sponsor.

SUMMARY OF TIME AND EARNINGS

<u>Date</u>	<u>Check-in Time</u>	<u>Check-out Time</u>	Total hours worked _____
			Gross earnings _____
			Deductions:
			Social Security _____
			Withholding _____
			(Less) Total Deductions _____
			Net Pay - - - - _____

**APPENDIX S  
STATEMENT OF EARNINGS REPORT**

Name \_\_\_\_\_  
 Employer \_\_\_\_\_  
 Employer's Address \_\_\_\_\_  
 Employer's Telephone \_\_\_\_\_  
 Immediate Supervisor \_\_\_\_\_  
 Work Permit No. \_\_\_\_\_

Soc. Sec. No. \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Job Title \_\_\_\_\_  
 OE Code \_\_\_\_\_  
 Starting Date \_\_\_\_\_  
 Rate of Pay \_\_\_\_\_  
 Pay Intervals \_\_\_\_\_

<u>Date of Payment</u>	<u>Total Earnings</u>
Summer, 19____	\$ _____
September _____	_____
_____	_____
_____	_____
October _____	_____
_____	_____
_____	_____
November _____	_____
_____	_____
_____	_____
December _____	_____
_____	_____
_____	_____

<u>Date of Payment</u>	<u>Total Earnings</u>
January _____	\$ _____
_____	_____
_____	_____
February _____	_____
_____	_____
_____	_____
March _____	_____
_____	_____
_____	_____
April _____	_____
_____	_____
_____	_____
May _____	_____
_____	_____
_____	_____

SUBTOTAL for 19\_\_\_\_ \$ \_\_\_\_\_  
 (Should equal W-2 form)

SUBTOTAL for 19\_\_\_\_ \$ \_\_\_\_\_  
**TOTAL ANNUAL EARNINGS** \$ \_\_\_\_\_



LEGAL RESPONSIBILITIES

	<u>Page</u>
LEGAL GUIDELINES	C-1
State Child Labor Laws	C-2
Federal Regulations	C-3
APPENDIX	
A. Application for Authorization to Employ a Student-Learner at Subminimum Wages	C-4

C-1  
77

## LEGAL GUIDELINES

It is necessary for the coordinator to be familiar with the legal considerations related to program operation. Guidelines for the teacher-coordinator are listed below.

1. Bias by the teacher-coordinator, administrators and participating employers, on grounds of race, color, national origin, sex, and handicap is prohibited.
2. Discrimination is prohibited in admission, recruitment, treatment of students, financial and employment practices, non-academic services, and health, welfare, and social services.
3. All information handled regarding students should be kept confidential.
4. The teacher-coordinator is expected to inform administrators and participating employers when they may be violating regulations.
5. The teacher-coordinator should discontinue the cooperative arrangement and seek another training station for the student if the employer does not comply with the law.
6. Employers participating in cooperative education programs are eligible for tax credits through the Targeted Jobs Tax Credit (TJTC) established by the Revenue Act of 1978 (P.L. 95-600). The 16- through 18-year-old cooperative education students are included in this group. More information for TJTC should be obtained from the  

Office of Employment Security  
P. O. Box 44094  
Baton Rouge, LA 70804  
Attention: TJTC
7. The coordinator must be familiar with state child labor laws and the minimum wage laws that govern the employment of student workers and minors. It is also the coordinator's responsibility to make certain that the employer in the training station is familiar with this information and that the minimum age for student-learners in the COE Program is 16 years. (The state laws which apply to COE is found at the end of this division.)
8. It is necessary for the coordinator to be familiar with federal regulations that relate to the employment of minors. (The federal regulations which apply to COE is found at the end of this division.)

If additional information is needed concerning state or federal regulations, contact the following offices:

State: Louisiana State Department of Labor  
5360 Florida Blvd.  
Baton Rouge, LA 70806  
(504) 925-4294

Federal: U.S. Department of Labor  
Employment Standards Administration  
Wage and Hour Division  
555 Griffin Square Building  
Griffin and Young Streets  
Dallas, TX 75202

### State Child Labor Laws

Minors shall not be employed, permitted or suffered to work:

1. in oiling, cleaning, or wiping machinery or shafting, or in applying belts or pulleys.
2. in or about any mine or quarry.
3. in or about places where stone cutting or polishing is done.
4. in or about any plant manufacturing explosives or articles containing explosive components, or in the use or transportation of the same.
5. in or about iron or steel manufacturing plants, ore reduction works, smelters, foundries, forging shops, hot rolling mills, or in any other place in which the heat treatment of metals is done.
6. in the operation of machinery used in the cold rolling of heavy metals, or in operation of power-driven machinery for punching, shearing, stamping, bending, or planing metals.
7. in or about sawmills or cooperage stock mills.
8. in the operation of power-driven woodworking machines, or off-bearing from circular saws.
9. in logging operations.
10. as driver of any motor vehicle used for commercial or industrial purposes.
11. in the operation of passenger or freight elevators or hoisting machines.
12. in spray painting or in occupations involving exposure to lead or its compounds, or to dangerous or poisonous dyes and chemicals.
13. in any place or establishment in which alcoholic beverages are served or sold for consumption on the premises, or in which such beverages are manufactured or bottled.
14. in any other place of employment or in any occupation that the commissioner of labor shall, after a public hearing thereon, determine hazardous or injurious to the life, health, safety or welfare of such minors.

15. no minor shall be employed, permitted, or suffered to work for more than five hours continuously without an interval for meals. Such interval shall be included as part of the working hours of the day and in no case shall this interval be reduced to less than thirty minutes.

It is no longer required that students employed through an approved cooperative program obtain a work permit.

A copy of the Cooperative Part-time Training Memorandum (Plan) must be completed jointly by the coordinator and the on-the-job supervisor. The employer must keep a copy on file to meet the requirements of the Louisiana Department of Labor.

### Federal Regulations

1. If students are paid the minimum hourly wage (or more), no student-learner permit is required, and he may work any number of hours under the Federal Regulations.
2. A student-learner may be employed at subminimum wages. Minimum wage to be paid must be not less than 75 percent of current minimum wage. An employer must submit an APPLICATION FOR AUTHORIZATION TO EMPLOY A STUDENT-LEARNER AT SUBMINIMUM WAGES. (Appendix A) Guidelines for this application are:
  - a. Minimum age for the student-learner is 16 years
  - b. The number of hours of employment training each week at subminimum wages, when added to the hours of school instruction shall not exceed 40 hours except:
    - (1) when school is not in session on a school day, the student-learner may work up to eight hours in addition to the weekly hours authorized.
    - (2) during the school term, when school is not in session for the entire week, the student-learner may work a number of hours in addition to those authorized provided that the total hours shall not exceed 40 hours in any such week.
3. The student-learner must have or must secure a Social Security account number.

U.S. Department of Labor  
 Employment Standards Administration  
 Wage and Hour Division  
 555 Griffin Square Building  
 Griffin and Young Streets  
 Dallas, TX 75202

APPENDIX A

Form WH 205 (Rev. 10-70)  
 Budget: B-100 N 13 R-100R

WAGE HOUR USE ONLY	
A	Contract number _____
B	Effective date _____
C	Expiration date _____
D	Reviewing official _____

APPLICATION FOR AUTHORIZATION TO EMPLOY A  
 STUDENT-LEARNER AT SUBMINIMUM WAGES

The school official's certification in Item 23 of this application provides temporary authority to employ the named student-learner under the terms proposed in the application which are in accordance with section 3(c) of the Student Learner Regulations (29 CFR 520). The authority begins on the date the application is forwarded to the Division. At the end of 30 days, this authority is extended to become the approved certificate unless the Administrator or his authorized representative denies the application, issues a certificate with modified terms and conditions, or expressly extends the period of review. Note that the certificate is valid for no more than 1 school year and does not extend beyond the date of graduation.

READ CAREFULLY THE INSTRUCTIONS FOR COMPLETING THIS FORM. PRINT OR TYPE ALL ANSWERS.

1 NAME AND ADDRESS INCLUDING ZIP CODE OF ESTABLISHMENT MAKING APPLICATION		3A NAME AND ADDRESS OF STUDENT-LEARNER	
		B DATE OF BIRTH (Month, day, year)	
2 TYPE OF BUSINESS AND PRODUCTS MANUFACTURED SOLD, OR SERVICES RENDERED.		4 NAME AND ADDRESS INCLUDING ZIP CODE OF SCHOOL IN WHICH STUDENT-LEARNER IS ENROLLED	
5 PROPOSED BEGINNING DATE OF EMPLOYMENT (Month, day, year)		17 TITLE OF STUDENT-LEARNER OCCUPATION	
6 PROPOSED ENDING DATE OF EMPLOYMENT (Month, day, year)		18 NUMBER OF EMPLOYEES IN THIS ESTABLISHMENT	
7 PROPOSED GRADUATION DATE (Month, day, year)		19 NUMBER OF EXPERIENCED EMPLOYEES IN STUDENT-LEARNER'S OCCUPATION	
8 NUMBER OF WEEKS IN SCHOOL YEAR		20 MINIMUM HOURLY WAGE RATE OF EXPERIENCED WORKERS IN ITEM 19	
9 TOTAL HOURS OF SCHOOL INSTRUCTION PER WEEK		21 SUBMINIMUM WAGE(S) TO BE PAID STUDENT-LEARNER (If a progressive wage schedule is proposed, enter each rate and specify the period during which it will be paid):	
10 NUMBER OF SCHOOL HOURS DIRECTLY RELATED TO EMPLOYMENT TRAINING			
11 HOW IS EMPLOYMENT TRAINING SCHEDULED (Weekly, alternate weeks, etc.)			
12 NUMBER OF WEEKS OF EMPLOYMENT TRAINING AT SUBMINIMUM WAGES			
13 NUMBER OF HOURS OF EMPLOYMENT TRAINING A WEEK			
14 ARE FEDERAL VOCATIONAL EDUCATION FUNDS BEING USED FOR THIS PROGRAM?		22 IS AN AGE OR EMPLOYMENT CERTIFICATE ON FILE IN THIS ESTABLISHMENT FOR THIS STUDENT-LEARNER? (If not see instructions)	
15 WAS THIS PROGRAM AUTHORIZED BY THE STATE BOARD OF VOCATIONAL EDUCATION?			
16 IF THE ANSWER TO ITEM 15 IS "NO" GIVE THE NAME OF THE RECOGNIZED EDUCATIONAL BODY WHICH APPROVED THIS PROGRAM		23 IS IT ANTICIPATED THAT THE STUDENT LEARNER WILL BE EMPLOYED IN THE PERFORMANCE OF A GOVERNMENT CONTRACT SUBJECT TO THE WALSH-HEALEY PUBLIC CONTRACTS ACT OR THE SERVICE CONTRACT ACT?	

ATTACH SEPARATE PAGES IF NECESSARY

Form WH 205 (Rev. 10-70)

24. OUTLINE THE SCHOOL INSTRUCTION, DIRECTLY RELATED TO THE EMPLOYMENT TRAINING (list courses, etc.)

25. OUTLINE THE TRAINING ON-THE-JOB (describe briefly the work process in which the student-learner will be trained and list the types of any machines used).

26. SIGNATURE OF STUDENT-LEARNER:

I have read the statements made above and ask that the requested certificate, authorizing my employment training at minimum wages and under the conditions stated, be granted by the Administrator or his authorized representative

(Print or type name of student)

Signature of Student

Date

27. CERTIFICATION BY SCHOOL OFFICIAL:

I certify that the student named herein will be receiving instruction in an accredited school and will be employed pursuant to a bona fide vocational training program, and that the application is properly executed in conformance with section 520 3(c) of the Student-Learner Regulations.

(Print or type name of official)

Signature of School Official

Date

Title

28. CERTIFICATION BY EMPLOYER OR AUTHORIZED REPRESENTATIVE:

I certify, in applying for this certificate, that all of the foregoing statements are, to the best of my knowledge and belief, true and correct.

(Print or type name of employer or representative)

Signature of employer or representative

Date

Title

ATTACH SEPARATE SHEETS IF NECESSARY

G-5

ADVISORY COMMITTEE

THE ADVISORY COMMITTEE

Functions of the Advisory Committee

Recommendations

Page

D-1

D-1

D-1

D-1

83

## THE ADVISORY COMMITTEE

The establishment of an Advisory Committee is mandated by the Vocational Education Act of 1963 as amended in 1976 in order to receive federal funding. The purpose of an Advisory Committee is to advise the teacher-coordinator in planning and implementing the Cooperative Office Education program.

### Functions of the Advisory Committee

The teacher-coordinator may ask the Advisory Committee to perform such functions as:

1. Review goals and objectives of the COE program.
2. Disseminate information about the program to the local business community.
3. Evaluate the COE course content to determine the vocational relevancy of the program as it relates to the employment needs of the business community.
4. Recommend ways to correlate in-school and on-the-job instruction.
5. Present local employment opportunities and job requirements.
6. Assist in locating training stations.
7. Serve as a resource person to vocational classes.
8. Suggest and aid in securing up-to-date classroom materials and equipment.

### Recommendations

The following points should be kept in mind in establishing and using the Advisory Committee.

1. Members may be selected from the following areas:
  - a. Business and industry
  - b. Governmental agencies
  - c. Professional organizations
  - d. News media
  - e. Civic organizations
  - f. School personnel

2. Members should serve for staggered terms in order to provide for experienced membership on the committee at all times.
3. The committee should be chaired by a non-school person with the teacher-coordinator serving as secretary.
4. Two or three formal meetings per year should be sufficient. Meetings should be called only when a planned agenda justifies such meetings.

PUBLIC RELATIONS.

	<u>Page</u>
PUBLIC RELATIONS ACTIVITIES	E-1
General Activities	E-1
Specific Activities	E-2
PROGRAM PROMOTION	E-5
Newspapers/Periodicals	E-5
Preparation of News Releases	E-5
Guidelines	E-5
Photographs for Publication	E-5
Radio/Television	E-6
Public Appearances	E-7
Other Promotional Methods	E-8
Visuals	E-8
Special Events	E-8
Miscellaneous Publications	E-8
Awards and Special Recognition	E-8
Speeches/Demonstrations by Students or Coordinator	E-9
Active Participation by the Teacher-Coordinator	E-9
Miscellaneous	E-9
Personal Letters	E-9
EMPLOYER APPRECIATION ACTIVITY	E-10
Goals	E-10
Guidelines	E-10
APPENDICES	E-12

## PUBLIC RELATIONS

The Cooperative Office Education teacher-coordinator has a unique opportunity to be the public relations person for the COE program, for the school, for the parish, and for the State Department of Education. It is important for the teacher-coordinator to be a master teacher, an excellent coordinator, and a positive, aggressive promoter of cooperative education.

A good public relations program is based on a sound, efficiently conducted program that produces a good product--the well trained worker. The COE program is one of the few educational programs where immediate judgments are tied directly to the product it produces. A satisfied employer, a well-informed school board member, an administrator, a supervisor will promote good public relations for COE.

## PUBLIC RELATIONS ACTIVITIES

### General Activities

Various groups contribute to the general public impression of COE--personnel at training stations, members of civic and professional groups, parents, students, counselors, teachers, administrators, and state department personnel. What these people say about COE will determine the general public's impression of the program. Listed below are ideas related to the various groups that help form the impression of COE:

1. Employers and training station supervisors should be involved in the program. Their participation in program planning, advisory committees, evaluation, and public relations activities keeps them informed and further develops an understanding of their role in the educational process.
2. Employers and training station supervisors may be used as guest speakers in the COE and other business education classes.
3. Good, clear lines of communication with training station supervisors are important. Frequent personal visits are important; written communication in the form of a newsletter informs the employer of what is happening in the local COE programs.
4. The teacher-coordinator's involvement in community civic groups is valuable to the publicity of the program.
5. Opportunities for the teacher-coordinator to speak before civic and professional groups about the COE Program promote goodwill and expand the public's knowledge of the program.

6. Meetings with parents, home visits, direct mail, articles in the school and local newspapers, and personal contacts are means of keeping parents informed of the educationally sound and socially accepted programs.
7. The teacher-coordinator should keep the administration informed of student achievements, placements, evaluations, and other program activities. They may be invited to observe students at work.
8. The greatest public relations contribution by the student is the efficient day-to-day performance on the job with a good attitude.
9. Students can participate in public relations through presentations at meetings, student organizations, and through preparation of informative bulletin boards and displays. National Vocational Education Week is an ideal time for these activities.
10. The teacher-coordinator must keep the entire faculty informed about the values of the program. Communication with faculty through formal meetings, printed materials, and day-to-day informal contacts is helpful.
11. Guidance counselors and coordinators should be members of a team from the start. Day-to-day contacts make counselors realize that their opinions and assistance are important.
12. Counselors can identify prospective students to coordinators. Involve the counselors in the end-of-year appreciation activity.
13. The teacher-coordinator should use a positive approach when communicating with guidance counselors, faculty, and administrators.
14. The State Department of Education is interested in knowing what is happening in COE in the field. They should be kept informed of any unique or new ideas and activities used in the program. A local newsletter is a perfect medium for communicating.

### Specific Activities

Public relations does not begin or end with a specific activity. A well-planned program must be continuous throughout the year. The success of the public relations effort relies heavily on the ability of the teacher-coordinator to keep the public informed. Specific coordination activities involving public relations include the following:

1. Plan and present a school assembly program to acquaint students with the COE program.

2. Explain details of COE program to school board at request of superintendent.
3. Prepare bulletin boards and other displays about COE. Use bulletin boards in rooms of other teachers as well as those in the main halls.
4. Meet with professional groups and trade unions to explain COE program.
5. Confer with guidance department about methods of publicizing program to students.
6. Speak at civic and professional meetings about COE program when invited:
7. Prepare and distribute pamphlets and bulletins (Appendices A and B) about COE program.
8. Prepare and distribute teacher-coordinator's business card (Appendix C)
9. Solicit advisory committee's assistance in publishing information about program.
10. Publish a newsletter (Appendix D) regularly to provide information and news about the program.
11. Advertise program in newspapers and on radio and television.
12. Sponsor an "open house" for employees, teachers, and parents. The open house might be held in connection with a school holiday, such as Thanksgiving, Christmas, etc.
13. Visit junior high schools to give slide presentations, make orientation talks, etc. Use successful students to assist.
14. Conduct an orientation session for parents of COE students.
15. Meet regularly with administrators to keep them informed about program happenings.
16. Plan a public relations calendar and keep up to date.
17. Use holidays and special occasions to remember training station supervisors--birthday cards, Thanksgiving baskets, etc.
18. Sponsor an employer appreciation function--breakfast, luncheon, banquet, etc.--at the end of the school year. Samples of invitations and programs are provided at the end of this section. (Appendices E, F, and G)

19. Present a framed certificate of appreciation to training station sponsors and student-trainees at the end of the school year. (Appendices H, I, and J).
20. Invite program graduates to speak to students about their success.
21. Solicit advice and recommendations from fellow teachers.
22. Invite training station sponsors to spend a day (one or more class periods) at school to view related instruction.
23. Develop a slide, slide/sound, or motion picture story of COE program.
24. Create a traveling display case of classroom work for exhibition in businesses.
25. Exhibit students' work at school board and other meetings.
26. Arrange tours of classroom facilities for prospective students.
27. Honor outstanding students at school assemblies.
28. Have photography class or yearbook photographer take pictures of students at their job stations.

## PROGRAM PROMOTION

### Newspapers/Periodicals

Preparation of news releases. A news release should include the who, what, when, where, how, and why of events reported. A headline should be included. Be sure to include at the top of the page the date, the teacher-coordinator's name, and the telephone number.

Guidelines. When submitting information for publication, keep the following guidelines in mind:

1. Be sure to meet all deadlines.
2. Know the proper contact person; use appropriate channels.
3. Be sure to include all pertinent information in the news release.
4. Type the news release; proofread carefully.
5. Be accurate; check dates, time, names, etc.
6. Be brief.
7. Be honest and impartial. Do not overrate the program.
8. Maintain a businesslike relationship.
9. Be sure to express appreciation for space allowed.
10. Give credit to students, school, or employer.
11. Keep a scrapbook of news stories.
12. Post copies of published articles on bulletin boards in classroom and around the school.

Photographs for publication. If possible, include a photograph with the news release. Keep the following guidelines in mind when submitting a picture:

1. Use a glossy, black-and-white picture; inquire about acceptable size.
2. Attach paper showing caption with scotch tape (do not use staples or paper clips which might damage the picture).
3. Use an action shot if possible.
4. Be sure names of individuals in picture are in proper order and spelled correctly.

## Radio/Television

Radio and television stations are required to allot time for public service announcements (PSA). The teacher-coordinator should take advantage of this opportunity to publicize the COE program. The following "spot" announcements might be adapted for use as a PSA promoting the COE program:

Employers! You have always supplied the fringe benefits. It's time you got one. Your local high school is proud to present: Cooperative Office Education--COE. COE is the chance for you to hire student employees--trained, motivated individuals-- whose only desire is to work productively. They will work for you, learn from you, and you will save both money and hassles. Employers, it's your turn--cash in on the benefits. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

Employers! Succeeding in business is a gamble. At a time when the economy is stacking the odds against you, you need to consider hiring a Cooperative Office Education student. COE can help your business operate economically and efficiently. COE provides you with trained, highly motivated employees. They will learn from you and earn for you. It's a good bet. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

Employers! Do you sometimes get the feeling that your employees are "shopping around"--that employees "try you on" and then leave? It's frustrating, and it costs you in time, money, and effort. Well, here's a break: Cooperative Office Education (COE) brings you prospective employees--trained, motivated, high school seniors who will learn from you and earn for you. COE fits employees to your needs. You do the evaluating; you reap the benefits. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

Mr. Businessman! Do you need a part-time office worker--someone to answer the phone or file while your secretary uses her skills for more demanding tasks. Perhaps you need someone to help with routine typing assignments. Consider hiring a Cooperative Office Education (COE) student from one of your local high schools. COE can help you with your work overload and at the same time provide valuable, supervised work experience for skilled high school seniors. Through the COE program, students attend classes during the mornings and work in local offices during the afternoons. Call the COE office at your local high school or the vocational supervisor at the (name of parish) school board at (telephone number).

In addition, some stations have local talk shows which are aimed at keeping the community informed of local activities. The teacher-coordinator may be able to arrange for an on-the-air interview. If such an interview is possible, the following list of questions are recommended for presentation:

1. What is Cooperative Office Education (COE)?
2. How does a COE program operate?
3. What other subjects do the students take while in the program?
4. Who is eligible to participate in the COE program?
5. How are students selected?
6. How many credits may be earned?
7. Are the students paid while taking their on-the-job training?
8. What are some of the advantages or benefits of the program?
9. What training is required of the teacher-coordinator?
10. How many schools offer the COE program?
11. What are the plans for expanding COE opportunities?
12. What student organizations are involved in COE?

#### Public Appearances

Presenting the COE story to a group requires skill and practice. The presentation should be well-planned and interesting. Below are suggestions for making speeches:

1. Dress in professional business apparel.
2. Be direct and straightforward.
3. Put audience at ease by being at ease yourself.
4. Know subject matter and speak with authority.
5. Concentrate on communicating the idea and ideals of COE.
6. Speak clearly in the language of the audience.

7. Keep personal accomplishments out of the speech as much as possible.
8. Develop an outline that is easy to follow.
9. Have a good beginning and ending for presentation.
10. Prove points with human illustrations.

### Other Promotional Methods

#### Visuals:

Filmstrips  
 Slides  
 Displays/exhibits  
 Posters  
 Bulletin boards

Photographs  
 Charts  
 Transparencies  
 Video tapes  
 Scrapbook

#### Special Events:

Career Day  
 Business and Industry  
 Day  
 Vocational Education  
 Week  
 Open house  
 Field trips

FBLA district and state conferences  
 Training sponsor events  
 Employer appreciation activity  
 Courtesy campaign  
 Fair  
 Coffees/teas  
 Programs for parents

#### Miscellaneous Publications:

School newspaper  
 Club magazines/bulletins  
 Newsletter  
 Trade journals  
 Educational magazines

Mailings  
 Pamphlets/brochures  
 School yearbook  
 Handbills

#### Awards and Special Recognition:

Certificates, students  
 Certificates, employers  
 Trophies/plaques  
 Special recognition  
 awards

Employer-of-the-Month Award  
 Employee-of-the-Month Award  
 Employer-of-the-Year Award  
 Employee-of-the-Year Award  
 Appreciation awards

Speeches/Demonstrations by Students or Teacher-Coordinator to:

Civic groups	PTA or other parent group
Service groups	Student groups
Business/professional groups	Faculty

Active Participation by the Teacher-Coordinator:

Professional organizations	Student organizations
Trade associations	Chamber of Commerce
Civic organizations	Community activities

Miscellaneous:

Billboards	Yearbook ads illustrating students at work
Bumper stickers	Industry participation stickers
Personal contacts	Public Information Sub-Committee of Advisory Committee
Business cards	Employment consulting
Student organization projects	Business consulting
Business ads illustrating students at work	

Personal Letters. Form letters may be created to cover different occasions that arise repeatedly. The same letter may be used periodically with some revision from time to time. Some suggestions for letters are:

1. Informative letters to congressmen and state legislators relative to current issues important to vocational education.
2. Invitations to parents, school administrators, and/or business leaders to attend various functions at the school, including the employer appreciation activity.
3. "Thank You" letters to individuals and businesses who have contributed to the success of the program.
4. Promotion letters to students, parents, and businesses.
5. Congratulatory letters for any special recognition received by student, parent, or employer.

## EMPLOYER APPRECIATION ACTIVITY

At the end of the school year, it is appropriate to recognize and show appreciation for the employers who have worked with the COE students during the year. Everyone likes to be appreciated and acknowledged. There are many activities that are appropriate from the very formal to the very casual.

1. Formal banquet
2. Dinner theatre
3. Luncheon
4. Breakfast
5. Barbeque
6. Crawfish or seafood boil

### Goals

The appreciation event is used to achieve several goals. Whether the event is a banquet or a casual event, it should reflect these goals:

1. To show appreciation to the business community for working with students.
2. To provide for student leadership in planning such an event.
3. To acquaint individuals with the scope of COE.
4. To enable the school administration and faculty to continue relationships with those employers working with COE.
5. To recognize outstanding contributions.
6. To recognize student leadership.
7. To develop group spirit and pride.

### Guidelines

The following guidelines should be kept in mind in planning and conducting the employer appreciation activity:

1. Involve students in all phases of planning and executing of the event.

2. Develop a long-range plan for financing the event.
3. Keep the superintendent, principal, vocational sponsor, and other school authorities informed of the event.
4. Create attractive and appropriate invitations.
5. Greet guests appropriately:
6. Use name tags to help guests get acquainted.
7. Plan a varied program that moves fast. Set a schedule and follow it.
8. Keep a file on employer appreciation activities.
9. Publicize the activity before and after presentation. Take pictures during the event.
10. Honor all employers with framed certificates or other appropriate awards.
11. Honor students appropriately.
12. Present special recognition awards to selected employers and students.

APPENDICES A AND B  
GOE PAMPHLETS

## WHAT IT IS

**COOPERATIVE OFFICE EDUCATION** is a program of instruction in stenographic, clerical, data processing, or bookkeeping skills which trains students in careers in these fields. It is a partnership between the school, the student, and a local businessman.

**STUDENT TRAINEES** attend school part-time and receive supervised work experience under actual working conditions for wages.

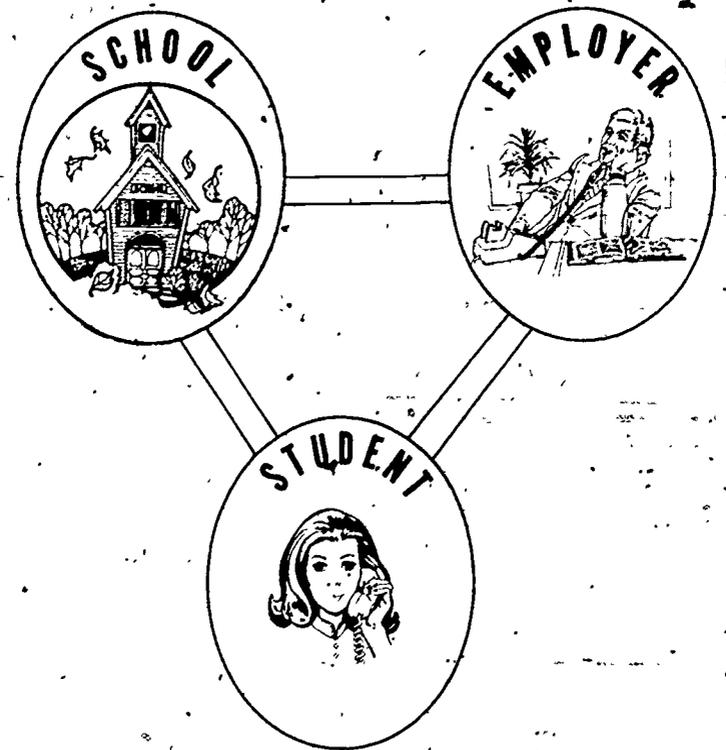
**TRAINING ESTABLISHMENTS** are local business firms.

**RELATED CLASSROOM INSTRUCTION** is designed to correlate business experience with school learnings.

**TEACHER-COORDINATOR** is the connecting link between the school and the local business. The teacher-coordinator is an experienced office worker.

E-14

# FORM A PROFITABLE PARTNERSHIP



APPENDIX A  
Example of a Pamphlet for Prospective Employers

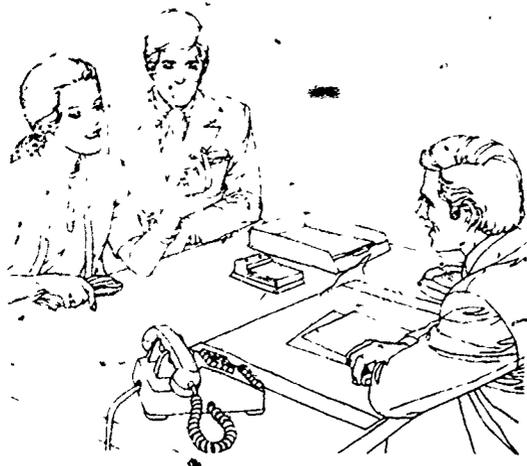
**YOUR COOPERATIVE OFFICE EDUCATION**

9. **COORDINATOR IS AT YOUR SERVICE**

**COOPERATIVE OFFICE EDUCATION**

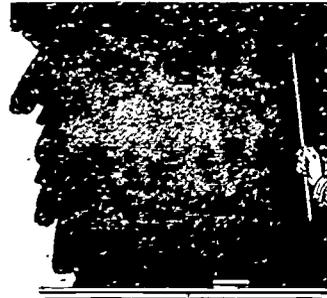
East Baton Rouge Parish

10.



## THE EMPLOYER

- \*Agrees to employ a student of his choice
- \*Cooperates with teacher-coordinator
- \*Assists in determining wages and hours student will work
- \*Assists coordinator with a written training plan for the student
- \*Makes periodic evaluations of the student's progress
- \*Determines policy by serving on the advisory committee when requested
- \*Assists student in planning future career and training



## THE TEACHER COORDINATOR

- \*Provides related learning experience in the classroom
- \*With assistance of employer determines the training plan for the student
- \*Makes regular visits to the training station to observe the student and to confer with supervisor
- \*Coordinates the objectives of business and office education with needs of local businessmen
- \*Fits job assignment to student's career objective
- \*Keeps complete records concerning student and his performance



## THE C.O.E. STUDENT

- \*Is a loyal, mature employee eager to learn
- \*Accepts criticism as an aid to learning
- \*Has a career objective in the business and office education field
- \*Maintains an excellent attendance record on the job and at school
- \*Conforms to the appearance standards set by the employer and the school
- \*Knows the value of human relations in dealing with fellow employees
- \*Brings any problems to coordinator and/or employer

E-15

**TEACHER  
COORDINATOR'S  
RESPONSIBILITIES**

Provides related learning experiences in the classroom.

Coordinates with employer, and/or training station supervisor on the job, about a training program agreement for each student.

E-16 Visits the student-trainee periodically on-the-job.

Discusses overall policies with the employer.

Reviews the student's progress with the training station supervisor.

Acquaints students with occupational opportunities and requirements in the field of business. Helps develop training standards. Maintains harmonious relationships with various community organizations.

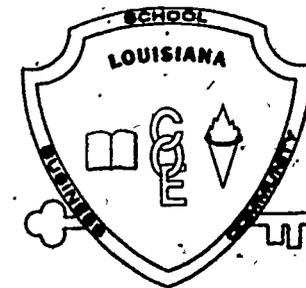
Interprets accurately and clearly the objectives of the cooperative office education program.

Works with school principal and faculty members in organizing related classes.

Confers with persons interested in cooperative office education.

TO

**Cooperative Office Education**



**A Cooperative Vocational  
Education Program**

sponsored by the

**Terrebonne Parish School Board,**

through

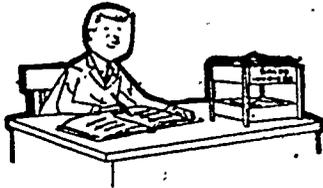
**H.L. Bourgeois High School**

**South Terrebonne High School**

and

**Terrebonne High School**

APPENDIX B  
Example of a Pamphlet for Prospective Employers



### EMPLOYER'S RESPONSIBILITIES

Understands and accepts the Cooperative Office Education Program.

Interviews and hires or rejects applicants sent by the school. Explains company policies and rules.

Agrees to employ a student-learner for the entire school year.

Provides diversified and supervised work experience. Has a personal interview periodically with the student.

Complies with State and Federal regulations concerning Fair Labor Standards.

Assists in affecting the transition from student to employee.

Calls the coordinator for aid in adjusting major problems. Notifies the coordinator before discharging a student.

Evaluates progress of each student-trainee periodically.

### WHAT IS COOPERATIVE OFFICE EDUCATION?

Cooperative Office Education is a vocational business education program for high school seniors who plan a career in clerical work. It is designed to affect the transition from student to employee through a combination of classroom instruction and actual experience in the laboratory of the business world.

The student attends school in the morning and receives on-the-job training in an office during the afternoon.

Each student trainee receives three units of credit for the successful classroom and job performance. In addition, he is paid a minimum wage in the training status period.

C.O.E. is taught by a qualified teacher-coordinator who is aware of the needs of both the businessman and the student-learner.

A successful Cooperative Office Education Program is the result of cooperative participation by the school, the employer, the parent and the student.



### STUDENT'S RESPONSIBILITIES

Is a loyal employee in the business in which he is working. Is honest, dependable, and willing to accept responsibility.

Keeps a good attendance record in the office and in school.

Notifies coordinator and employer of anticipated absence.

Is clean, neat and dressed to meet the requirements of the job.

Is courteous and considerate of others. Has a harmonious working relationship with business personnel and employees.

Accepts criticism as an aid to learning.

Develops good work habits. Is interested, alert and accurate.

Is a high school senior, in good health, and at least 16 years of age.

Provides own transportation to and from work.

APPENDIX C

TEACHER-COORDINATOR BUSINESS CARDS

APPENDIX C

Examples of Business Card of Teacher-Coordinator



**MILDRED ANN HENRY**  
Coordinator

**COOPERATIVE OFFICE EDUCATION**  
Baker High School

3200 Groom Road Baker, LA 70714 (504) 775-1119  
or 775-1259

H. L. BOURGEOIS  
HIGH SCHOOL

GRAY, LA  
70359

**MRS. MYRA M. STARR**  
**COOPERATIVE OFFICE EDUCATION**  
**COORDINATOR**

SCHOOL OFFICE  
872-3273

RESIDENCE  
875-3159



**ISTROUMA SENIOR HIGH SCHOOL**

**COOPERATIVE OFFICE EDUCATION**  
**SANDRA E. KING**  
Coordinator

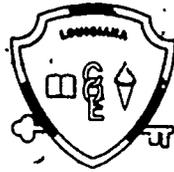
3730 Winbourne Ave.  
Baton Rouge, LA. 70805

C.O.E. Office 355-4900  
Main Office 355-7701

APPENDIX D  
COE NEWSLETTER

10.

E-22



STATE SUPERINTENDENT COMMENDS  
COE PROGRAMS

Cooperative Office Education is an excellent program for our students, primarily because it provides on-site work experience. This method of learning and earning is of significant tangible value. In work places throughout the state, students are able to make realistic occupational decisions and choices. There is no better way to integrate classroom experience and practical work application.

As Superintendent of Education, I commend this program and all of its participants and coordinators. Keep up the good work!

J. Kelly Nix  
State Superintendent of Education

STATEMENT BY ASSISTANT  
SUPERINTENDENT OF EDUCATION

Vocational education in Louisiana is a vast complex of inter-related occupational areas. Having been a high school principal for a number of years, I am most appreciative of the contributions that COE makes to the total program of vocational education. It is through cooperative training that students are able to explore career opportunities and learn an occupation that, in many instances, leads to a lifetime of productive employment.

We, of the Department of Education, will continue to place a high priority on Cooperative Office Education and will expand our efforts to offer technical assistance to the local education agencies where needed.

Again, may I commend you for your efforts.

Dr. N. J. Stafford, Jr.  
Assistant Superintendent  
Office of Vocational Education

"HEY, MISTER

(MRS., MISS, or MS.)..."

wanna buy a candy bar or a mug or a Christmas ornament, or greeting cards?"...the list is endless.

Although limited vocational funds are provided for supplies and equipment for COE students, no funds are available for extra-curricular activities. Thus, each COE program must include as part of its annual activities some type of fund-raising project. The projects vary, but the common goal is providing funds for the annual employer appreciation function. To all of you who cooperate with our fund-raising projects, we would like to take this means of thanking you--we really appreciate your help.

APOLOGIES TO  
McKINLEY COORDINATORS

In the September issue of the COE Newsletter, the paragraph listing the present and former coordinators of the McKinley COE program was inadvertently omitted from the article entitled "Growth of Cooperative Office Education in East Baton Rouge Parish."

Mrs. Jeanette Langridge Kaub started the COE program at McKinley in 1970. The following teachers have served as coordinators: Mrs. Avis White, Ms. Carol Borskey, Mrs. Donna Murray, and Mrs. Heather Babin. Mrs. Beleta Bischoff is the present coordinator of the program, beginning her third year with the 1981-82 school term.

MERRY CHRISTMAS  
and  
HAPPY NEW YEAR  
from

The COE Coordinators

## THE EMPLOYER'S VIEW . . .

Cooperative Office Education (COE) is a cooperative program between the schools and local businesses. Our uniqueness is the on-the-job training which our students receive. Without the participation of the employer, COE would simply be another business education course. Our goal is to provide a course which is mutually beneficial to the student, the school, and the local business community.

\* \* \* \* \*

"I need half a person, or actually a whole person half the time."

Through my years in public accounting practice in Baker I have heard these words many times from my local clients. As a business grows, it needs more workers, but if it is a slow, steady growth, then at a certain point in time, half a person would do fine.

I have recommended hiring a COE student to many of my clients. It is the perfect solution to the problem. The old saying that I would not recommend something to you that I did not use myself is appropriate in this instance. I have used ten COE students over the years. In fact, two of them are still employed by our firm.

I have discovered that the students want to work. This is the most important qualification of all. A person will learn the job if he/she wants to work. The smartest person in the world will not do a good job if he/she does not have the desire to work.

So, if you need half a person to do a job, I recommend a COE student highly.

John D. Butler  
Butler & Bryant  
Certified Public Accountants

American Bank participates in the East Baton Rouge Parish COE program not only because we can use excellent part-time help, but it plays a very important part in our clerical recruiting program. The retention rate of employees has been 85-90%. One of our

Branch Managers came to us as a COE student, worked part-time while attending LSU and is now managing a branch. Also, we have an Assistant Branch Manager who started as a COE student.

Because of the close supervision of the COE coordinators, we have experienced very few problems. The coordinators keep in touch with the immediate supervisor(s) and by doing this they are always on top of any problems that may arise. A COE student is not only taught good clerical skills, but how to dress professionally and a lot of just plain business courtesy.

I personally feel this program is one of the best the public school system has to offer.

Edna Browning  
Personnel Officer  
American Bank & Trust Company

Our Company began participation in the COE program in 1968. We have employed a total of six (6) girls since that time, and of the six, four are still with us. We were a small organization in 1968 and therefore were able to expend the time training these employees according to our needs and expectations. They, in turn, grew with our organization and to date have moved into executive secretarial positions. By their knowledge of the day-to-day operations, they are able to contribute heavily to make for smoother daily operations.

Tillmon H. Huckeba  
Executive Vice President  
F. C. Schaffer & Associates, Inc.

Student workers have long been valuable additions to our staffs of Medical Records Departments. Our association with the Tara COE program over the past several years has resulted in productive employee relationships, fostered by sound classroom preparation, and the concern for good performance of the coordinator.

Jean B. Daily, RRA  
Director, Medical Records Service  
Baton Rouge General Hospital

## THE GRADUATE'S VIEW . . .

"As a former student of the COE program, I would like to comment on its value for the office worker. The program provided an excellent opportunity to get started in the business world through a part-time job. The program also provided training in basic office skills necessary for 'on-the-job' experiences. Through sharing office experiences with fellow classmates, I was able to benefit from their ideas and suggestions on the different situations. In my opinion, the COE program is an outstanding way in which a young office/clerical worker can make the transition into the business world."

Marilyn Carpenter  
F. C. Schaffer & Associates, Inc.  
(Broadmoor COE)

"I started my career in the Co-operative Office Education class of 1970-71. I had decided to pursue a business career, however, did not intend to go to college. I was placed in a receptionist-typist position through the COE program on a part-time basis for that school year. At the end of that time, I was asked to continue my employment on a full-time basis as a secretary. As the company grew, so did my career. I am presently the office manager of the same corporation.

"Had it not been for the COE program, I would never have been given the opportunity to be trained on the job and gain the experience and knowledge I now have."

Geralyn C. Graphia  
F. C. Schaffer & Associates, Inc.  
(Broadmoor COE)

"I just wanted to thank you (Mrs. Tull) for all of your work.. with each of us and (for the) time you took to work with our employers to see that we had a good opportunity to learn new things in a business atmosphere. . . There are new things that I learn each day, some from mistakes, and some from watching other people; but the

most helpful tool was my COE training."

Trish Coe  
IBM Corporation  
(Belaire COE)

"Due to the COE program, my life took a turn for the best. I now have job security and a bright future with a firm that is rapidly expanding.

"Because of my on-the-job training, the knowledge I have gained has enabled me to travel extensively, working in various parts of the world such as Central America, Europe and Africa.

"Three cheers for COE!"  
Debra L. Blacher  
F. C. Schaffer & Associates, Inc.  
(Broadmoor COE)

". . .(COE) helps you learn different types of tasks, how to be responsible, and how to work well with others. It also helps you to understand and learn about the business world. COE helped me get the career I wanted."

Glenda McKnight  
Louisiana National Bank  
(McKinley COE)

"I feel the COE program was very beneficial to me because I was not sure I wanted to go to college. The program got me a job that I probably would not have been able to get as a high school graduate with no office experience."

Sarah Sanders  
(Woodlawn COE)

"COE helped me locate my book-keeping/secretarial job that I have now had for over five years. COE helped me acquire the skills I needed."

Pallas Dedon  
Butler & Bryant, CPA's  
(Woodlawn COE)

"In my opinion, COE was the most useful course for me in high school."

Melissa Mayer  
(Woodlawn COE)

MANAGEMENT'S MEASURING STICK\*

- She looks the part--attractively and tastefully groomed in appropriate business-like attire.
- She is in good health and has a good attendance record.
- Her voice is pleasant and well modulated.
- Her speech is clear, grammatically correct, and expressive.
- Her telephone manner is friendly and courteous, and she is efficient in handling calls for others as well as herself.
- She is punctual.
- She possesses the skills and the ability to undertake more advanced work.
- She is accurate in her work, and careful in such details as proofreading, figuring, and filing.
- She can be counted on to do a job right the first time.
- She can follow instructions and work without constant supervision and direction.
- She can give instructions to others in a clear, logical manner that can be easily understood.
- She is so well liked by all the staff that she receives excellent cooperation from them.
- She has a considerate nature, a pleasant disposition, and an even temperament.
- She has a dignified, business-like demeanor.
- She possesses the social and intellectual polish that enables her to associate easily with all types of people.
- She has the ability to concentrate well.
- She is courteous and tactful even with disagreeable customers and callers.
- She can work well under pressure, keeping her wits and maintaining her poise throughout.
- She can be counted on to keep confidences and to resist gossip.
- She possesses efficient work habits.
- She is watchful for ways to improve work methods or to cut costs.
- She works willingly despite occasional emergencies that might entail overtime.
- She is concerned with the welfare of the company and of its customers.
- She works well alone or as a member of a team.
- She can adjust easily to her superiors.
- She can take criticism calmly and can evaluate it impersonally.
- She is considerate of her employer's time, and tries to relieve him/her of any tasks she can handle.
- She does not let her personal troubles interfere with business.
- She separates business and pleasure to the extent that her social phoning, shopping sprees, hairdressing appointments, and so on, do not infringe on company time.
- She does not let her office socializing get out of bounds.

\*Taken from CHARM by Whitcomb and Lang.

DIRECTORY OF COE PROGRAMS AND COORDINATORS

Baker/Mrs. M. Henry . . . .	.775-1119
Belaire/Mrs. R. Tuil . . . .	.272-9949
Broadmoor/Mrs. J. Kaub . . . .	.926-5486
Capitol/Mrs. S. Potts . . . .	.387-0244
Central/Mrs. J. Smith . . . .	.261-5768
Glen Oaks/Mrs. J. White . . . .	.355-3771
Istrouma/Miss S. King . . . .	.355-4900
McKinley/Mrs. B. Bischoff . . . .	.343-2150
Lee/Mrs. S. Fleet . . . . .	.344-7189
Tara/Mrs. I. Shaw . . . . .	.928-0122
Woodlawn/Mrs. R. Almond . . . .	.292-4122

\*\*\*\*\*  
 Co-editors of the December 1981 issue of the COE Newsletter were Sandra King and Jeannine Smith.

\*\*\*\*\*



APPENDICES E, F, AND G

COE INVITATIONS AND PROGRAMS FOR AN  
EMPLOYER APPRECIATION FUNCTION

APPENDIX E

Example of an Invitation to the Employer Appreciation Function

*The Istrouma  
Cooperative Office Education Class*  
requests the honor of your presence  
at its Employer Appreciation Luncheon

on

*Friday, April 23, 1982*

*12:00 noon*

*at the Baton Rouge Hilton*

Guest of \_\_\_\_\_

*R.S.V.P. 355-4900*

*8 a.m. to 12 noon*

APPENDIX F

Example of Program Cover for Employer Appreciation Function

BELAIRE C. O. E.

presents

A TOUCH OF THE OLD SOUTH



1980 - 1981

E-31 116

Example of a Program for the Employer Appreciation Function

Baker High School

1981-1982

COOPERATIVE OFFICE EDUCATION

COOPERATIVE OFFICE EDUCATION

Students

- |                   |                      |
|-------------------|----------------------|
| Deborah Alexander | Lisa Loudon          |
| Roxane Ardoin     | Suzanne Maglone      |
| Penny Bishop      | Sherry McAllister    |
| Rebecca Bogan     | Angie McCearley      |
| Paula Boudreaux   | Patricia Netterville |
| Debra Colligan    | Trudy O'Callaghan    |
| Amy Calder        | Tracy O'Neal         |
| Tonna Dodon       | Kimberly Robertson   |
| Annette Dixon     | Tina Rogers          |
| Leslie Dodson     | Mary Alice Smith     |
| Keri Faulkner     | Denise Smith         |
| Emily Hicks       | Valerie White        |
| Gwendolyn Keith   | Teresa Wilson        |
| Terri Krumholt    | April Worthy         |
| Lisa Lee          |                      |

Coordinator  
Mildred Ann Henry



EMPLOYER APPRECIATION DINNER

Continental Room  
Bellemont Motor Hotel  
May 11, 1982

EMPLOYERS

- American Bank & Trust Co.
- Associated Enterprises
- Baker Police
- Baker Utilities
- Big Jim's Mobile Homes
- Butler & Bryant, CPA's
- Keith Cox State Farm Insurance
- Donaldson's Auto & Cycle Parts
- East Baton Rouge Parish School Board
- First State Bank & Trust Co.
- G. P. Federal Credit Union
- Larry Germany, D.D.S.
- Group W Cable
- La Capitol Federal Credit Union
- Louisiana Department of Justice
- Louisiana Division of Administration
- Louisiana National Bank
- Lowe's of Baker Inc.
- Mayor of Baker
- Motor Parts & Supply Co., Inc.
- Otha Nelson, Attorney
- Parker's Quality Meats Inc.
- Reliable Credit Corp.
- Sears, Roebuck & Co.
- Tiger Rag Magazine
- Zetz 7-Up Bottling Co

PROGRAM

Trudy O'Callaghan, COE President, Presiding

- INVOCATION..... Emily Hicks  
Vice President
- INTRODUCTIONS.... Gwen Keith & Mary Alice Smith  
Secretary Treasurer
- STUDENT ACHIEVEMENTS ..... Allen Spears  
Assistant Principal Instruction
- STUDENT CERTIFICATES..... Mildred Ann Henry  
Coordinator
- EMPLOYER CERTIFICATES  
AWARDS..... Jerry Epperson  
Principal
- BOSS OF THE YEAR AWARD..... Richie Eubank  
Assistant Principal
- BENEDICTION..... Tina Rogers  
Reporter

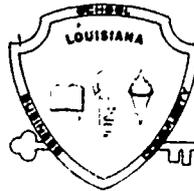
APPENDICES H, I, AND J  
CERTIFICATES OF APPRECIATION

E-34

110

Example of a Certificate of Appreciation for the Employer

# Cooperative Office Education of Louisiana Public Schools



## Certificate of Appreciation

awarded to

\_\_\_\_\_

by \_\_\_\_\_ High School

In recognition of cooperation and participation in Office Training for

\_\_\_\_\_ years.

\_\_\_\_\_  
STATE SUPERINTENDENT OF EDUCATION

\_\_\_\_\_  
BUSINESS AND OFFICE EDUCATION

\_\_\_\_\_  
PRINCIPAL

\_\_\_\_\_  
COORDINATOR

Certificates may be obtained from the State Department.

E-36

# Baker High School

East Baton Rouge Parish



This certificate is awarded to

---

in recognition of contribution to the office training of

---

for the year

---

(Seal of School)

---

Parish Superintendent

---

Parish Coordinator of Vocational Education

---

Principal

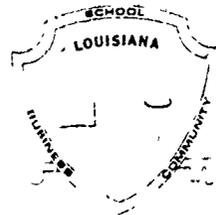
---

Coordinator

E-37

120

# East Baton Rouge Parish



This certificate is awarded to

\_\_\_\_\_

in recognition of participation in Cooperative Office Education  
for the year

\_\_\_\_\_

(Seal of School)

\_\_\_\_\_  
Superintendent of Schools

\_\_\_\_\_  
Parish Coordinator of Vocational Education

\_\_\_\_\_  
Principal

\_\_\_\_\_  
Coordinator

121

CLASSROOM NECESSITIES

	<u>Page</u>
FACILITIES, EQUIPMENT, AND SUPPLIES	F-1
Facilities	F-1
Equipment	F-1
Supplies	F-3
APPENDIX	
A. Model Room Layout	F-4

## FACILITIES, EQUIPMENT, AND SUPPLIES

Classroom accommodations for a COE program will vary and will require adjustments as needs and finances change.

### Facilities

Instructional facilities may consist of one related classroom where other business subjects are taught, several fully equipped rooms, or laboratories which may or may not be shared with other business teachers. The classroom should appear as businesslike as possible while providing work stations that accommodate needed equipment, supplies, and work space.

The following should be considered when furnishing the COE classroom:

1. Ample electrical outlets in safe, convenient locations are a necessity. A master switch should be included in the wiring plan.
2. Carpeting not only absorbs noise but also gives the room an office atmosphere and is easily maintained.
3. Lavatory facilities are necessary for easy cleaning after certain jobs.
4. Adequate storage for instructional aids as well as students' supplies requires provision.
5. Office furniture in an office arrangement should be used instead of the standard "schoolroom" furniture and arrangement. (Appendix A)

In addition to the instructional facilities, the coordinator should have a private area, preferably an office, where uninterrupted small meetings can take place. A telephone with an outside line is essential.

### Equipment

Instructional equipment should be selected after careful evaluation with thought given to the following:

1. What equipment is currently used in business?

2. Can equipment be learned in a short time with little difficulty?  
(Choose equipment on which the student can expect to train for  
a reasonable amount of time.)

3. Will the equipment quickly become obsolete?

Items from the following list are appropriate for the COE classroom  
and/or office:

- Typewriters--electric, electronic, memory
- Office machines--electric, electronic calculators
- Filing cabinets with and without locks
- Duplicators--fluid, stencil, offset, electronic stencil maker
- Projectors--overhead, film, filmstrip, slide
- Stenographic laboratory
- Transcribing/dictating machines
- Tape recorder
- Phonograph
- Demonstration stand
- Stencil filing cabinet
- Mimeoscope
- Collator/jogger
- Copier--electrostatic or infrared
- Typewriting L-shaped desks and chairs
- Model secretarial desk (L-shaped) and chair
- Typewriting demonstration stand
- Assorted storage cabinets

Records must be kept for all equipment and should include location (room number), record of repairs, dates of purchase and disposal, make, serial number, cost, source of funds, and present condition. Section 104.37 of Title 45 (Federal) Rules and Regulations requires that inventories be maintained on items of equipment, each initially costing \$100 or more, in which cost the Federal Government has participated--whether with funds derived from Federal grants or State or local matching funds. Inventory records must be maintained on both the local and state levels. The local educational agency should be prepared to credit the Federal Government with its proportionate share of the value of each item of equipment at the time it is sold or ceases to be used for vocational education purposes.

A long-range plan for equipment purchases is helpful when funds become available and must be spent in a limited time. Such a plan should include specifications, priority, prices, names and addresses of vendors, and other pertinent information.

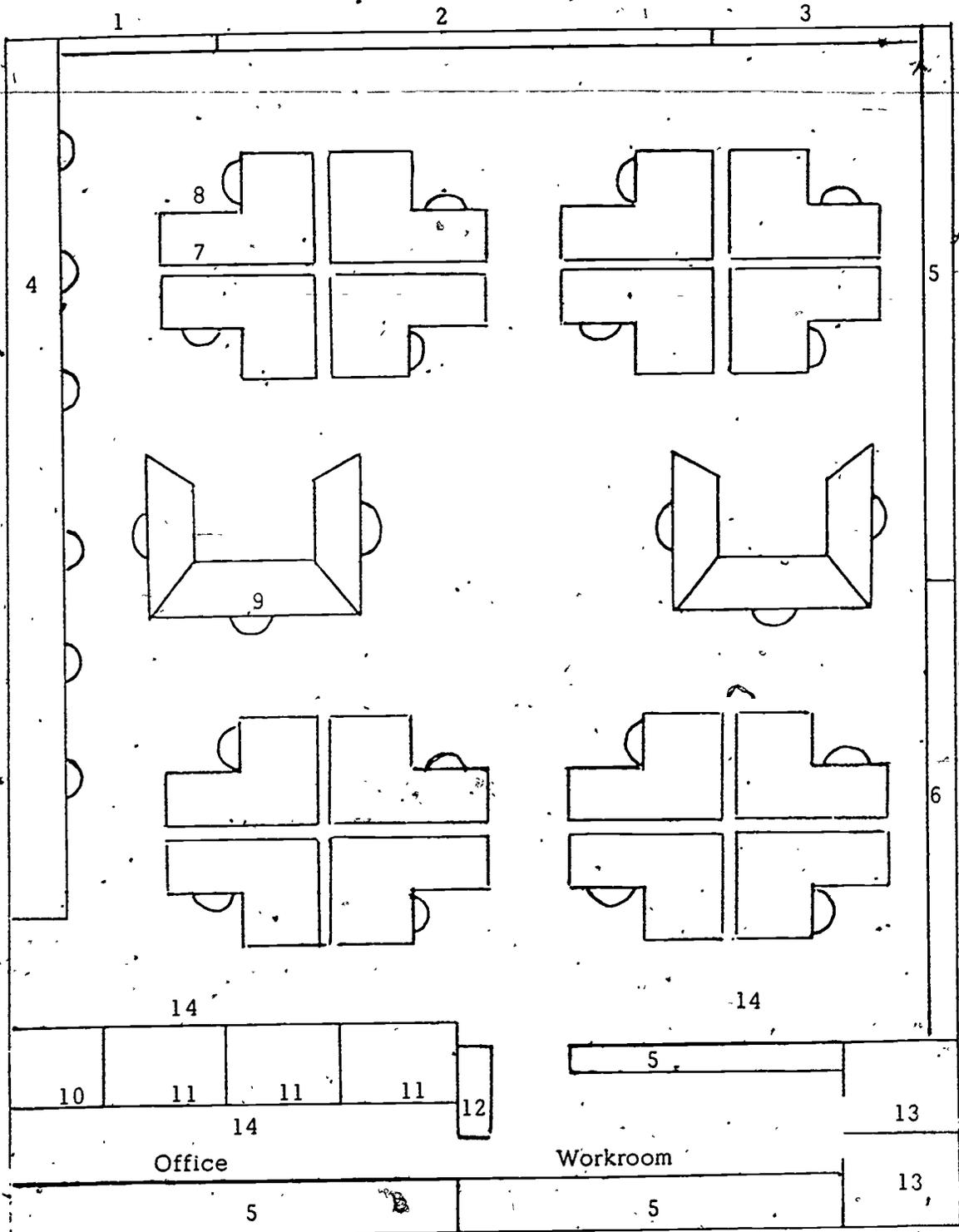
### Supplies

Amounts of available funds for supplies can vary from year to year. A "needs" list should be maintained at all times and consulted as funds become available. Supplies considered acceptable for COE include:

Stop watches	Electric pencil sharpener
Interval timers	Paper cutter
3-hole punch	Styli and lettering guides
Scissors	Tape dispensers
Staplers and removers	Instructional tapes, belts, films, wall charts
Copyholders	Miscellaneous office supplies as needed
File baskets	

The COE coordinator should also collect additional instructional materials such as supplementary textbooks, occupational handbooks, occupational guidance materials, trade journals, and miscellaneous job related information.

MODEL ROOM LAYOUT



- |                     |                      |                    |
|---------------------|----------------------|--------------------|
| 1. Tackboard        | 6. Storage Cabinet   | 11. Filing Cabinet |
| 2. Chalkboard       | 7. Secretarial Desk  | 12. Sink           |
| 3. Magazine Rack    | 8. Secretarial Chair | 13. Mobiles        |
| 4. Seating Counter  | 9. Trapezoidal Table | 14. Glass          |
| 5. Standing Counter | 10. Coat Rack        |                    |

REPORTS

	<u>Page</u>
PROGRAM REPORTS.	G-1
State Department of Education Reports	G-1
Parish Reports	G-1
School Reports	G-1
APPENDICES	
A. Vocational Education Personnel	G-2
B. Class Enrollment Report	G-4
C. End of Year Report	G-6
D. Mileage Report	G-8

## PROGRAM REPORTS

The COE teacher-coordinator will be required to submit various reports during the year. Organized management of records to assist the coordinator in completing these reports is essential. Reports will be directed to different agencies including the State Department of Education, parish school boards, and local school administrators.

### State Department of Education Reports

- September VE-104A - Vocational Education Personnel (must include "Program of Work" for extended programs)  
(Appendix A)
- BE-6602 - COE Class Enrollment (must concur with succeeding reports relating to COE students)  
(Appendix B)
- May BE-6603 - COE End of Year Report (Appendix C)

Others may be added as required by the United States Department of Education.

### Parish Reports

A copy of all "state" reports should be sent to the parish vocational supervisor. Parishes may require other reports for in-parish use.

Coordinators will need to keep personal records of travel so they can submit accurate accounts of mileage for reimbursement. (Appendix D)

Parishes set their own rates for travel reimbursements.

### School Reports

Local school administrators may require additional reports. The coordinator can also use his/her own initiative in keeping the administration informed about the program.

Date Submitted \_\_\_\_\_

\_\_\_\_\_  
Fiscal Year

\_\_\_\_\_  
Local Educational Agency

\_\_\_\_\_  
Name of School

\_\_\_\_\_  
Name of Instructor

\_\_\_\_\_  
Degree Held

\_\_\_\_\_  
Agriculture

\_\_\_\_\_  
Business Education

\_\_\_\_\_  
Distributive Education

\_\_\_\_\_  
General Cooperative Education

\_\_\_\_\_  
Health Occupations

\_\_\_\_\_  
Home Economics - Consumer

\_\_\_\_\_  
Home Economics - Wage Earning

\_\_\_\_\_  
Industrial Arts

\_\_\_\_\_  
Trade and Industrial

\_\_\_\_\_  
Vocational Guidance

\_\_\_\_\_  
Years of Experience

\_\_\_\_\_  
Total 9-Month Salary (Exclude All Supplements)

\_\_\_\_\_  
Years in Present Voc-Ed Program

**I. TEACHING SCHEDULE OF VOCATIONAL INSTRUCTOR**

Class Period	Subject Taught *See Note	Length of Period (Minutes)	ENROLLMENT			No. of Weeks Each Student is Enrolled in the Program
			Total	D	H	
1st						
2nd						
3rd						
4th						
5th						
6th						
7th						

\*NOTE: Show all Conference and Planning Periods. Indicate first and second semester courses when applicable. Under Enrollment, "D" is Disadvantaged and "H" is Handicapped.

**II. EXTENDED EMPLOYMENT**

Application is hereby made for federal and/or state reimbursement for salary of person named in this application. Before extended employment can be approved, the reverse side of this form must be completed.

\_\_\_\_ Month(s) Check appropriate month(s): \_\_\_\_ July, \_\_\_\_ August, \_\_\_\_ June

**III. TO BE FILLED IN BY LOUISIANA STATE DEPARTMENT OF EDUCATION**

1. Certified: \_\_\_\_\_ 2. Experience: \_\_\_\_\_

Salary Matching Funds \_\_\_\_\_ X \$ \_\_\_\_\_ = \$ \_\_\_\_\_  
Pro Rata Time 9-Month Salary

Extended employment approved for \_\_\_\_\_ months at \$ \_\_\_\_\_ = \$ \_\_\_\_\_

State retirement approved for \_\_\_\_\_ months at \$ \_\_\_\_\_ = \$ \_\_\_\_\_

RECOMMENDED BY: \_\_\_\_\_

DATE: \_\_\_\_\_



IV. EXTENDED EMPLOYMENT INFORMATION:

Subject Taught: \_\_\_\_\_ Estimated Enrollment: \_\_\_\_\_

Teacher Name: \_\_\_\_\_ Teacher Aide Name: \_\_\_\_\_

Funding source for extended employment for this program:

_____ : 120 Funds - Basic Grant	_____ : 150 Funds - Consumer Homemaking
_____ : Disadvantaged Set-Aside	_____ : 120 Funds - Cooperative Education
_____ : Handicapped Set-Aside	_____ : Agriculture State Funds
_____ : 130 Funds - Vocational Guidance	_____ : On-Going State Funds
_____ : 140 Funds - Special Programs for	_____ : Other:
_____ Disadvantaged Students	

Time Schedule: Daily Schedule \_\_\_\_\_ Number of Weeks: \_\_\_\_\_

Days per week: \_\_\_\_\_ Dates of Extended Employment: \_\_\_\_\_

Hours of Actual Instruction per Day: \_\_\_\_\_

V. PROGRAM DESCRIPTION: (Must include justification based on students needs, instructional objectives, and content outline. Attach additional sheet if necessary).

APPENDIX B  
COOPERATIVE OFFICE EDUCATION  
STATE DEPARTMENT OF EDUCATION  
VOCATIONAL BUSINESS EDUCATION

CLASS ENROLLMENT REPORT

School \_\_\_\_\_ City \_\_\_\_\_ Parish \_\_\_\_\_

Date Class Started \_\_\_\_\_ 19 \_\_\_\_\_ Coordinator \_\_\_\_\_

Please fill in summary on reverse side.

Student	Job Objective*	Where Employed and Job Title	Date of Employment
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			

\*PLEASE use the CIP CODE number listed on the reverse side of this form when giving the job objective.

Enrollment: Male \_\_\_\_\_ Female \_\_\_\_\_

Total: \_\_\_\_\_

Signed: \_\_\_\_\_  
Coordinator

Approved: \_\_\_\_\_  
Principal

Approved: \_\_\_\_\_  
Parish Supervisor

Student	Job Objective*	Where Employed and Job Title	Date of Employment
16.			
17.			
18.			
19.			
20.			
21.			
22.			
23.			
24.			
25.			
26.			
27.			
28.			
29.			
30.			

\*PLEASE use the CIP code number listed below when giving the job objective.

CIP CODES AND TITLES TO DEFINE JOB OBJECTIVES

CIP Code    Title

- 07.01- Accounting, Bookkeeping, and Related Programs
- 07.02 Banking and Related Financial Programs
- 07.03 Business Data Processing and Related Programs
- 07.06 Secretarial and Related Programs
- 07.07 Typing, General Office and Related Programs

CIP CODE	Summary		TOTAL
	BOYS	GIRLS	
07.01			
07.02			
07.03			
07.06			
07.07			
GRAND TOTAL			

BE-6603 (Rev. 10/82)

APPENDIX C  
 STATE DEPARTMENT OF EDUCATION  
 VOCATIONAL BUSINESS EDUCATION  
 BATON ROUGE, LOUISIANA

Date \_\_\_\_\_

COOPERATIVE OFFICE EDUCATION STUDENTS  
 END OF YEAR REPORT -

Please fill in this form in duplicate for each cooperative office education class and send the original to the State Office by \_\_\_\_\_

SCHOOL	CITY		PARISH		Wages Per Hour	Total Yearly Earnings
	Name of Student	SEX M   F	Where Employed & Job Title During School Year	Job Classification (Use CIP codes listed on next sheet)		
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

Number of Employers Participating \_\_\_\_\_

SIGNED \_\_\_\_\_

Number of Students M \_\_\_\_\_ F \_\_\_\_\_

Coordinator

Name of Student	SEX		Where Employed & Job Title During School Year	Job Classification (Use CIP codes listed in this sheet)	Wages Per. Hour	Total Yearly Earnings
	M	F				
11.						
12.						
13.						
14.						
15.						
16.						
17.						
18.						
19.						
20.						
21.						
22.						
23.						
24.						
25.						

G-7

## CIP CODES TO BE USED IN JOB CLASSIFICATION COLUMN

- 07.01 Accounting, Bookkeeping, and Related Programs
- 07.02 Banking and Related Financial Programs
- 07.03 Business Data Processing and Related Programs
- 07.06 Secretarial and Related Programs
- 07.07 Typing, General Office, and Related Programs

136

135



STUDENT ORGANIZATIONS

FUTURE BUSINESS LEADERS OF AMERICA  
COE CLUB

Page

H-1

H-2

H-1

139

## FUTURE BUSINESS LEADERS OF AMERICA

Future Business Leaders of America is a secondary organization for students who are interested in business and office occupations. The program of instruction develops leadership competencies through business education courses.

Cooperative Office Education students are encouraged to join and participate in FBLA activities. COE students can be valuable members to FBLA because of their unique on-the-job training opportunities. Two FBLA competitive events are especially designed for and limited to COE students. Both events can be successfully integrated with regular COE classroom instruction. The first event, Job Description Manual, is designed to test the student's ability to prepare a comprehensive job description manual. The manual must relate to a specific job or work station held by the contestant. Manuals are submitted to the state office for judging prior to the state conference. The first place manual is submitted to National as Louisiana's entry.

The second competitive event is Job Interview and is designed to acquaint students with employment procedures they will face when applying for positions. Louisiana guidelines restrict contestants to those students enrolled in a cooperative education program. Contestants prepare resumes and letters of application prior to attending simulated job interviews. Contestants compete at the district and state levels with the state winner becoming eligible to compete in national competition.

Information about this organization can be obtained from the following:

### State

Mrs. Connie G. Buck  
Executive Secretary, FBLA  
P. O. Box 44064  
Baton Rouge, LA 70804

### National

Future Business Leaders of America/  
Phi Beta Lambda - FBLA/PBL  
Executive Director  
Dulles International Airport  
Post Office Box 17417  
Washington, DC 20041

## COE CLUB

Leadership within the local COE program can be fostered through the election of officers. These officers can assist the coordinator in recordkeeping, fund raising, and public relations activities.

Club activities can be as limited or extensive as the coordinator and student members decide.

SUPPLEMENTARY

	<u>Page</u>
GLOSSARY	I-1
MINIMUM STANDARDS	I-5
STATE DEPARTMENT OF EDUCATION PERSONNEL	I-10
STATE DIRECTORY OF COORDINATORS	I-11

## GLOSSARY

**Advisory Committee** - A group of persons, usually outside the educational profession, selected for the purpose of offering advice and counsel to the school regarding the vocational education program. Members are representatives of the people who are interested in the activities with which the vocational program is concerned.

**Agriculture Education** - The study of farming, other scientific agricultural occupations, or any occupation involving knowledge and skills in agricultural subjects.

**Agriculture Occupations** - Those occupations involving knowledge and skills in agricultural subjects which include the functions of producing, processing, and distributing agricultural products, and services related thereto.

**Business Education** - A summary of groups of instructional programs that prepare individuals for a variety of activities in planning, organizing, directing, and controlling all business office systems and procedures. Includes instruction in preparing, transcribing, systematizing, and preserving written communications and records; preparing and analyzing money; gathering, processing and distributing information and mail; operating office machines and electronic data processing equipment; storing, distributing, and accounting for inventories of materials; operating telephone switchboards and delivering messages; and performing other business office duties.

Occupational programs included are:

1. **Accounting, Bookkeeping, and Related Programs** - A group of instructional programs that prepare individuals to systematize information about transactions and activities into accounts and quantitative records, verify accuracy of data by applying auditing principles, prepare budgets and financial reports, operate bookkeeping machines, and pay and receive money.
2. **Banking and Related Financial Programs** - A group of instructional programs that prepare individuals to perform financial or banking services. Includes instruction in credit collection, transit routing of notes and drafts, receiving and paying out money, and functions associated with processing loans and insurance claims.
3. **Business Data Processing and Related Programs** - A group of instructional programs that prepare individuals to analyze and design data processing system configurations; write, test, monitor, debug, and maintain data processing programs; and operate computers and peripheral and data-entry equipment.

4. Secretarial and Related Programs -- A group of instructional programs that prepare individuals to record and transcribe communications and to provide administrative support.
5. Typing, General Office, and Related Programs - A group of instructional programs that prepare individuals to record, duplicate, and retrieve data--including classifying, sorting, and filing correspondence, records, and other data. Includes instructions in shipping and receiving procedures, stock and inventory maintenance, and operation of office machines.

Career Objective - A student's statement of an occupational goal.

Community Survey - A survey administered to businesses and industries in the local community to determine the need for training as well as potential work stations.

Competency - A specific knowledge or skill essential to the performance of a job responsibility, normally stated with a level or standard.

Cooperative Plan - An organizational pattern for preparatory instruction which involves regularly scheduled part-time employment that gives students an opportunity to experience theory in practice while developing and refining their occupational competencies through supervised learning experiences at training stations.

Cooperative Vocational Education - A cooperative program of vocational education for persons who, through a cooperative arrangement between the school and employers, receive instruction in required academic courses and related vocational instruction by the alternation of study in school with a job in any occupational field. These two experiences must be planned and supervised by the school and employers so that each contributes to the student's education and to his employability. Work periods and school attendance may be on alternate half days, full days, weeks, or other periods of time in fulfilling the cooperative vocational education program.

Coordination - The process of integrating into a harmonious relationship the administrative, organizational, and instructional activities of the vocational program and directing them toward a common purpose.

Disadvantaged Persons - Individuals who have academic, socio-economic, cultural, or other handicaps that prevent them from succeeding in regular occupational education. Includes persons whose needs for specially designed programs result from poverty, neglect, delinquency, or cultural or linguistic isolation from the community at large. The term does not include physically or mentally handicapped persons unless such persons also suffer from these disadvantages.

**Employability Skills** - Skills and knowledge that enable one to obtain and hold a job.

**Evaluation** - A continuous process which includes four types of evaluation for the cooperative program: student, training station, program, and follow-up.

**Gainful Employment** - Employment in a recognized, new, or emerging occupation for which persons normally receive a wage, salary, or fee.

**General Cooperative Education** - A cooperative program of vocational education in which students are given supervised work experience in any one of a variety of occupations, combined with related classroom instruction. This type of program is suited especially to communities where the need for workers is too limited to justify separate courses for each occupation.

**Handicapped Persons** - Mentally retarded, hard of hearing, deaf, speech impaired, visually handicapped, seriously emotionally disturbed, crippled, or other health impaired persons who, by reason of their handicapping condition, cannot succeed in a vocational program and require special educational assistance or a modified vocational program.

**Hazardous Occupations** - Any and all of those occupations which the United States Department of Labor has ruled are too dangerous for workers under 18 years of age. This ruling makes such employment illegal and subjects employers to severe penalties in the event of violations--only affects businesses engaged in interstate commerce.

**Health Education** - An instructional program which prepares persons for occupations that render health services directly to patients to provide planned instructional experience in appropriate clinical situations.

**Health Occupations** - Those occupations which provide diagnostic, therapeutic, preventive, restorative, and rehabilitative services to people.

**Home Economics Education** - Education for homemaking which prepares for proficiency in carrying out responsibilities of home and family life and provides the basic knowledge and skills for occupational fields.

**Individualized Instruction** - Instruction planned to fit the needs and abilities of the individual in relation to his/her career objective--may vary in content and timing for the instruction of each individual.

**Industrial Education** - A program of instruction designed to develop manipulative skills, safety judgments, trade ethics, leadership abilities, technical knowledge, and related occupational information.

**Job Supervisor** - The person on the job is directly responsible for supervising and training the student-trainee. (Also called Training Sponsor)

**Local Plan** - A statement by a local school system about its program, facilities and equipment, personnel, advisory committee, and other elements in the vocational education area.

**Marketing and Distributive Education** - A program of instruction in the field of distribution and marketing designed to prepare individuals to enter, to progress, or to improve competencies in distributive occupations. Emphasis is on the development of attitudes, skills, and understanding related to marketing, merchandising, and management.

**Marketing and Distributive Occupations** - Occupations including proprietors, managers, or employees engaged primarily in marketing or merchandising goods or services. These occupations are commonly found in various business establishments such as retailing, wholesaling, manufacturing, storing, transporting, financing, and risk bearing.

**Occupational Survey** - A written survey of area businesses to determine the need for training, labor supply and turnover, and job standards.

**On-The-Job Training** - The work experience phase of the cooperative program referring to the process of learning skills in a job setting rather than a classroom.

**Program Evaluation** - An evaluation done by the teacher-coordinator and administration of the local school as well as the State Department of Education to determine the effectiveness of the cooperative program and other vocational programs.

**Related Cooperative Instruction** - Instruction designed to develop occupational skills, technical and occupational knowledges, and employability skills conducted in the classroom laboratory or similar teaching/learning environment.

**State Plan** - A written proposal by the State Department of Education and submitted to the U. S. Commissioner of Education in accordance with the 1963 Vocational Education Act and its subsequent amendments. The proposal includes rules, regulations, financial information for the state's vocational education, immediate and future plans, and a description of educational professional development.

**Student-Trainee** - A student enrolled in the cooperative vocational program receiving on-the-job training.

Training Agreement - Form prepared by the teacher-coordinator indicating the period of training, hours of work, salary, and other pertinent facts and information necessary to assure basic understanding of the student's position as a student-learner in the cooperative education program.

Training Memorandum (Plan) - Written plan of experiences indicating what is to be learned by a specific student and whether it is to be taught in the classroom (group or individual instruction) or at the training station, or both. The plan is derived from a realistic analysis of the tasks, duties, responsibilities and occupational objectives of the student-learner. A copy for each student-trainee must be on file at his/her training station to meet the requirements of the Louisiana Department of Labor.

Training Sponsor - Individual at the training station who is directly responsible for the student-learner's activities on the job. Training sponsor can be the owner or manager of the business or an employee appointed by management.

Training Station - Business where the student receives supervised learning experiences related to his/her occupational objective through part-time employment while enrolled in a cooperative vocational program.

\*Work Experience - Employment undertaken by a student while attending school.

Work Experience Education - Employment undertaken as part of the requirements of a school and designed to provide planned experiences in a chosen occupation. Supervision is provided by a teacher-coordinator and the employer.

Work Permit - An employment certificate issued to minors under 18 years of age after employer has completed an "Intention to Employ" form. Work permits are no longer required for cooperative program students. A copy of the Cooperative Part-time Training Memorandum (Plan) must be kept on file by the employer to meet requirements of the Louisiana Department of Labor.

\*Also known as on-the-job training.

147

MINIMUM STANDARDS

To be included when approved by State Board of Elementary and Secondary Education.

I-6

148

STATE DEPARTMENT OF EDUCATION PERSONNEL

J. Kelly Nix  
State Superintendent of Public Education

N. J. Stafford, Jr., Ed.D.  
Assistant Superintendent for Vocational Education

Huland D. Miley, Jr., Section Chief, Business Education

Connie G. Buck, Supervisor and FBLA Executive Secretary

Mervin Birdwell, Supervisor and PBL Executive Secretary

ADDRESS:

Louisiana Department of Education  
P. O. Box 44064  
Baton Rouge, LA 70804

STATE DIRECTORY OF COORDINATORS

To be included when information is available.

## THE EVALUATION PROCESS

	<u>Page</u>
EVALUATION OF THE STUDENT	J-1
Classroom Evaluation	J-1
Training Station Evaluation	J-1
EVALUATION OF THE TRAINING STATION	J-1
EVALUATION OF THE COE PROGRAM	J-2
APPENDICES	
A. Student Work Report Form	J-3
B. Student Attendance and Work Report Form	J-4
C. Report Card to be Completed by Training Supervisor	J-5
C-1. Report Card to be Completed by Training Supervisor	J-7
D. Student Evaluation Form	J-9
E. Evaluation of Training Station by Student	J-10
F. Evaluation of Training Station by Teacher-Coordinator	J-11
F-1. Evaluation of Training Station by Teacher-Coordinator	J-12
G. Evaluation of COE Program by Employer	J-13
H. Evaluation of COE Program by Student	J-14

## EVALUATION OF THE STUDENT

The progress of the Cooperative Office Education student must be evaluated both in the classroom and on the job. The method used for determining the final grade for a specific reporting period must be tailored to the individual school program.

### Classroom Evaluation

The evaluation of the classroom work for a given grade reporting period will be determined by the teacher-coordinator.

### Training Station Evaluation

Just as a student's classroom progress cannot be based on a single criterion, the student's progress on the job must be measured through continuous evaluation and periodic written evaluations. Continuous evaluation of the student's progress on the job is accomplished through observations made by the teacher-coordinator during coordination visits, and through responses by the student on some type of work report form (see Appendices A and B). In addition, periodic written evaluations must be made in conjunction with the grade reporting period. The periodic evaluation form (see Appendices C, C-1, and D) should be completed by the training station supervisor and submitted to the teacher-coordinator prior to the end of the grading period. It is recommended that the teacher-coordinator review the periodic evaluation form with the training station supervisor prior to the completion of the initial evaluation. If feasible, the teacher-coordinator and the training station supervisor should review the completed evaluations prior to the assigning of the final grade for the grading period. The teacher-coordinator in turn has a responsibility to use the information from the evaluation when counseling with the student.

## EVALUATION OF THE TRAINING STATION

In reviewing the effectiveness of the on-the-job experience for the COE student, the teacher-coordinator may want to include some type of evaluation of the training station. Appendix E is an illustration of an evaluation which might be completed by the student. Appendices F and F-1 illustrate an evaluation to be completed by the teacher-coordinator. If such evaluations are used, the form should be adapted to the needs of the individual COE program. Care should always be taken to maintain the professionalism of the evaluation; the evaluation form should be aimed toward evaluating the effectiveness of the training station, not the personality of the supervisor.

## EVALUATION OF THE COE PROGRAM

In addition to a self-evaluation of the COE program, the teacher-coordinator should solicit input from the training stations and the students in evaluating the effectiveness of the COE program. The evaluation instrument used should be designed to provide useful information for improving the program. Care should be exercised to be sure the evaluation does not become an ego-trip for the teacher-coordinator nor an exercise in vindictiveness by the student. Appendix G is an illustration of an evaluation which might be completed by the training station supervisor; Appendix H, by students.

153

J-2

Example of Student Work Report Form

STUDENT WORK REPORT

Name \_\_\_\_\_ Date \_\_\_\_\_

Training Station \_\_\_\_\_

Name of Immediate Supervisor \_\_\_\_\_

Days Worked Per Week \_\_\_\_\_ Hours Worked Per Day \_\_\_\_\_

Wages Paid Per Hour \_\_\_\_\_

Duties Performed \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Machines Used \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Task I Enjoy Most \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Task I Enjoy Least \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

I Need Help With \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

APPENDIX B

Example of Student Attendance and Work Report Form

ATTENDANCE AND WORK REPORT

Name \_\_\_\_\_ Dates: \_\_\_\_\_ From \_\_\_\_\_ To \_\_\_\_\_

Training Station \_\_\_\_\_ Supervisor \_\_\_\_\_

	M	T	W	T	F	S/S	M	T	W	T	F	S/S
Scheduled Working Time FROM:												
TO:												
List routine tasks:												
List new tasks:												
Total Hours Worked Daily												

Total Hours Worked This Period \_\_\_\_\_ Rate of Pay Per Hour \_\_\_\_\_

Gross Amount Earned for Period \_\_\_\_\_

Describe some event that occurred this period that made you feel good. \_\_\_\_\_

\_\_\_\_\_

Describe some event with which you had a problem. \_\_\_\_\_

\_\_\_\_\_



EAST BATON ROUGE PARISH  
 COOPERATIVE OFFICE EDUCATION  
 ON-THE-JOB EVALUATION

SUPERVISOR'S SIGNATURE

1st Nine Weeks \_\_\_\_\_

2nd Nine Weeks \_\_\_\_\_

3rd Nine Weeks \_\_\_\_\_

4th Nine Weeks \_\_\_\_\_

COMMENTS

J-5

1st Nine Weeks \_\_\_\_\_

2nd Nine Weeks \_\_\_\_\_

3rd Nine Weeks \_\_\_\_\_

4th Nine Weeks \_\_\_\_\_



STUDENT'S NAME \_\_\_\_\_

TRAINING STATION \_\_\_\_\_

Teacher-Coordinator

School

Address

Example of Report Card to be Completed by Training Station Supervisor

APPENDIX C



**COMMENTS**

1st 9 weeks .....

2nd 9 weeks .....

3rd 9 weeks .....

3-7  
4th 9 weeks .....

**SUPERVISOR'S SIGNATURE**

1st 9 weeks .....

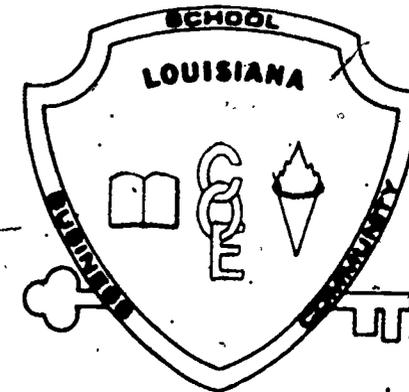
2nd 9 weeks .....

3rd 9 weeks .....

9 weeks .....



**COOPERATIVE OFFICE EDUCATION PROGRAM  
ON-THE-JOB TRAINING  
EVALUATION**



Student's Name .....

Training Station .....

**H. L. Bourgeois High School**

route 1, Box 242  
Gray, Louisiana  
872-3277

**Luther Fletcher**  
Principal

**Donald Johnson**  
Assistant Principal

**16 Frank Kidd**  
Assistant Principal

Example of Report Card to be Completed by Training Station Supervisor  
APPENDIX C-1



Example of Student Evaluation Form  
STUDENT EVALUATION FORM

STUDENT \_\_\_\_\_ SCHOOL \_\_\_\_\_

FIRM \_\_\_\_\_ COORDINATOR \_\_\_\_\_

Careful analysis of the character, personality, and work habits of all students is extremely valuable to the employer, the coordinator, and the student. This rating chart sets up eight simple but important classifications that will give a clearer picture of the student's merit and future potential.

Please check one in each category:

1. QUANTITY

- a. Production high
- b. Production average
- c. Production sometimes below average
- d. Production consistently below average

2. QUALITY

- a. Is extremely careful and thorough
- b. Quality is better than average
- c. Is satisfactorily correct and thorough
- d. Gives adequate attention

3. ATTITUDE TOWARD WORK

- a. Is exceptionally cooperative and willing
- b. Is enthusiastic and interested
- c. Shows little interest
- d. Is indifferent and/or critical

4. KNOWLEDGE OF JOB

- a. Sufficient understanding of his own and related work
- b. Understands obvious and routine aspects of job
- c. Improving and increasing understanding of job
- d. Slow to understand variation from routine assignments

5. GROOMING

- a. Always businesslike in personal appearance
- b. Usually clean, neat, and appropriately dressed
- c. Unbusinesslike in personal appearance
- d. Occasionally offensive

6. DEPENDABILITY AND INITIATIVE

- a. Looks for and takes on additional tasks
- b. Requires only normal supervision
- c. Requires close supervision
- d. Cannot be left to work alone

7. RELATIONS WITH OTHERS

- a. Always works well with others
- b. Works well with most fellow workers
- c. Works well with some co-workers
- d. Has friction with fellow workers

8. EMOTIONAL STABILITY

- a. Always self-controlled, receptive to criticism
- b. Seldom upset by pressures or reverses
- c. Easily offended; resents criticism
- d. Worries to excess over real or imagined problems

9. What are the outstanding good points, if any, of this employee? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

10. What are the important weak points, if any, of this employee? \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Date \_\_\_\_\_

Supervisor \_\_\_\_\_

APPENDIX E

Example of Form for Evaluation of Training Station by Student

STUDENT EVALUATION OF TRAINING STATION

Date \_\_\_\_\_

Student's Name \_\_\_\_\_

Training Station \_\_\_\_\_

Supervisor's Name \_\_\_\_\_

Present duties \_\_\_\_\_

Beginning Date \_\_\_\_\_ Termination Date \_\_\_\_\_

Yes No 1. Did you receive appropriate orientation when you started the job?

Yes No 2. Were the rules and regulations of the training station explained?

Yes No 3. Are you under daily supervision?

Yes No 4. Are you given adequate assistance when you need it?

Yes No 5. Are your fellow employees friendly and courteous?

Yes No 6. Do you feel advancement is available to you if you are working full time?

Rate your supervisor on the following points:

Good Average Poor 1. Introduced you to other employees in department.

Good Average Poor 2. Explained changes which affected you.

Good Average Poor 3. Showed an interest in you and your job.

Good Average Poor 4. Counseled with you as needed regarding problems.

What did you like best about your job? \_\_\_\_\_

Suggestions for improving working conditions: \_\_\_\_\_

APPENDIX F

Example of Form for Evaluating Training Station by Teacher-Coordinator

TEACHER EVALUATION OF  
TRAINING STATION

E = excellent  
S = satisfactory  
U = unsatisfactory

- E S U 1. Location of training station in relation to campus.
- E S U 2. Beginning wage.
- E S U 3. Observation of child labor laws.
- E S U 4. Participation in preparation of student's training plan.
- E S U 5. Employee morale.
- E S U 6. Equipment and facilities.
- E S U 7. Appropriateness of instruction.
- E S U 8. Variety of learning experiences.
- E S U 9. Cooperation with coordinator.
- E S U 10. Timely preparation of written student evaluation.
- E S U 11. Opportunity for advancement.
- E S U 12. Opportunity for full-time employment.

J-11

## Example of Checklist for Evaluating Student Training Station by Teacher-Coordinator

## CHECKLIST FOR EVALUATING STUDENT TRAINING STATIONS

Do you find that the station

- is located so that transportation to and from home and school is not too time-consuming or costly.
- has satisfactory employee morale.
- has equipment and facilities which are adequate, reasonably modern and in good condition.
- provides a physical and moral environment which is safe and beneficial for the student.
- observes Federal and State laws and employment regulations.

Do you find that the training station is willing to

- provide instruction, not merely obtain part-time employees.
- provide a wide variety of learning experiences compatible with individual needs and capabilities.
- develop jointly with the coordinator a training plan.
- work closely with the student and the coordinator to improve instruction.
- make instructional materials available to the student and the coordinator.
- designate supervisory personnel who will direct the student training competently and with enthusiasm.
- confer periodically with the COE coordinator and evaluate the student in writing.
- provide employment which meets or relates to career interest of the student.
- employ the student for at least 15 hours per week for the entire school year and establish a reasonable working schedule for the student.
- discuss opportunities for advancement and full-time employment.
- provide a beginning wage comparable to other part-time workers doing the same work.

APPENDIX G

Example of Form for Evaluation of the COE Program by the Employer  
EMPLOYER EVALUATION OF THE  
COOPERATIVE OFFICE EDUCATION PROGRAM

Date \_\_\_\_\_

Training Station \_\_\_\_\_

- Yes No 1. Do you feel the classroom instruction was coordinated with the student's work experience?
- Yes No 2. Was the coordinator's supervision of the working student adequate and helpful?
- Yes No 3. Do you feel the student's skills and abilities were appropriately considered in placing him/her at this training station?
- Yes No 4. Did the coordinator analyze the job duties to determine appropriate classroom instruction?
- Yes No 5. Did the student have or develop appropriate work habits for the training station position?
- Yes No 6. Was there a noticeable difference between the COE student and any other high school student who might be hired?
- Yes No 7. Did the coordinator visit the training station often enough?  
If "no," please explain \_\_\_\_\_  
\_\_\_\_\_
- Yes No 8. Did the coordinator visit the training station at appropriate times?  
If "no," please explain \_\_\_\_\_  
\_\_\_\_\_
- Yes No 9. Do you think the Cooperative Office Education program should be continued?

Please make any comments or suggestions for the improvement of the COE program.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPENDIX H

Example of Form for Evaluation of the COE Program by Student

STUDENT EVALUATION OF THE  
COOPERATIVE OFFICE EDUCATION PROGRAM

Date \_\_\_\_\_

Yes No 1. Do you feel that you have benefited from the classroom instruction you received in COE?

Yes No 2. Do you feel that you have benefited from the work experience you received through your participation in COE?

Yes No 3. Did your classroom instruction relate directly to your training station duties?

Yes No 4. Would you recommend the inclusion of any additional units in the classroom instruction phase of COE?

If "yes," please explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Yes No 5. Would you recommend the exclusion of any units from the classroom instruction phase?

If "yes," please explain \_\_\_\_\_  
\_\_\_\_\_

Yes No 6. Do you have any suggestions to improve the order of the units presented in the classroom instruction phase?

If "yes," please explain \_\_\_\_\_  
\_\_\_\_\_

Yes No 7. Could the work experience phase be improved?

If "yes," please explain \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Yes No 8. Do you feel that your classroom and work experiences will help you as you seek full-time employment?

Yes No 9. Do you feel that you have more self-confidence as a result of your experiences in COE?

UNITS OF INSTRUCTION

I-1.

170

## UNITS OF INSTRUCTION

The following units are suggested topics that might be included in the COE classroom instruction. The order in which the topics will be covered will vary depending upon the needs of the students and the business community.

### RECOMMENDED FOR ALL STUDENTS

Orientation to COE

Telephone Techniques

Word Processing Concepts and Hands-on Experience

Human Relations Skills

Securing and Keeping a Job

### RECOMMENDED FOR INDIVIDUALIZED INSTRUCTION

Communication Skills.

Financial Records

Business Math/Machines

Typing Review

Shorthand Review

Office Procedures Review

Specialized Office Problems

Insurance Office

Legal Office

Medical Office

Banking

171

## UNIT I

### COOPERATIVE OFFICE EDUCATION ORIENTATION

#### INTRODUCTION

Cooperative Office Education is a vocational business education program for high school seniors who plan a career in secretarial work. This program is designed to affect the transition from student to employee through a combination of classroom instruction and actual experience in the laboratory of the business world.

The students attend school in the morning and receive on-the-job training in an office during the afternoon. Each student-trainee receives three units of credit for the successful classroom and job performance and is under the supervision of the coordinator from the school as well as the job supervisor from the training station.

#### COMPETENCIES

1. Exhibit an understanding of the Cooperative Office Education program and an awareness of the responsibilities of each of the three parties involved in the COE program--coordinator, student, and employer.
2. Exhibit a positive attitude for successful job performance.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit an understanding of the facets of the COE program.
2. Demonstrate an understanding of classroom and training station procedures.
3. Exhibit desirable personal growth.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to list at least three advantages of a COE program.
2. After reviewing the various items that are included in a COE student's personal file, students will be able to complete the file in class and maintain it throughout the school year with 100 percent accuracy.

3. After discussing the training station sponsor's role in class, students will be able to identify four major duties of the COE training station sponsor.

#### SUGGESTED INTEREST APPROACHES

1. Invite a former COE student to speak on the advantages of being a COE student.
2. Have an experienced secretary discuss advantages, disadvantages, promotions, salaries, etc., of secretaries and office workers already working in the business world.
3. Invite a personnel director to speak on the "Dos and Don'ts of an Interview."
4. Use various audio-visual materials to support orientation activities.

#### METHODOLOGY

This unit has been designed to be a flexible method of orienting new COE students to Cooperative Office Education through the use of teacher lectures, discussions, case-study groups, outside lecturers, filmstrips, and guest speakers. THIS UNIT IS DESIGNED TO BE USED IN A SUMMER ORIENTATION SITUATION.

#### UNIT OUTLINE

##### COOPERATIVE OFFICE EDUCATION

- I. Objectives of COE Program
  - A. Definition
  - B. Coordinator's responsibilities
  - C. Student's responsibilities
  - D. Employer's responsibilities
  - E. Evaluation
    1. Classroom
    2. On-the-Job
- II. Personal Growth (See Human Relations Unit)
- III. Pre-employment (See Securing and Keeping a Job Unit)

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

---

1. On a written test, students will be able to list at least three advantages of a COE program.
- 

### Subject Matter Content

Objectives of program

### Learning Activities

1. Prepare bulletin board illustrating components of COE program.
  2. Discuss in groups the responsibilities of the coordinator, students, and employers. Groups will present a summary to the class.
  3. Prepare a self-evaluation. Write a plan for self-improvement, file it in personal folder to be reviewed at the end of the school year.
- 

2. After reviewing the various items that are included in a COE student's personal file, students will be able to complete the file in class and maintain it throughout the school year with 100 percent accuracy.
- 

### Subject Matter Content

Forms

### Learning Activities

1. Discuss in groups the different types of forms.
2. Complete forms for personal folder.
3. View film on importance of personnel records.

- 
3. After discussing the training station sponsor's role in class, students will be able to identify four major duties of the COE training station sponsor.
- 

Subject Matter Content

Employer's responsibilities

Learning Activities

1. Discuss in small groups the supervisor's responsibility to a student. Present summary to class.
2. Discuss in small groups methods of student evaluation that employers will use. Present information to class.
3. Role-play common employee on-the-job infractions (Ex. excessive tardiness) and the employer's handling of such infractions.

175

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Class evaluation
- \* Class participation grade

## EQUIPMENT AND SUPPLIES

### Students

Typewriter  
Pen  
Pencil  
Notebook  
Bulletin Board Supplies  
Calculator

### Teacher

Textbooks and Manuals  
Projector  
Screen  
Films  
Typewriter  
Bulletin Board Supplies

## SUPPLEMENTARY MATERIALS

### Filmstrips with Cassettes

#### First Jobs

(9 filmstrips, 9 cassettes)  
Educational Design, Inc.  
47 W. 13th Street  
New York, NY 10011

#### Goofy Goes to Work

(6 filmstrips, 6 cassettes)  
Walt Disney Educational Media Company  
2100 Riverside Drive  
Burbank, CA 91506

#### Just a Secretary

(1 filmstrip, 1 cassette)  
Educational Activities, Inc.  
Freeport, NY 11520

#### The Look Is Natural

(1 filmstrip, 1 cassette)  
Educational Activities, Inc.  
Freeport, NY 11520

#### The Secretary in a Changing Role

(4 filmstrips, 4 cassettes)  
Educational Enrichment Materials  
(A Division of The New York Times)  
157 Chambers Street  
New York, NY 10007

### Textbooks

#### Century 21 Typewriting

2nd edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

### Transparencies

#### Personal Development Transparencies

(10 sets, each set containing 8 transparencies)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

177

Miscellaneous

Outside lecturers are supplied from the local business community--  
in particular, current training station sponsors

Question and Answer series on "Applying for a Job"

Jerry Starr  
South Terrebonne Media Center  
General Delivery  
Bourg, LA 70343

## RESOURCES

"Acting Responsibly." Human Relations Lap 5. IDECC, Inc. The Ohio State University, 1981.

Carvell, Fred J. Human Relations in Business. London: The Macmillan Company, 1970.

Chapman, Elwood N. Your Attitude Is Showing. California: Science Research Associates, Inc., 1977.

Egglund, Steven A., and John W. Williams. Human Relations in Business. Cincinnati: South Western Publishing Company, 1977.

"Positive Attitude." Human Relations LAPS 1, 5, 11. IDECC, Inc. The Ohio State University, 1981.

Weschler, Irving R. Issues in Human Relations Training. Washington: National Training Laboratories, 1962.

## UNIT II

### TELEPHONE TECHNIQUES

#### INTRODUCTION

In today's progressive world, one of the most important means of communicating in a business office is the telephone. Therefore, this unit is designed to provide for the development of proper telephone techniques.

Students will participate in activities to develop a telephone personality that will be an asset to any business.

#### COMPETENCIES

1. Exhibit good telephone techniques.
2. Develop skill and understanding in the use of the telephone directory, special services, and equipment.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of the telephone in business.
2. Develop good telephone manners.
3. Use telephone directory effectively.
4. Identify special telephone services.
5. Describe uses of special equipment.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to list at least five reasons why the telephone is important in the business office.
2. In a classroom discussion, students will be able to contribute at least one means of cultivating a good telephone voice.
3. After a classroom discussion, students will be given a list of ten incoming problem calls for which they will write an acceptable method for handling each call.

4. On a performance test, students will be able to record information from incoming calls with 100 percent accuracy.
5. On a written test, students will be able to give at least five suggestions for insuring courtesy on the phone.
6. On a written test, students will be able to apply good language skills when using word endings, adverbs, adjectives, commonly misused words, and spelling with at least 75 percent accuracy.
7. Given a list of 25 situations, students will be able to locate the phone numbers in the telephone directory in 25 minutes with at least 75 percent accuracy.
8. On a written test, using a long-distance rate table, students will be able to compute the cost of completing five telephone calls using station-to-station, direct-dial, and person-to-person rates with at least 75 percent accuracy.
9. Given a copy in class of the long-distance calls made for the previous month, students will be able to prepare an analysis of the number of calls made to each number, the length of each call, the total time for all calls made to the same number, and the total cost of all calls made with a minimum of 90 percent accuracy.
10. On a written test, students will be able to identify different types of outgoing telephone calls with at least 75 percent accuracy.
11. Given a list of twelve types of telephone equipment, students will be able to define them on a written test with at least 75 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Give a pre-test on the unit to determine students' awareness of the value of good telephone techniques.
2. Invite a representative from local telephone company, the school speech department, and/or the school secretary to speak on the many aspects of telephone technique, equipment, and service.
3. Appoint a committee to write and perform a skit entitled "Telephone Trouble" in which office employees do not cooperate in answering one another's telephone when one is away on break.
4. Use multi-media equipment--tape recorders, films, filmstrips, etc.--to emphasize good telephone technique.

## METHODOLOGY

Throughout this unit telephone techniques, equipment and services are incorporated in such a manner as to increase the efficiency of the business office. In addition, content not covered by students' activities or guest participants will be given in lecture form by the instructor. Some of the sources from which the instructor obtains lecture material are listed in the resource section of this unit.

### UNIT OUTLINE

#### TELEPHONE TECHNIQUES

##### I. Importance of Telephone in Business

- A. Increase productivity
- B. Promote human relations

##### II. Development of Good Telephone Manners

- A. Voice
- B. Speech
- C. Language skills
- D. Calls received
- E. Calls made
- F. Message taking

##### III. Effective Use of Telephone Directory

- A. Alphabetic section
- B. Classified section
- C. Introductory section
- D. Consumer information

##### IV. Effective Use of Special Services

- A. Long-distance calls
- B. Local calls

##### V. Types of Special Equipment

- A. Switchboards
- B. Special phones
- C. Automatic dialing telephones
- D. New equipment

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. On a written test, students will be able to list at least five reasons why the telephone is important in the business office.
- 

### Subject Matter Content

Importance of telephone

### Learning Activities

1. Relate personal experiences of three calls which you have made to business offices and evaluate (on the checklist) the person who answered the phone. (Appendix A)
  2. Compose and type an essay of 200 to 300 words on ways good telephone techniques can improve productivity in an office.
  3. Complete the scrambled words exercise on techniques, services, and equipment. (Appendix B)
  4. Type a list of money-saving telephone tips from introductory pages of telephone directory.
  5. Listen to the experiences of a young college graduate. Discuss in class. (Appendix C)
- 

2. In a classroom discussion, students will be able to contribute at least one means of cultivating a good telephone voice.
- 

### Subject Matter Content

Good telephone voice

### Learning Activities

1. Divide into groups of two and say aloud the list of numbers using correct pronunciation. (Appendix E)
2. Listen to five different radio announcers and make a list of both good and bad points of their voices and report to the class.

Good telephone voice

3. Draw a card from a group of sentence action cards and record on recorder. Listen and rate on a scale of one to five (with one being the highest) the qualities of good telephone voice. (Appendices F and G)

- 
3. After a classroom discussion, students will be given a list of ten incoming problem calls for which they will write an acceptable method for handling each call.
- 

Subject Matter Content

Incoming calls

Learning Activities

1. Write a script for a situation in which a customer is calling to complain that a washing machine has been broken for three days and that a repair person has not responded.
2. Divide into groups of three and role play the situations involving calls. Evaluate each other on a scale of one to five (with one being the highest). (Appendix H)
3. Relate a personal experience in which a problem call has been handled.

- 
4. On a performance test, students will be able to record information from incoming calls with 100 percent accuracy.
- 

Subject Matter Content

Incoming calls--persons not at desks

Learning Activities

1. Write incoming messages on message forms. (Appendix I)
2. Listen to presentation by guest speaker on new equipment and technology of office telephone systems and be able to indicate the effects they will have on the office.

II-5

Incoming calls--persons  
not at desks

3. Listen to recorded media and write the names which are dictated. (Appendix J)

- 
5. On a written test, students will be able to give at least five suggestions for insuring courtesy on the phone.
- 

Subject Matter Content

Learning Activities

Telephone courtesy

1. Prepare a bulletin board illustrating telephone courtesy.
2. Listen to teacher-prepared tape on "First Impressions Do Count," and write a description of the person talking. Rate the voice as to effectiveness--negative, positive, or neutral. (Appendix K)
3. Role play the situations in the guide for the teletrainer provided by the local telephone company.
4. Divide into groups and come up with ideas for telephone courtesy and report findings to class. Compile one master list.

- 
6. On a written test, students will be able to apply good language skills when using word endings, adverbs, adjectives, commonly misused words, and spelling with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Language skills

1. Type twenty sentences using words from a list of twenty misspelled words. (Appendix L)
2. Compose a one-page report on the importance of language skills in a business office.
3. Type correct answers in the blanks on the Language Skill Sheet. (Appendix M)

- 
7. Given a list of 25 situations, students will be able to locate the phone numbers in the telephone directory in 25 minutes with at least 75 percent accuracy.
- 

Subject Matter Content

Telephone directory

Learning Activities

1. Index and alphabetize a list of 25 names. (Appendix N)
  2. Locate and type 15 important numbers that you think should be kept in all office telephone reference files.
  3. Determine and compare the cost of each call on the list for both direct dial and operator-assisted calls. (Appendix O)
- 

8. On a written test using a long-distance rate table, students will be able to compute the cost of completing five telephone calls using station-to-station, direct-dial, and person-to-person rates with at least 75 percent accuracy.
- 

Subject Matter Content

Long-distance calls.

Learning Activities

1. Show filmstrip obtained from a local phone company on how to place long-distance calls.
  2. Determine the cost for each station-to-station and direct-dial call listed. (Appendix P)
  3. Write in your own words the method used for 1+ and 0+ dialing.
- 

9. Given a copy in class of the long-distance calls made for the previous month, students will be able to prepare an analysis of the number of calls made to each number, the length of each call, the total time for all calls made to the same number, and the total cost of all calls made with at least 90 percent accuracy.
-

Subject Matter Content

Learning Activities

Long-distance calls

1. Check time-zone map in telephone directory to find out what time it will be in the cities on the list. (Appendix D)
2. Type a list of directory assistance charges using introductory pages of a telephone directory.
3. Type a list of calls exempt from directory assistance charges and explain why. (Small group activity)

- 
10. On a written test, students will be able to identify different types of outgoing telephone calls with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Outgoing telephone calls

1. Prepare a bulletin board on the types of outgoing telephone calls.
2. Write the words and record the message for a happy 25th anniversary singing call.
3. Complete the word-find puzzle using the terms on the list provided. (Appendix Q)

- 
11. Given a list of twelve types of telephone equipment, students will be able to define them on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Telephone equipment

1. Complete the word-find puzzle after reviewing the equipment terms. (Reward the first one completed) (Appendix R)
2. Unscramble the words in the exercises on types of telephone equipment. (Reward the first one completed) (Appendix S)

Telephone equipment

3. Identify telephone equipment from pictures on overhead transparencies and give examples of proper uses.
4. Perform mock telephone situations using teletrainer and teacher's guide. (Have one group evaluate another group's performance.)

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Class participation grade
- \* Student project grade
- \* Rating sheet grade

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Office Manual  
Telephone Directory  
Rating Sheets  
Instruction Sheets  
Checklists  
Message Forms  
Typing Paper  
Correction Tape  
Pen  
Pencil  
Typewriter  
Calculator

### Teacher

Textbook and Manual  
Telephone Directory  
Tapes, Blank  
Tapes, Recorded  
Bulletin Board Materials  
Construction Paper  
Transparencies  
Transparency Pens  
Rating Sheets  
Filmstrip Projector/Filmstrips  
Overhead Projector  
Tape Recorder  
Teletrainer

APPENDIX A

STUDENT EVALUATION CHECKLIST

TELEPHONE CALLS--PERSONAL EXPERIENCE

EVER ordered merchandise on the phone,  
 And the voice that answered made you moan?  
 OR called for an appointment with Dr. Ledoux,  
 And the voice that greeted you was pleasant and helpful, too?  
 THEN PERSONAL EXPERIENCE has shown to you,  
 WHAT GOOD TELEPHONE TECHNIQUES CAN REALLY DO?

Directions: On the following checklist, evaluate three calls which you have made to business offices. Rate the person answering the call on the following scale: 1, excellent; 2, very good; 3, good; 4, fair; and 5, poor. Complete the chart by totaling all three columns and filling in the summary at the bottom of the page.

PART I--

RATE THE PERSON WHO ANSWERED YOUR CALL ON THESE ITEMS	CALL NO. 1	CALL NO. 2	CALL NO. 3
1. USED WELL-MODULATED VOICE			
2. USED GOOD SPEECH			
3. USED GOOD VOCABULARY			
4. WAS COURTEOUS			
5. ANSWERED PROMPTLY			
6. IDENTIFIED COMPANY			
TOTAL			

PART II--Summarize your general impression of the call that received the highest number of points.

---



---



---

APPENDIX B

TELEPHONE TECHNIQUES TERMINOLOGY

SCRAMBLED (RABDSELCM) WORDS

Directions: Rearrange the letters of the scrambled words in the correct order, and you will discover 15 telephone technique terms which are used in this unit. When you have completed all the terms, you may check the correct answers at the bottom of this page.

- |                 |     |       |
|-----------------|-----|-------|
| 1. RYUCOVBALA   | 1.  | _____ |
| 2. HOTEENLP     | 2.  | _____ |
| 3. GMSSEAE      | 3.  | _____ |
| 4. RDETYORCI    | 4.  | _____ |
| 5. TPALCIBHAEAL | 5.  | _____ |
| 6. HSIDABOWCTR  | 6.  | _____ |
| 7. EORSEKNAPHER | 7.  | _____ |
| 8. BLIOME       | 8.  | _____ |
| 9. LGDIANI      | 9.  | _____ |
| 10. FENCERCENO  | 10. | _____ |
| 11. STQCEYRU    | 11. | _____ |
| 12. CLETLOC     | 12. | _____ |
| 13. PRARETOO    | 13. | _____ |
| 14. NASTCEDI    | 14. | _____ |
| 15. GIGUNOTO    | 15. | _____ |

Answers: 1. vocabulary 2. telephone 3. messages 4. directory 5. alphabetical 6. switchboard 7. speakerphone 8. mobile 9. dialing 10. conference 11. courtesy 12. collect 13. operator 14. distance 15. outgoing

## APPENDIX C

### EXPERIENCE

Once upon a time (not too long ago) a college graduate received a diploma and immediately began looking for a teaching position. In each of the application letters sent, a resume' was always included.

One beautiful sunny day while anxiously awaiting a reply from the letters, the graduate received word that there was a job opening in one of the most desirable and highest-paying parishes in our state. Rather than take the time to send another letter, the graduate decided to call the principal and ask for an interview.

Upon calling, the graduate spoke to the secretary who, after talking to the principal, suggested that the applicant come in the next day at 10:00 a.m.

The next day dawned bright and beautiful as he/she gathered his/her letter of application and resume and drove ten miles to the interview. Of course, he/she was dressed properly and was not chewing gum or smoking.

At the school, the applicant was greeted by the secretary who immediately took him/her into the principal's office.

At the end of the interview, the principal gave a little grin and said, "This is a first for me in twenty years. I have a rule that I have always followed--never hire anyone until they've filled out an application form, and I've had sufficient time to study the letter of application and resume. Why did I do it? Because my secretary was so impressed by your voice and pleasant manner after speaking with you on the phone yesterday."

The young applicant was shocked and surprised when the principal offered him/her this wonderful teaching position. Of course, he/she accepted the job and lived happily ever after.

#### Note:

We can't guarantee that the pleasant voice will always get you the job, but I think we can safely say that it will certainly help open the door. The rest, of course, is always up to you!

APPENDIX D

TELEPHONE DIRECTORY--TIME-ZONE

Directions: In an office it is important that you know about placing calls to other cities before their offices close or after they open. This exercise is designed to give you practice. Use the introductory pages of the telephone directory to locate the map of the United States which shows the time zones. In the proper space provided on the chart, indicate the time the call will reach its destination and if it will get there before the office closes. (Assume all offices are open from 9:00 a.m. until 5:00 p.m.)

YOU ARE MAKING THE CALL FROM YOUR TOWN AT...	YOU ARE MAKING THE CALL TO	IT WILL REACH THAT TOWN AT..	BEFORE CLOSING
			YES-NO
1. 9:20 a.m.	Reno, NV		
2. 4:45 p.m.	Montgomery, AL		
3. 1:10 p.m.	Seattle, WA		
4. 11:20 a.m.	Raleigh, NC		
5. 2:00 p.m.	Miami, FL		
6. 10:00 a.m.	San Francisco, CA		
7. 12:37 p.m.	Des Moines, IA		
8. 9:15 a.m.	Salem, OR		

APPENDIX E

HOW TO PRONOUNCE NUMBERS

It is very important to enunciate numbers well when placing calls. Therefore, this exercise is designed to help you learn to pronounce the numbers correctly.

Directions: Find a partner and practice saying the numbers to each other. Time: Five minutes.

NUMBERS	SOUNDS TO USE	THEN: SAY
0	long o	oh
1	strong w and n	wun
2	strong t and long oo	too
3	strong r and long ee	th-r-ee
4	long o and strong r	fo-er
5	first i long, second i short, strong v	fi-iv
6	stron s and ks	siks
7	strong s and v, well-rounded en	sey-en
8	long a and strong t	ate
9	strong n, long i and well-rounded en	ni-en

APPENDIX F

SENTENCE ACTION CARDS

Each of the following examples will be put on card stock (3 x 5 cards) and placed in a box. Students will each draw one card out of box, read it to themselves, and record it on tape. Upon completion, students will play back tape and evaluate each other using Appendix G. (Teacher should prepare more of these cards if needed.)

SENTENCE ACTION CARD #1

"Good morning, Mrs. Mortimer:  
Is Dr. James in today?  
May I speak with him, please?"

SENTENCE ACTION CARD #2

"Thank you for calling, Mr. Jones.  
I'll be sure to give Mr. Hartman  
your message as soon as he returns."

SENTENCE ACTION CARD #3

"Mr. Owens is no longer at this  
extension. He can be reached  
in the Accounting Department,  
Extension 631. Just a moment,  
please, and I'll have the  
operator transfer your call."

SENTENCE ACTION CARD #4

It is very important when you use  
the phone that you know what you  
want to say. Remember time is  
valuable in a business office.

SENTENCE ACTION CARD #5

When taking messages on a phone,  
be sure that you always have the  
proper supplies on hand--memo  
forms, paper, and pens. Do not  
keep the caller on "hold" while  
you look for supplies.

SENTENCE ACTION CARD #6

For long distance calls some businesses  
have a "WATS" line. WATS stands for  
Wide Area Telecommunications Service.  
With WATS a business pays a fixed  
monthly charge regardless of the  
number of calls made.

SENTENCE ACTION CARD #7

"I'm sorry, she's busy with  
another customer. I called the  
service department, and they  
said that your service contract  
expired on the last day of  
July."

SENTENCE ACTION CARD #8

What should a message contain? It  
should include the name and phone  
number (extension, if applicable) of  
the caller and some brief explana-  
tion as to the reason for the call.

SENTENCE ACTION CARD #9

How a receptionist answers a  
phone depends on the place of  
employment. In a large company,  
employees answer calls by  
giving their own name or by  
saying the name of the depart-  
ment and then their name.

SENTENCE ACTION CARD #10

A receptionist should know how to  
prepare for and make a call; how to  
answer the phone; how to take  
messages; how to close a call; and  
how to handle the messages.

195



APPENDIX H  
 INCOMING CALLS--ROLE PLAYING  
 RATING SHEET

Directions: Evaluate each group on the following criteria: answered promptly, identified self, was courteous, used good speech, used well-modulated voice, used good vocabulary. Use a scale of one to five with one being the highest.

	GROUP						
	1	2	3	4	5	6	7
ANSWERED PROMPTLY							
IDENTIFIED SELF							
WAS COURTEOUS							
USED GOOD SPEECH							
USED WELL-MODULATED VOICE							
USED GOOD VOCABULARY							
TOTAL							

197

APPENDIX I

INCOMING MESSAGES--MESSAGE FORMS

Directions: The following calls came in today (use current date) while the persons called were not at their desks. Use the information given below to fill out the message forms.

CALL NO. 1---Marcus Baker called Eugene McIntyre at 10:05 a.m. asking for an interview for the position of secretary. He would like Mr. McIntyre to call him before 5:00 p.m. today to let him know about the interview--phone 972-8413.

CALL NO. 2---June Evans called Jim Carlson at 9:45 a.m. She needs some advice on a problem. She will call back at 11:15 a.m. as Jim will be out of his office until that time.

CALL NO. 3---Mary Snyder called to remind her husband, Larry, that they would be having guests (Mr. and Mrs. Davis) for dinner tonight and to be sure to pick up the flowers from the florist. Call came at 1 p.m.

-----  
TO: \_\_\_\_\_

A MESSAGE FOR YOU

From \_\_\_\_\_

of \_\_\_\_\_

Phone No. \_\_\_\_\_ Ext. \_\_\_\_\_

\_\_\_\_\_ Telephoned \_\_\_\_\_ Will call again

\_\_\_\_\_ Returned your call \_\_\_\_\_ Came to see you

\_\_\_\_\_ Please phone \_\_\_\_\_ Wants to see you

Taken by	Date	Time

APPENDIX I

ANSWER KEY

CALL NO. 1 TO: Eugene McIntyre

A MESSAGE FOR YOU

From Marcus Baker

of

Phone No. 972-8413 Ext.

Telephoned  Will call again

Returned your call  Came to see you

Please phone  Wants to see you

Interview for secretary

Call before 5:00 today

Taken by	Date	Time
A. Student	(current)	10:05 a.m.



APPENDIX I

ANSWER KEY

CALL NO. 2 TO: Jim Carlson

A MESSAGE FOR YOU

From June Evans

of \_\_\_\_\_

Phone No. \_\_\_\_\_ Ext. \_\_\_\_\_

Telephoned       Will call again

Returned your call       Came to see you

Please phone       Wants to see you

Call back at 11:15

Taken by	Date	Time
<u>A. Student</u>	<u>(current)</u>	<u>9:45 a.m.</u>

APPENDIX I

ANSWER KEY

CALL NO. 3 TO: Larry Snyder

A MESSAGE FOR YOU

From Mary Snyder

of \_\_\_\_\_

Phone No. \_\_\_\_\_ Ext. \_\_\_\_\_

Telephoned \_\_\_\_\_ Will call again

\_\_\_\_\_ Returned your call \_\_\_\_\_ Came to see you

\_\_\_\_\_ Please phone \_\_\_\_\_ Wants to see you

Mr. and Mrs. Davis coming to dinner

Pick up flowers

Taken by	Date	Time
<u>A. Student</u>	<u>(current)</u>	<u>1:00 p.m.</u>

201

APPENDIX J

NAMES--ORAL DICTATION (Spelling)

Directions: Dictate the following names either orally or have on tape.

1. Charles Culbertson
2. Henry Rodrique
3. Sam Smith
4. Dennis Yeager
5. Denise Woodward
6. Joe Griffith
7. Mary Harrison
8. Barry Neilsen
9. Johnny Oliver
10. Kenneth Powers
11. Robert Glass
12. Albert Snyder
13. R. L. Gunther
14. Amelia Perry
15. Jennifer Moxley
16. Hilda Swenson
17. Suzanne Turner
18. David Parker
19. Ellen Tompkins
20. Michael Wilson

APPENDIX K  
FIRST IMPRESSIONS DO COUNT

Directions: As you listen to the voices on the tape, form a mental picture of what this person looks like, how he/she is dressed, etc. Then write down your description of that person and rate the voice negative, positive, or neutral.

VOICE NO. 1:

Describe \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RATE: \_\_\_\_\_ NEGATIVE \_\_\_\_\_ POSITIVE \_\_\_\_\_ NEUTRAL

VOICE NO. 2:

Describe \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RATE: \_\_\_\_\_ NEGATIVE \_\_\_\_\_ POSITIVE \_\_\_\_\_ NEUTRAL

VOICE NO. 3:

Describe \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

RATE: \_\_\_\_\_ NEGATIVE \_\_\_\_\_ POSITIVE \_\_\_\_\_ NEUTRAL

APPENDIX L

LANGUAGE SKILLS--MISPELLED WORDS

Directions: The twenty words given below are misspelled. Spell each word correctly; then use it in a sentence. Watch spelling and punctuation. Use typewriters and dictionaries.

- |                      |                  |
|----------------------|------------------|
| 1. operater          | 11. automaticaly |
| 2. transferring      | 12. conferance   |
| 3. direct-diel calls | 13. techniques   |
| 4. alphebetically    | 14. distinkly    |
| 5. directery         | 15. mobil phone  |
| 6. terminateing      | 16. nonimal      |
| 7. voice inflicion   | 17. maintainence |
| 8. acurately         | 18. enunciation  |
| 9. extention         | 19. recepcionist |
| 10. unecessary       | 20. courtous     |
-

APPENDIX M  
LANGUAGE SKILL SHEET

Directions: For each of the following exercises, follow the directions:

A. ADVERBS AND ADJECTIVES--Underline the correct answer.

1. The call from California arrived (sooner, soonest) than we expected.
2. Can you dial (fast, faster) on the dial phone than you can on the Touch-Tone telephone?
3. I think this telephone is (better, best).
4. Ginger learned to use the computer (most rapidly, more rapidly) than anyone in the class.
5. John listened (most carefully, carefully) to the oral instructions for placing a long-distance call.

B. MISUSED WORDS--Underline the correct answer.

1. The FBLA'ers were (all ready, already) to leave for the district conference early this morning.
2. The package had (already, all ready) arrived by the time I arrived at the post office.
3. When the phone rang, Susie hurried (into, in to) the office to answer it.
4. Please (set, sit) the telephone directory on my desk.
5. Phone rates are expected to (rise, raise) in the near future.

C. ING ENDINGS--Add "ing" to the following words.

- |               |          |
|---------------|----------|
| 1. travel     | 1. _____ |
| 2. cancel     | 2. _____ |
| 3. proceed    | 3. _____ |
| 4. convey     | 4. _____ |
| 5. identify   | 5. _____ |
| 6. disconnect | 6. _____ |
| 7. expedite   | 7. _____ |
| 8. compute    | 8. _____ |

APPENDIX N

INDEX AND ALPHABETIZE

Directions: On 3 x 5 slips of paper index the following names and then alphabetize them.

1. Alfred A. Wheaton
2. Allen Bellizer, Jr.
3. Harbor Seafood Restaurant
4. Daniel Lightfoot
5. Andrew R. Rulf
6. Russell V. Caldwell
7. Rhonda Carstairs
8. Danny's Fried Chicken
9. John David Ratcliff, III
10. Rupert Hopkins
11. Louis A. Jacobsen
12. Frank D. Mannering
13. Walter L. Lewis
14. Joe's Boots and Work Clothes
15. Sam's Firestone Safety Center
16. James Freeman, Sr.
17. W. C. Felderman
18. Virginia Ann Valentine
19. C K Enterprise
20. L. N. Tanner
21. Walter O'Keefe
22. Beulah Ann Johnson
23. L. R. Johnston
24. Larry R. Johnsen
25. Angela Nell Standsbury

ANSWER KEY

APPENDICES L, M, AND N

APPENDIX L

- |                      |                   |
|----------------------|-------------------|
| 1. operator          | 11. automatically |
| 2. transferring      | 12. conference    |
| 3. direct-dial calls | 13. techniques    |
| 4. alphabetically    | 14. distinctly    |
| 5. directory         | 15. mobile phone  |
| 6. terminating       | 16. nominal       |
| 7. voice inflection  | 17. maintenance   |
| 8. accurately        | 18. enunciation   |
| 9. extension         | 19. receptionist  |
| 10. unnecessary      | 20. courteous     |

APPENDIX M

- |    |                            |    |                  |
|----|----------------------------|----|------------------|
| A. | 1. sooner                  | B. | 1. all ready     |
|    | 2. faster                  |    | 2. already       |
|    | 3. best                    |    | 3. into          |
|    | 4. more rapidly            |    | 4. set           |
|    | 5. carefully               |    | 5. rise          |
| C. | 1. travelling or traveling |    | 5. identifying   |
|    | 2. cancelling or canceling |    | 6. disconnecting |
|    | 3. proceeding              |    | 7. expediting    |
|    | 4. conveying               |    | 8. computing     |

APPENDIX N

- |                                     |                                   |
|-------------------------------------|-----------------------------------|
| 1. Bellzer, Allen (Jr.)             | 14. Johnston, L. R.               |
| 2. C K Enterprise                   | 15. Lewis, Walter L.              |
| 3. Caldwell, Russell J.             | 16. Lightfoot, Daniel             |
| 4. Carstairs, Rhonda                | 17. Mannering, Frank D.           |
| 5. Danny's Fried Chicken            | 18. O'Keefe, Walter               |
| 6. Felderman, W. C.                 | 19. Ratcliff, John David (III)    |
| 7. Freeman, James (Sr.)             | 20. Rulf, Andrew R.               |
| 8. Harbor Seafood Restaurant        | 21. Sam's Firestone Safety Center |
| 9. Hopkins, Rupert                  | 22. Standsbury, Angela Nell       |
| 10. Jacobsen, Louis A.              | 23. Tanner, L. N.                 |
| 11. Joe's Boots and Work<br>Clothes | 24. Valentine, Virginia Ann       |
| 12. Johnsen, Larry R.               | 25. Wheaton, Alfred A.            |
| 13. Johnson, Beulah Ann             |                                   |

APPENDIX O  
LONG-DISTANCE CALLS

Directions: Determine the cost of each of the calls given below. Use the table in the telephone-directory.

FROM YOUR CITY TO:	Day	Length of Time	Time	Dial Direct	OPERATOR	
					Station to Station	Person-to-Person
Atlanta, GA 30300	Mon.	5	9 a.m.			
Chicago, IL 60600	Wed.	5	8 p.m.			
Houston, TX 77000	Fri.	5	11:15 a.m.			
St. Louis, MO 63100	Sat.	3	6 p.m.			
Seattle, WA 98100	Sun.	3	8 a.m.			

APPENDIX P

LONG-DISTANCE CALLS

Directions: All the calls below were made on Monday through Friday between the hours of nine and five for a period of three minutes. Compute the cost of each call using information from telephone directory.

FROM YOUR CITY TO:	STATION-TO-STATION	DIRECT-DIAL
Atlantic City, NJ 08404		
Boston, MA 02100		
Detroit, MI 48200		
Philadelphia, PA 19100		
Washington, DC 20000		

209

APPENDIX Q  
WORD-FIND PUZZLE

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: Answering, automatic, bellboy, call, card dialer, collect, cordless, courtesy, direct dial, identifying, incoming, key, manner, mobile phone, operator, outgoing, PBX, service, telephone, Touch-A-Matic, time, vocabulary, voice, WATS, yellow pages, zone

C A R D D I A L E R X O P E R A T O R Y Z O  
 K E Y A B Y O B L L E B C D S S E L D R O C  
 S F D E F I G T H I N C O M I N G I C A L L  
 W J K L C D M O N A N S W E R I N G O P Q R  
 I C S T I E U U V W X M O B I L E P H O N E  
 T O Y Z T N A C B C D E E F G H S I T I M E  
 C U J K A T L H M N O C P P Q E R S T U M V  
 H R E W M I X A Y Z I A B B G C D E F G A H  
 B T N I O F J M K O L M X A O P E Q R S N T  
 O E O T T Y U A V V W X P Y X A B S C D N E  
 A S H C U I F T G H I W J W A T S K S L E M  
 R Y P E A N N I O P O Q R Z O N E S T A R E  
 D U E L V G W C X L Y O U T G O I N G G G Z  
 A B L L C D E F L V O C A B U L A R Y H I J  
 K L E O M N O E P Q R S T U V E C I V R E S  
 W X T C Y Z Y A B D I R E C T D I A L C D E

APPENDIX R  
WORD-FIND PUZZLE

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: central, classified, conference, card, credit, data-phone, equipment, exchange, eastern, information, local, mountain, overseas, Pacific, private, station-to-station, person-to-person, teletypewriter, cord

---

T E L E E Y P E W R I T E R O C  
R X D A T A P H O N E R T P S T  
B W Y B K L O M C O R D E E S U  
C R E D I T N E N O P Q L R T V  
G V Z P C C E Q C V E Q E S A E  
C U A A L R A U E E G N T O T C  
A T P C A D S I N R N I Y N I N  
R S R I S L T P T S A A P T O E  
D R I F S A E M R E H T E O N R  
H Q V I I C R E A A C N W P W E  
I P A C F O N N L S X U R E X F  
J O T P I L E T K L E O I R Y N  
K N E J E I H F J Z M M T S A O  
L M I H D F G G C R D D E O B C  
N O I T A M R O F N I E R N C D  
S T A T I O N T O S T A T I O N

APPENDIX Q

WORD-FIND PUZZLE ANSWER KEY

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: Answering, automatic, bellboy, call, card dialer, collect, cordless, courtesy, direct dial, identifying, incoming, key, manner, mobile phone, operator, outgoing, PBX, service, telephone, Touch-A-Matic, time, vocabulary, voice, WATS, yellow pages, zone

C A R D D I A L E R X O P E R A T O R Y Z O  
 K E Y A B Y O B L L E B C D S S E L D R O C  
 S F D E F I G T H I N C O M I N G I C A L L  
 W J K L C D M O N A N S W E R I N G O P Q R  
 I C S T I E U U V W X M O B I L E P H O N E  
 T O Y Z T N A C B C D E E F G H S I T I M E  
 C U J K A T L H M N O C P P Q E R S T U M V  
 H R E W M I X A Y Z I A B B G C D E F G A H  
 B T N I O F J M K O L M X A O P E Q R S N T  
 O E O T T Y U A V V W X P Y X A B S C D N E  
 A S H C U I F T G H I W J W A T S K S L E M  
 R Y P E A N N I Q P O Q R Z O N E S T A R E  
 D U E L V G W C X L Y O U T G O I N G G G Z  
 A B L L C D E F L V O C A B U L A R Y H I J  
 K L E O M N O E P Q R S T U V E C I V R E S  
 W X T C Y Z Y A B D I R E C T D I A L C D E

APPENDIX B

WORD-FIND PUZZLE ANSWER KEY

Directions: Circle the list of words in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: central, classified, conference, card, credit, data-phone, equipment, exchange, eastern, information, local, mountain, overseas, Pacific, private, station-to-station, person-to-person, teletypewriter, cord

T	E	L	E	E	Y	P	E	W	R	I	T	E	R	O	C	
R	X	D A T A P H O N E										R	T	P	S	T
B	W	Y	B	K	L	O	M	C O R D				E	E	S	U	
C R E D I T					N	E	N	O	P	Q	L	R	T	V		
G	V	Z	P	C	C	E	Q	C	V	E	Q	E	S	A	E	
C	U	A	A	L	R	A	U	E	E	G	N	T	O	T	C	
A	T	P	C	A	D	S	I	N	R	N	I	Y	N	I	N	
R	S	R	I	S	L	T	P	T	S	A	A	P	T	O	E	
D	R	I	F	S	A	E	M	R	E	H	T	E	O	N	R	
H	Q	V	I	I	C	R	E	A	A	C	N	W	P	W	E	
I	P	A	C	F	O	N	N	L	S	X	U	R	E	X	F	
J	Q	T	P	I	L	E	T	K	L	E	O	I	R	Y	N	
K	N	E	J	E	I	H	F	J	Z	M	M	T	S	A	O	
L	M	I	H	D	F	G	G	C	R	D	D	E	O	B	C	
N O I T A M R O F N I																
S T A T I O N T O S T A T I O N																

APPENDIX S

SCRAMBLED WORDS

Directions: Unscramble the words, find the hidden telephone terms, and place in the blank provided.

- |                   |     |       |
|-------------------|-----|-------|
| 1. TRIPELTEETERWY | 1.  | _____ |
| 2. AATD-ENOHP     | 2.  | _____ |
| 3. MUCATTAOI      | 3.  | _____ |
| 4. HTCOU-OENT     | 4.  | _____ |
| 5. LALC RTEIDRCO  | 5.  | _____ |
| 6. ODEŞCRLS       | 6.  | _____ |
| 7. RDAC EADIRL    | 7.  | _____ |
| 8. GIRFNRTASERN   | 8.  | _____ |
| 9. YLBLALO        | 9.  | _____ |
| 10. MYSTES        | 10. | _____ |
| 11. RTROY IDAL    | 11. | _____ |
| 12. LOHD YEK      | 12. | _____ |
| 13. COUTH-A-CMITA | 13. | _____ |

Answers: 1. teletypewriter 2. data-phone 3. automatic 4. touch-tone 5. call director 6. cordless 7. card dialer 8. transferring 9. bellboy 10. system 11. rotary dial 12. hold key 13. touch-a-matic.

SUPPLEMENTARY MATERIALS

Cassettes

The Business of Oral Communication  
E956 (20 audio cassettes)  
South-Western Publishing Company  
11310 Gemini Lane,  
Dallas, TX 75229

Filmstrips

Proper Telephone Techniques  
CWFS 105 (2 color filmstrips, 1 cassette)  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. S8  
Chatsworth, CA 91311

Thank You, Please Call Again  
South Central Bell  
Local Office

Telephone Communications  
ZR1183 (2 color filmstrips, 2 cassettes, reproduction masters)  
Prentice-Hall Media  
ServCode ZR  
150 White Plains Road  
Tarrytown, NY 10591

Slides, Transparencies, with Cassette

Telephone Techniques for the Secretary  
ML1351 (27 (35mm.) color slides, 12 transparencies, with 1 cassette)  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. S8  
Chatsworth, CA 91311

16. MM. Film

If the Shoe Fits  
South Central Bell.

## RESOURCES

- Dreher, Barbara. "Groom Your Speech." Today's Secretary, October, 1967, pp. 37 and 72.
- Goozner, Calman. Clerical Practice Skills. New York: Amsco School Publications, Inc., 1978.
- Hayes, Annette. "The Overlooked Skill--Business Telephone Techniques." The Balance Sheet, October, 1978, pp. 59 and 91.
- Jennings, Lucy Mae. Secretarial and Administrative Procedures. Englewood Cliffs: Prentice-Hall, Inc., 1978.
- Kray, Eugene. "A New Telephone Learning Technique." The Balance Sheet, December, 1964, p. 192.
- Mandel, Milton A. "Telephone Performance Tests." The Balance Sheet, May, 1963, pp. 398 and 420.
- Pasewark, Williams R. and Mary Ellen Oliverio. Clerical Office Procedures. Cincinnati: South-Western Publishing Company, 1978.
- Stewart, Jeffery R., Jr., et al. Office Procedures. Dallas: McGraw-Hill Book Company, 1980.
- Tolhuizen, James H. "Communication Habits: A Plan for Change," Business Education Forum, May, 1981, pp. 24-25.
- Uthe, Elaine F. "New Communication Skills in the Age of Interfacing," Business Education Forum, March, 1981, pp. 11-13.

## UNIT III

### WORD PROCESSING CONCEPTS AND HANDS-ON EXPERIENCE

#### INTRODUCTION

With the ever-increasing growth in office technology, it is necessary that today's students be prepared for the changes they will encounter in the business world. This unit is designed to expose students to word processing, records management, reprographics, machine transcription, and the merger of data processing and word processing.

Students will be given activities that will enable them to demonstrate their knowledge and skills in all areas of word processing.

#### COMPETENCIES

1. Exhibit understanding of word processing concepts.
2. Describe the procedures involved in records management, reprographics, and machine transcription.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Use the various filing systems.
2. Describe the reprographics alternatives.
3. Recognize microfilming procedures.
4. Transcribe machine dictation.
5. Exhibit understanding of the merger of data and word processing.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a group of documents in class, the students will be able to index, code, cross-reference, sort, and store the documents alphabetically, geographically, numerically, and by subject with at least 75 percent accuracy.
2. Given a list of filing equipment and supplies and a list of descriptions, the students will be able to choose the description that best defines the equipment and supplies on a written test with at least 75 percent accuracy.

3. Given a list of steps involved in a charge-out system, the students will be able to put these items in correct order in class with at least 75 percent accuracy.
4. Given a list of terms and definitions relating to micrographics on a written test, the students will be able to match them in with at least 75 percent accuracy.
5. Given a list of items and the number of copies to be reproduced, the students will be able to select on a written test the most appropriate method with at least 75 percent accuracy.
6. Given supplies and two documents in class, the students will be able to prepare masters or stencils for duplication in acceptable form. (Prepare for available equipment--mimeograph, fluid duplicator, offset.)
7. Given a prepared stencil and a prepared master, the students will be able to reproduce in class 100 legible copies of the stencil and/or 25 legible copies. A checklist will be used for evaluation.
8. Given a mimeograph or spirit duplicating machine and necessary cleaning supplies, the students will be able to clean machine in class and demonstrate adding fluid or ink with at least 75 percent accuracy.
9. Given one cassette containing three items, the students will be able to transcribe the items in a class period with at least 75 percent accuracy.
10. In a classroom discussion, the students will be able to explain data processing and word processing and how they have merged.

#### SUGGESTED INTEREST APPROACHES

1. Invite a representative from a local business where word processing equipment is used to talk with students about the importance of word processing and the job opportunities.
2. Secure word processing equipment for use in classroom demonstration and/or use.
3. Visit a local business using word processing equipment to expose students to word processing procedures.

## METHODOLOGY

This unit has been designed to enable business students to function in the changing office environment. Teacher lecture will provide content not included in group activities. Textbooks will provide most of the information needed for classroom instruction. Hands-on experience will be provided through various activities.

## UNIT OUTLINE

### WORD PROCESSING CONCEPTS AND HANDS-ON EXPERIENCE

#### I. Word Processing

- A. Cycle
- B. Equipment
- C. Terminology

#### II. Records Management

- A. Filing systems
  - 1. alphabetic
  - 2. numeric
  - 3. geographic
  - 4. subject
- B. Filing equipment
  - 1. vertical
  - 2. lateral
  - 3. open-shelf
  - 4. commercial
  - 5. other
- C. Filing supplies
  - 1. folders
  - 2. guides
  - 3. labels
  - 4. other
- D. Records control
- E. Micrographics
  - 1. definition
  - 2. types:
    - (a) roll film
    - (b) aperture cards
    - (c) microfilm jackets
    - (d) microfiche
  - 3. advantages
  - 4. disadvantages

### III. Reprographics

- A. Definition
- B. Processes
  - 1. carbon
  - 2. copier
  - 3. fluid
  - 4. stencil
  - 5. offset
  - 6. new techniques
- C. Machine use, operation, and maintenance

### IV. Machine Transcription

- A. Introduction to transcription
  - 1. equipment
  - 2. machine operation
- B. Letter transcription

### V. Merging of Word Processing and Data Processing

- A. Comparison
- B. Merger

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given a group of documents in class, the students will be able to index, code, cross-reference, sort, and store the documents alphabetically, geographically, numerically, and by subject with at least 75 percent accuracy.
- 

#### Subject Matter Content

Filing systems and rules

#### Learning Activities

1. Write a paragraph describing a world without filing. (Appendix A)
2. Answer roll by stating your name in indexing order.
3. Index, code, cross-reference, sort, and store letters from typing and shorthand classes.
4. Prepare 3 x 5 cards for each of 50 items in proper indexing form and alphabetize. (Appendix B)
5. Complete filing practice set, except for jobs relating to charge-out.

2. Given a list of filing equipment and supplies and a list of descriptions, the students will be able to choose the description that best defines the equipment and supplies on a written test with at least 75 percent accuracy.

---

Subject Matter Content

Filing equipment and supplies

Learning Activities

1. Prepare a packet of filing supplies.
2. Type labels and affix to folders using "Time and Motion" project. (Appendix C).
3. Complete matching exercise of equipment and supplies. (Appendix D)

- 
3. Given a list of steps involved in a charge-out system, the students will be able to put these items in correct order in class with at least 75 percent accuracy.

---

Subject Matter Content

Records control

Learning Activities

1. Complete "On-the-Job Filing" project: (Appendix E)
2. Complete charge-out job in filing practice set.
3. Prepare a report to be presented orally on records management and control at your training station.

- 
4. Given a list of terms and definitions relating to micrographics on a written test, the students will be able to match them with at least 75 percent accuracy.

---

Subject Matter Content

Micrographics

Learning Activities

1. Prepare a list of terms relating to micrographics.
2. Prepare a list of the advantages of micrographics.

Micrographics

3. Complete a matching exercise on micrographics. (Appendix F)

- 
5. Given a list of items and the number of copies to be reproduced, the students will be able to select on a written test the most appropriate method with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Reprographics processes

1. Complete the matching exercise of terms relating to reprographics. (Appendix G)
  2. Determine whether the statement is an advantage or disadvantage and to which process each applies. (Appendix H)
  3. Choose the correct copying process for a given situation. (Appendix I)
- 

6. Given supplies and two documents in class, the students will be able to prepare masters or stencils for duplication in acceptable form. (Prepare for available equipment--mimeograph, fluid duplicator, offset.)
- 

Subject Matter Content

Learning Activities

Machine use, operation, and maintenance

1. View a film on fluid duplication. (See supplementary materials.)
2. View a film on preparing a stencil. (See supplementary materials.)
3. Participate in the "Tag Quiz" contest. (Appendix J)
4. Prepare a newsletter about the courses offered in the business department on a stencil and/or master.
5. Prepare an announcement concerning the school's open house on a stencil and/or master.

- 
7. Given a prepared stencil and a prepared master, the students will be able to reproduce in class 100 legible copies of the stencil and/or 25 legible copies of the master with at least 75 percent accuracy. A checklist will be used for evaluation.
- 

Subject Matter Content

Learning Activities

Machine operation

1. View a filmstrip on operating the fluid duplicator. (See supplementary materials.)
  2. View a filmstrip on operating a mimeograph duplicator. (See supplementary materials.)
  3. Prepare a bulletin board to show the steps in duplicating and to exhibit work.
  4. Use checklist provided for duplicating machine operation. (Appendices K, L, M, N)
- 

8. Given a mimeograph or spirit duplicating machine and necessary cleaning supplies, the students will be able to clean machine in class and demonstrate adding fluid or ink with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Machine maintenance

1. Report orally on the care and cleaning of each type of reprographics equipment.
2. List the supplies needed for machine operation and cleaning.
3. Demonstrate the proper cleaning techniques for each type of duplicating equipment according to standards specified by manufacturer.

- 
9. Given one cassette containing three items, the students will be able to transcribe the items in a class period with at least 75 percent accuracy.
- 

Subject Matter Content

Machine transcription

Learning Activities

1. View a film on machine transcription. (See supplementary materials.)
  2. Survey the businesses in the community to determine which transcribers are most often used.
  3. Read the accompanying instruction book for the transcriber and go through the steps for transcribing.
  4. Listen to "Office-style" dictation from several principals to introduce various techniques of dictation.
  5. Transcribe assigned cassettes, minicassettes, disc cartridges, and/or magnetic belts in mailable form at the rate of at least 25 words a minute.
  6. Edit a rough-draft transcript from a selected cassette, minicassette, magnetic disc, disc cartridge, and/or magnetic belt and prepare a final copy.
- 

10. In a classroom discussion, students will be able to explain data processing and word processing and how they have merged.
- 

Subject Matter Content

Merger of word processing and data processing

Learning Activities

1. Construct a crossword puzzle with the terms associated with word processing and data processing.
2. Prepare a list of job opportunities for word processing and data processing from your local newspaper.

Merger of word processing  
and data processing

3. Compile a list of career opportunities which have evolved from the merger of data processing and word processing.
4. Outline an article published in a current magazine relating to word processing and/or data processing.

III-9

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Project grades
- \* Rating Sheets

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Filing Practice Set  
Activity Sheets  
Rating Sheets  
Transcribing Equipment and Supplies  
Typewriter  
Typing Paper  
Filing Supplies

### Teacher

Textbook and Manual  
Bulletin Board Supplies  
Rating Sheets  
Practice Set and Manual  
Activity Sheets  
Transparencies  
Overhead Projector  
Duplicating Equipment, Supplies, and Manuals  
Tape Recorder and Tapes  
Filmstrips and Projector  
Transcribing Equipment, Supplies, and Manuals  
Office Supply Catalog

APPENDIX A

Suggested items that may aid students in writing a paragraph describing a world without filing:

1. No way to organize and find books in a library.
2. No system for organizing students' records.
3. No table of contents in books.
4. No system for inventory records in stores.
5. No way to locate medical records of patients.
6. No organization of social security numbers.

APPENDIX B

FILING EXERCISE

Directions

On 3 x 5 cards, properly index the following items and then place them in alphabetical order.

1. John Allen, Jr.
2. M. G. Baine
3. Mrs. Virginia Reese Baine  
(Mrs. Elmer Baine)
4. Mr. Morris A. Brothers
5. Mr. Lorenzo N. D'Arcy
6. Mr. Geo. S. De Vries,  
Atlanta
7. Mr. Richard Ensley
8. Mr. George E. Be Bout
9. Mr. Chas. E. Anders-Clarke
10. Mr. Morris Arnold Brothers
11. Mr. Roy C. Baine
12. Mr. Robert K. Ensley
13. Brother Robt. L. Ensley
14. Mr. John E. Allen
15. Rabbi Morris Brothers
16. Chang Foo Ban
17. Mr. Geo. S. De Vries,  
Boston
18. Mr. James R. Bell, Oxford
19. Miss Claire E. Anders
20. Rev. James R. Bell, New  
Orleans
21. Brother David
22. Mr. Roñ D. Childe
23. A. R. Childers
24. Mr. Charles Cirin, Jr.
25. Mr. Oswald W. Craig-Smythe
26. Mr. Charles Cirin, Sr.
27. Pan-American Shipping Company
28. Queen Ann Fabrics
29. R & A Leather Company
30. Radio and Television Repairs
31. R-U Insurance Agency
32. Queen's Luster Ware
33. Sail-or-Motor Boats, Inc.
34. Mrs. Lucille Ray Ruebro
35. Sailors' Home-From-Home
36. Mr. Steve Ruebro
37. Sailor's Home
38. The 1050 Restaurant
39. Terre Haute Laundry
40. Van Der Veer Toy Shop
41. The Abingdon Daily News,  
Abingdon, NJ
42. James Abingdon Elementary  
School
43. Division of Social Administration  
State Dept. of Public Welfare,  
Montgomery, Alabama
44. State Fisheries Agency,  
Juneau, Alaska
45. Parks and Playgrounds Dept.,  
Alexandria, LA
46. Merchants Bank, Shreveport, LA
47. Merchants Bank, Monroe, LA,  
102 Smith Street
48. Merchants Bank, Monroe, LA,  
200 Smith Street
49. Merchants Bank, Monroe, LA,  
344 Steel Street
50. U. S. Dept. of Agriculture

APPENDIX B -- ANSWER KEY

FILING EXERCISE

- |                |               |
|----------------|---------------|
| 1. <u>41</u>   | 27. <u>25</u> |
| 2. <u>42</u>   | 28. <u>5</u>  |
| 3. <u>43</u>   | 29. <u>6</u>  |
| 4. <u>44</u>   | 30. <u>17</u> |
| 5. <u>45</u>   | 31. <u>7</u>  |
| 6. <u>1</u>    | 32. <u>12</u> |
| 7. <u>14</u>   | 33. <u>13</u> |
| 8. <u>19</u>   | 34. <u>47</u> |
| 9. <u>9</u>    | 35. <u>48</u> |
| 10. <u>3A</u>  | 36. <u>49</u> |
| 11. <u>2</u>   | 37. <u>46</u> |
| 12. <u>11</u>  | 38. <u>27</u> |
| 13. <u>3</u>   | 39. <u>28</u> |
| 14. <u>16</u>  | 40. <u>32</u> |
| 15. <u>8</u>   | 41. <u>29</u> |
| 16. <u>20</u>  | 42. <u>31</u> |
| 17. <u>18</u>  | 43. <u>30</u> |
| 18. <u>21</u>  | 44. <u>34</u> |
| 19. <u>15</u>  | 45. <u>36</u> |
| 20. <u>4</u>   | 46. <u>33</u> |
| 21. <u>10</u>  | 47. <u>37</u> |
| 22. <u>16A</u> | 48. <u>35</u> |
| 23. <u>22</u>  | 49. <u>38</u> |
| 24. <u>23</u>  | 50. <u>39</u> |
| 25. <u>24</u>  | 51. <u>50</u> |
| 26. <u>26</u>  | 52. <u>40</u> |

APPENDIX C

TIME AND MOTION STUDY

Supplies:

Strip of 6 roll labels  
6 self-adhesive labels  
10 3 x 5 cards

1. On a strip of roll labels, type the following five folder titles and attach the labels to the cards while being timed.

Bridges, Alfred  
Covington Building Supply  
Downeyville Boutique (The)  
Evers, John, Lumber Company  
Lawrence (the) Barber

2. On the self-adhesive labels, type the same five folder titles and attach the labels to the cards while being timed.
3. Compare the times.

230

III-14

APPENDIX D  
FILING EQUIPMENT AND SUPPLIES

Match the following.

- |       |  |                          |
|-------|--|--------------------------|
| _____ | 1. Heavy cardboard sheets which are used when charging out papers from the files.                            | a. Vertical files        |
| _____ | 2. Looks like a chest of drawers and are frequently used as area dividers.                                   | b. Lateral files         |
| _____ | 3. Provides a reminder of things a secretary is to do or things she should call to her employer's attention. | c. Shelf files           |
| _____ | 4. Contains material for more than one person or firm.   | d. Guides                |
| _____ | 5. Typical pull-out drawer file cabinet.   | e. Miscellaneous folders |
| _____ | 6. Contains material to or from one person or firm.  | f. Individual folders    |
| _____ | 7. Gummed or adhesive strips on which captions are typed or printed.   | g. Special folders       |
| _____ | 8. Contains materials relating to one specific area.   | h. Labels                |
| _____ | 9. Papers are held in folders placed on shelves in an upright position.                                      | i. Out guides            |
| _____ | 10. Heavy cardboard sheets which are the same size as the folders.   | j. Ticker file           |

ANSWER KEY

APPENDIX D

1. I
2. B
3. J
4. E
5. A

6. F
7. H
8. G
9. C
10. D

APPENDIX F

1. C
2. B
3. F

4. A
5. E
6. D

APPENDIX G

1. E
2. A
3. C
4. G

5. B
6. D
7. F

APPENDIX I

1. fluid
2. carbon
3. stencil
4. fluid
5. stencil

6. copier
7. stencil
8. carbon
9. offset
10. offset

## APPENDIX E

### ON-THE-JOB FILING

Divide into five groups. Each group will be assigned the following job titles: a supervisor, typist, receptionist, and file clerk. Each group will be provided with the following supplies: 2 typewriters or felt tip pens, 1 file drawer, 20 file folders, 20 plastic tabs, 20 labels, file sorter, date stamp and pad, and 30 pieces of correspondence. Each group will set up an alphabetic filing system.

The instructor will then distribute five identical sets of correspondence to each receptionist. The incoming mail is date-stamped and given to the supervisor. The supervisor will read the mail and release it for filing. The clerk and typist will examine, code, and store the material.

When all groups have completed the task assigned, the instructor will ask them to retrieve certain pieces of correspondence while being timed. Each group can then rotate and locate correspondence using the filing system set up by another group.

APPENDIX F  
MICROGRAPHICS

Match the following.

- |       |  |                      |
|-------|--|----------------------|
| _____ | 1. A 4 x 6 sheet of microfilm that can contain 98 business documents reduced 24 times. | a. Micrographics     |
| _____ | 2. Clear folder into which microfilm can be inserted.                                  | b. Microfilm jackets |
| _____ | 3. Makes it possible to place information stored in a computer onto microfilm.         | c. Microfiche        |
| _____ | 4. Process of photographically reducing information to some type of film.              | d. Aperture card     |
| _____ | 5. Oldest and most economical method of microfilming.                                  | e. Roll film         |
| _____ | 6. Card on which a strip or frame of microfilm is mounted.                             | f. COM               |

APPENDIX G

Match the following terms and definitions.

- |        |  |                          |
|--------|--|--------------------------|
| ___ 1. | A part of the graphic arts that is concerned with duplication in the office.   | A. Cold-type composition |
| ___ 2. | Composition by machines such as typewriters or other photocomposing machines.  | B. Fluid process         |
| ___ 3. | The order of written material, pictures, illustrations, and other art work on a page.  | C. Layout                |
| ___ 4. | The process of securing copy, pictures, etc., to put on sheets. This is trimming and positioning the copy and illustrations, then affixing by means of rubber cement, tape, or wax.            | D. Mimeograph process    |
| ___ 5. | The copy is typed directly on a master with a second sheet containing aniline dye which makes a reverse image on the back of the master. Copies are then made by a spirit duplicating machine. | E. Office reprographics  |
| ___ 6. | This process uses a wax coated tissue which is "stencilized" by the typewriter to allow ink to pass through the stencil and leave an ink image on the paper.                                   | F. Offset process        |
| ___ 7. | In this process, the master picks up ink and puts the image on a second roller called a blanket cylinder. The blanket cylinder contacts the paper and produces the printed copy.               | G. Paste-up              |



APPENDIX H. CONTINUED

14. Direct sunlight will fade a duplicated copy.
15. Copies are of a good quality and legible in a variety of ink colors.
16. Copies are relatively inexpensive.
17. Color reproduction is a simple procedure.
18. An operator needs specific training on operation of equipment.
19. Duplicator is good for jobs requiring runs as high as 10,000 copies.

Adv.	Dis-adv.	PROCESSES		
		Fluid	Mimeo-graph	Offset

APPENDIX H

ANSWER KEY

Mark whether the statement is an advantage or disadvantage and if a process is involved, indicate which process.

Example: Equipment costs range from \$500 to \$1,500.

1. Stencils have only a limited production life of up to 3,000 copies.
2. The machine is rather simple in its mechanics and maintenance costs are low.
3. A finished copy can be produced quickly.
4. The process is recommended because of the high-quality appearance of finished copy.
5. Initial cost of equipment is higher than many reproduction methods.
6. The glossy paper needed for duplicating is less expensive than many papers intended for other forms of duplicating.
7. The final copy is not as professional in appearance as the offset.
8. The set-up and clean-up time can slow down production.
9. Only 500 copies can be produced from the finest quality masters.
10. The processes relating to preparing materials for the duplicator are not too time consuming to learn.
11. Electronic scanners allow paste-up copy and pictures to be used.
12. The equipment is clean and easy to operate.
13. Carbon deposits can be easily smeared when errors are corrected.

Adv.	Dis-adv.	PROCESSES		
		Fluid	Mimeo-graph	Offset
	X		X	
	X		X	
X				
X				X
X				X
	X			X
X		X		
	X		X	
	X			X
	X	X		
X				X
X			X	
X			X	
	X	X		

APPENDIX H CONTINUED

ANSWER KEY CONTINUED

14. Direct sunlight will fade a duplicated copy.
15. Copies are of a good quality and legible in a variety of ink colors.
16. Copies are relatively inexpensive.
17. Color reproduction is a simple procedure.
18. An operator needs specific training on operation of equipment.
19. Duplicator is good for jobs requiring runs as high as 10,000 copies.

Adv.	Dis-adv.	PROCESSES		
		Fluid	Mimeo-graph	Offset
	X	X		
X			X	
X		X		
X			X	
	X			X
X				X

## APPENDIX I

### REPROGRAPHICS ALTERNATIVES

Decide the method of duplication (fluid, carbon, stencil, offset, copier) you would recommend. If more than one type of duplicator would be suitable, indicate which one you think would be best.

- \_\_\_\_\_ 1. A form to be used one week in keeping track of time spent daily on a certain job. Sixty copies will be needed.
- \_\_\_\_\_ 2. The first draft of a four-page report to be sent to three executives for preliminary approval.
- \_\_\_\_\_ 3. A form letter about a new product to be sent to 500 customers. Although the letters will not be personalized, the letters should look attractive. Company letterheads will be used.
- \_\_\_\_\_ 4. A rough map of the route to be followed by those going to the annual office picnic.
- \_\_\_\_\_ 5. An announcement to be done in green and red for distribution to 22 employees concerning hours of work over the Christmas weekend.
- \_\_\_\_\_ 6. One copy of a letter received by your employer. He wants to keep the original and send a copy to the branch manager in New Orleans.
- \_\_\_\_\_ 7. A sales bulletin concerning a new product for distribution to 7 branch managers and 50 sales representatives.
- \_\_\_\_\_ 8. A brief informal note enclosed with a letter to Mr. Jackson asking the date of a forthcoming meeting.
- \_\_\_\_\_ 9. An illustrated two-color bulletin describing a new product to be sent to 6,000 customers.
- \_\_\_\_\_ 10. An advertising letter to be distributed to a select list of 100 customers. Either personalized copies or individually typed fill-ins for inside addresses and salutations will be used.

## APPENDIX J

### TAG QUIZ

This type of quiz can be used as a pretest, post-test, or both in conjunction with any unit in which the students must learn the names of supplies and pieces of parts of equipment needed to do the job.

Choose 15 to 25 articles of supplies and equipment and label each with a different number. Place each article in numerical order around the room. Each student prepares a numbered answer sheet and steps in front of one of the items.

On signal from the teacher, the students quickly write down the name of the item opposite its number on the answer sheet. The instructor should allow one to two minutes before going on to the next item. Students move to the next item and repeat the procedure.

APPENDIX K

Fluid Duplicator  
Checklist

Name \_\_\_\_\_

Course \_\_\_\_\_ Date \_\_\_\_\_

Preparation

- \_\_\_\_\_ Adjusts feed table
- \_\_\_\_\_ Adjusts receiving tray properly
- \_\_\_\_\_ Selects proper paper
- \_\_\_\_\_ Fans and jogs paper
- \_\_\_\_\_ Positions paper properly
- \_\_\_\_\_ Sets paper counter
- \_\_\_\_\_ Checks fluid supply

Machine Adjustments

- \_\_\_\_\_ Attaches master properly
- \_\_\_\_\_ Adjusts vertically
- \_\_\_\_\_ Adjusts horizontally
- \_\_\_\_\_ Adjusts impression
- \_\_\_\_\_ Controls fluid supply

Job Completion

- \_\_\_\_\_ Turns off motor
- \_\_\_\_\_ Discards master properly
- \_\_\_\_\_ Places cylinder in inactive position
- \_\_\_\_\_ Inactivates fluid control
- \_\_\_\_\_ Inactivates pressure control
- \_\_\_\_\_ Cleans machine
- \_\_\_\_\_ Covers cylinder properly
- \_\_\_\_\_ Cleans work area
- \_\_\_\_\_ Conserves supplies

NOTES

---

---

---

---

---

---

---

APPENDIX L

Stencil Duplicator  
Checklist

Name \_\_\_\_\_

Course \_\_\_\_\_ Date \_\_\_\_\_

Preparation

- \_\_\_\_\_ Adjusts feed table properly
- \_\_\_\_\_ Adjusts receiving tray properly
- \_\_\_\_\_ Selects proper paper
- \_\_\_\_\_ Fans and jogs paper
- \_\_\_\_\_ Positions paper properly
- \_\_\_\_\_ Sets copy counter
- \_\_\_\_\_ Checks ink supply
- \_\_\_\_\_ Releases brake

Machine Adjustments

- \_\_\_\_\_ Attaches stencil properly
- \_\_\_\_\_ Adjusts vertically
- \_\_\_\_\_ Adjusts horizontally
- \_\_\_\_\_ Adjusts impression
- \_\_\_\_\_ Controls ink supply
- \_\_\_\_\_ Adjusts speed control

Job Completion

- \_\_\_\_\_ Turns off motor
- \_\_\_\_\_ Engages brake
- \_\_\_\_\_ Discards stencil properly
- \_\_\_\_\_ Places cylinder in inactive position
- \_\_\_\_\_ Cleans machine
- \_\_\_\_\_ Covers cylinder properly
- \_\_\_\_\_ Cleans work area
- \_\_\_\_\_ Conserves supplies

NOTES \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

APPENDIX M

Offset Duplicator  
Checklist

Name \_\_\_\_\_

Course \_\_\_\_\_ Date \_\_\_\_\_

Preparation

- \_\_\_\_\_ Adjusts feed table properly
- \_\_\_\_\_ Positions jogger
- \_\_\_\_\_ Positions receiving tray properly
- \_\_\_\_\_ Selects proper paper
- \_\_\_\_\_ Fans and jogs paper
- \_\_\_\_\_ Positions paper properly
- \_\_\_\_\_ Sets copy counter
- \_\_\_\_\_ Checks ink supply

Machine Adjustments

- \_\_\_\_\_ Attaches master properly
- \_\_\_\_\_ Adjusts vertically
- \_\_\_\_\_ Adjusts horizontally
- \_\_\_\_\_ Adjusts impression
- \_\_\_\_\_ Adjusts inking
- \_\_\_\_\_ Adjusts speed control

Job Completion

- \_\_\_\_\_ Discards master properly
- \_\_\_\_\_ Shuts down machine properly
- \_\_\_\_\_ Cleans machine
- \_\_\_\_\_ Cleans work area
- \_\_\_\_\_ Conserves supplies

NOTES \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

APPENDIX N

REPROGRAPHICS SELF-EVALUATION

Name \_\_\_\_\_ Course \_\_\_\_\_ Date \_\_\_\_\_

My appraisal of the attached work. (Check only those that apply.)

	EXCELLENT	GOOD	FAIR
Proofreading			
Corrections			
Following directions			
Neatness			
Placement			
Striking			
Quality of duplication			

I would be proud to submit this work to my employer. Yes No

My overall appraisal of this work: (Circle one)

EXCELLENT

GOOD

FAIR

\* \* \* \* \*

Grade that the teacher thinks this work should receive:   A  

Comments, if any, are on the bottom of this sheet.

SUPPLEMENTARY MATERIALS

Filmstrips w/Cassettes

Duplicating by the Spirit Method

(16 minutes)

Bailey Films  
6509 LeLongpre Avenue  
Hollywood, CA 90053

How to Operate a Mimeograph Duplicator

(20 minutes)

Business Education Films  
5113 16th Avenue  
Brooklyn, NY 11204

The Magic of Xerography

(12 minutes)

Xerox Corporation  
P. O. Box 1540  
Rochester, NY 14603

The Mimeograph

(35 minutes)

A. B. Dick Company  
Contact Local Office

Mimeographing Techniques

(15 minutes)

Bailey Films  
6509 LeLongpre Avenue  
Hollywood, CA 90053

New Duplicating Techniques with Xerography

(17 minutes)

Xerox Corporation  
P. O. Box 1540  
Rochester, NY 14603

The Stencil

(22 minutes)

A. B. Dick Company  
Contact Local Office

Practice Sets/Simulations

Alphabetic Filing Procedures

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Alphabetic Indexing

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Gregg Quick Filing Practice

Gregg/McGraw Hill  
P. O. Box 996  
Norcross, GA 30091

Mercury Systems, Inc.

Gregg/McGraw Hill  
P. O. Box 996  
Norcross, GA 30091

Office Filing Procedures

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

The Word Processing Correspondence Secretary

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Textbooks

Business Filing and Records Control

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Office Systems and Careers

Allyn and Bacon, Inc.  
470 Atlantic Avenue  
Boston, MA 02210

Progressive Filing

Gregg/McGraw Hill  
P. O. Box 996  
Norcross, GA 30091

Records Management: Controlling Business Information

Reston Publishing Co., Inc.  
Reston, VA 22090

Word Processing

Prentice-Hall, Inc.  
Englewood Cliffs, NJ 07632

Word Processing: A Systems Approach to the Office

Harcourt Brace Jovanovich, Inc.  
Atlanta, GA 30301

Word Processing Concepts

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Transparencies

Copying and Duplicating

(Clerical Occupations - No. 7)  
3M Company  
Visual Products Division  
1906 Beaumont Drive  
Baton Rouge, LA 70806

Gregg Filing Transparencies

Gregg/McGraw Hill  
P. O. Box 996  
Norcross, GA 30091

Office Machines, Functions

3M Company  
Visual Products Division  
1906 Beaumont Drive  
Baton Rouge, LA 70806

## RESOURCES.

- Atwood, Illa W. Teaching Office Procedures Today. Portland: J. Weston Walch, Publisher, 1976.
- Bauer, Dennis E. "Reprographics," National Business Education Association Yearbook, No. 18 (1980).
- Bergerud, Marly and Jean Gonzalez. Word/Information Processing Concepts-- Careers, Technology, and Application. New York: John Wiley & Sons, Inc., 1981.
- Bergerud, Marly and Jean Gonzalez. Word Processing Concepts and Careers, 2d ed. New York: John Wiley & Sons, Inc., 1978.
- Cantalupi, John D. "A Newsletter," Balance Sheet. Volume LXI, Number 7 (April, 1980).
- Cecil, Paula B. Word Processing in the Modern Office, 2d ed. Menlo Park: The Benjamin/Cummings Publishing Company, Inc., 1980.
- Enloe, Gertrude M. Competency-Based Curriculum for Articulated Programs in Office Occupations. Washington: U.S. Government Printing Office, 1976.
- Fries, Albert C., et al. Applied Secretarial Procedures, Seventh Edition. New York: McGraw-Hill Book Company, 1974.
- Nelson, Frank E. "Clerical Office Procedures," Business Education Forum. March, 1974.
- Oelrich, Elizabeth S. "Understanding Reprographics," Today's Secretary. October, 1980.
- Oliverio, Mary Ellen and William R. Pasewark. Secretarial Office Procedures. Cincinnati: South-Western Publishing Company, 1977.
- Pasewark, William R. Duplicating Machine Processes, 2d ed. Cincinnati: South-Western Publishing Company, 1975.
- Rosen, Arnold and Rosemary Fielden. Word Processing. Englewood Cliffs: Prentice-Hall, Incorporated, 1977.
- Scharle, Judith A. "Six Myths About Filing," Business Education World. Volume 61, Number 1 (September-October, 1980).
- Stewart, Jeffrey R., Jr., et al. Office Procedures. New York: McGraw-Hill Book Company, 1980.
- Stewart, Jeffrey R., Jr. and Judith A. Scharle. Office Reprographics. New York: McGraw-Hill Book Company, 1979.

UNIT IV  
HUMAN RELATIONS

INTRODUCTION

Rosemary T. Fruehling\* states that human relations is what everyday life is all about. In the everyday world, you relate to people at all times; you depend on people, and other people depend on you. This unit was undertaken to provide the student with tools to develop human relation skills.

Students will be given the opportunity to develop good human relation skills through individual and group activities, checklists, and class discussion.

COMPETENCIES

1. Exhibit an awareness of oneself and others.
2. Apply time management, leadership, and communication skills necessary for effective human relations.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate an understanding of yourself.
2. Demonstrate ability to relate to others.
3. Apply effective techniques for a successful working relationship with supervisor.
4. Recognize the importance of communication to good human relations.
5. Recognize different styles of leadership.
6. Apply principles of time management.

\* Fruehling, Rosemary T., Working At Human Relations, (New York: Gregg Division, McGraw-Hill Book Company, 1977), p. 2.

## SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to define terms related to human relations with at least 75 percent accuracy.
2. Given a list of character traits, students will be able to define them on a written test with at least 75 percent accuracy.
3. Given the necessary background information, students will be able to list on a test at least four basic human needs.
4. Given a list of good health and grooming practices, students will be able to rate their own health and grooming practices and explain the reasons for these ratings in class.
5. At the end of the unit, students will be able to evaluate themselves with a checklist on their ability to cooperate with others and to display an awareness of the needs of others. Seventy-five percent of the items on the checklist must receive an average rating.
6. After a class discussion, student groups will be able to write scripts showing at least two communication problems and how these problems affect human relations.
7. On a written test, students will be able to state at least two causes of stress.
8. At the end of a class discussion, students will be able to list three prejudices that hinder good human relations.
9. On a written test, students will be able to list at least five types of discrimination.
10. During class, students will be able to distinguish between a list of discriminatory and non-discriminatory behaviors with at least 75 percent accuracy.
11. Given a list of managerial behaviors on a written test, students will be able to match the behavior with the leadership style displayed with at least 75 percent accuracy.
12. On a written test, students will be able to place job tasks in order of priority with at least 75 percent accuracy.
13. In a class discussion, students will be able to give acceptable ways to handle crises and pressure situations.

## SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' knowledge of "human relations."
2. Have a business manager speak on the importance of getting along with others.
3. Provide students with checklists and assignment sheets on health and grooming practices, getting along with others, discrimination, and leadership skills.

## METHODOLOGY

This unit has been planned to include activities to improve human relation skills. Teacher lecture will be used to present content material obtained from resources available. For effective presentation of this material, the student must be involved individually or in groups.

## UNIT OUTLINE

### HUMAN RELATIONS

#### I. Personal Skills

##### A. Internal

1. Character traits
2. Human needs

##### B. External

1. General health
2. Grooming and cleanliness

#### II. Job-Keeping Skills

##### A. People

1. Peers
2. Employers
3. Customers

##### B. Communications

1. Oral
2. Written
3. Body language

### III. Coping Skills

- A. Stress
- B. Discrimination
  - 1. Discrimination problems
  - 2. Sexual harassment
  - 3. Legal aspects

### IV. Leadership Skills

- A. Styles
  - 1. Authoritarian
  - 2. Democratic
  - 3. Laissez-faire
- B. Comparisons
  - 1. Advantages
  - 2. Disadvantages

### V. Time-Management Principles

- A. Efficient use of time
- B. Crises
- C. Pressure situations

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. On a written test, students will be able to define terms related to human relations with at least 75 percent accuracy.
- 

### Subject Matter Content

Human relations

### Learning Activities

1. Form groups and use a dictionary to define the following human relations terms:
  - a. human relations
  - b. communications
  - c. cooperation
  - d. needs
  - e. self-imagePresent group definitions to class and come up with one definition for the class.
2. Divide into groups and compose a human relations problem.

Human relations

3. Solve a human relations problem prepared by another group (work in groups). Present solution to class.
4. Write an essay on the importance of human relations in work situations. Present in class.

- 
2. Given a list of character traits, students will be able to define them on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Positive character traits

Learning Activities

1. Prepare a bulletin board depicting positive character traits.
2. Write sentences with the following character traits:
  - a. tact
  - b. loyalty
  - c. compatability
  - d. poise
  - e. congeniality
  - f. cooperativeness
  - g. dependabilityExchange papers and in small groups check the sentences.
3. Write a short paragraph explaining why an employee may be dismissed because of poor character traits. Discuss paragraphs in class.
4. Interview a personnel manager to determine the character traits most desired in an employee. Compile a class list and post on bulletin board.

- 
3. Given the necessary background information, students will be able to list on a test at least four basic human needs.
- 

Subject Matter Content

Learning Activities

Basic human needs

1. Discuss the basic human needs and construct a definition and example of each. Work in small groups.
2. Complete the Scrambled Words Exercise on basic human needs. (Appendix A)
3. Pick a need from slips of paper in a hat and write a brief paragraph showing how you would be affected by the deprivation of one of the basic human needs. Discuss in class.

- 
4. Given a list of good health and grooming practices, students will be able to rate their own health and grooming practices and explain the reasons for these ratings in class.
- 

Subject Matter Content

Learning Activities

Health and grooming practices

1. Evaluate yourself on health and grooming practices. Checklist provided. Identify weaknesses and present a plan for improvement. (Appendix B)
2. List ways poor health may impair your efficiency on the job. Work in groups. Present to class for discussion.
3. Prepare a booklet depicting acceptable work attire. Display in class.

- 
5. At the end of the unit, students will be able to evaluate themselves with a checklist on their ability to cooperate with others and to display an awareness of the needs of others. Seventy-five percent of the items on the checklist must receive an average rating.
- 

Subject Matter Content

People

Learning Activities

1. Divide into groups and demonstrate a situation showing good human relations and another showing poor human relations for each of the following relationships:
    - a. employee--employee
    - b. employer--employee
    - c. customer--employee
  2. Suggest ways to get along with others--co-workers, employers, customers. Work in small groups. Present to class for discussion.
  3. Evaluate yourself on a checklist for getting along with others. Share with another to see if they agree. (Appendix C)
- 

6. After a class discussion, student groups will be able to write scripts showing at least two communication problems and how these problems affect human relations.
- 

Subject Matter Content

Communications

Learning Activities

1. Identify barriers to communication that contribute to poor human relations. Work in small groups. Discuss these as a class.
2. Write a short report describing situations when poor human relations resulted from ineffective communications. In groups, change the situation to improve human relations and present to the class.

Communications

3. Analyze conversations for good or poor human relations. In class, cite any communication problems observed.
4. Obtain copies of letters and/or memos from local businesses and analyze them for clarity of message.
5. Play charades to show how body language can be used in communications.
6. Write a script in groups, depicting at least two communications problems. Act out the script before the class.

---

7. On a written test, students will be able to state at least two causes of stress.

---

Subject Matter Content

Stress

Learning Activities

1. List factors which contribute to job stress. Compile into one list as a class.
2. Identify the causes of stress in case studies distributed by the teacher to small groups. Share your results with the class.
3. Select at least one appropriate remedy for each cause of stress identified in case studies. Discuss these as a class.

---

8. At the end of a class discussion, students will be able to list three prejudices that hinder good human relations.

---

Subject Matter Content

Discrimination

Learning Activities

1. State your definition of prejudice and compile a class definition.

Discrimination

2. Cite examples of discrimination that you might have encountered on the job. Present for class discussion.
3. Describe how prejudices can hinder human relations. Work in small groups. Report to the class.

---

9. On a written test, students will be able to list at least five types of discrimination.

---

Subject Matter Content

Learning Activities

Discrimination--legal aspects

1. Write a report on recent laws affecting job discrimination. Present to the class.
2. Read information concerning the Civil Rights Act of 1964. Report to the class the types of discrimination most affected by this act.
3. Discuss areas where you may be subject to discrimination and report to the class. Work in small groups.
4. List at least two ways to overcome discrimination in the situations from Activity 3 and present to the class.

---

10. During class, students will be able to distinguish between a list of discriminatory and non-discriminatory behaviors with at least 75 percent accuracy.

---

Subject Matter Content

Learning Activities

Discrimination problems

1. Complete a worksheet showing examples of discriminatory and non-discriminatory behaviors. (Appendix D)

Discrimination problems

2. Research newspaper articles, periodicals, and books for discrimination cases and report the results to the class.
3. Indicate means of dealing with discrimination in a positive manner in a group discussion.

---

11. Given a list of managerial behaviors on a written test, students will be able to match the behavior with the leadership style displayed with at least 75 percent accuracy.

---

Subject Matter Content

Leadership skills

Learning Activities

1. Identify the three main styles of leadership (management). Discuss the characteristics of each. Work in small groups.
2. Compare the advantages and disadvantages of each leadership style.
3. Role play a sample business situation in groups with a designated leader. Checklists will be used by group members to rate the leader. (Appendix E) The leader must receive an overall average rating. Group members will identify the management style displayed.

---

12. On a written test, students will be able to place job tasks in order of priority with at least 75 percent accuracy.

---

Subject Matter Content

Efficient use of time

Learning Activities

1. Develop a schedule for completing job tasks in the most efficient manner.

Efficient use of time

2. Keep a record of time spent on various activities for a week and list ways to make better use of time.
3. Analyze your job and list tasks according to rush, important, and routine. Present your list to the class.

- 
13. In a class discussion, students will be able to give acceptable ways to handle crises and pressure situations.
- 

Subject Matter Content

Crises and pressure situations

Learning Activities

1. List ways to organize yourself in order to avoid crises. Discuss in class.
2. Talk with office workers to find out how they handle pressure situations. Report the results to class.
3. Obtain suggestions from other workers on saving time and energy in completing office tasks. Share the suggestions with the class.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Individual and group projects
- \* Class participation grade
- \* Checklists

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Checklists  
Worksheets  
Case Studies  
Reference Books  
Pen/Pencil

### Teacher

Textbook and Manual  
Bulletin Board Supplies  
Checklists  
Worksheets

261

APPENDIX A  
SCRAMBLED WORDS

Listed below are several scrambled words having to do with human needs.  
See how many words you can unscramble. Write in the blank provided.

6  
vlsrvuia

\_\_\_\_\_

usyeirtc

\_\_\_\_\_

taeccpane

\_\_\_\_\_

tecsrpe

\_\_\_\_\_

ttleopani

\_\_\_\_\_

lhreest

\_\_\_\_\_

mnaoidart

\_\_\_\_\_

fsle-treiaolniza

\_\_\_\_\_

tdmnuegrsdia

\_\_\_\_\_

Answers: survival, security, acceptance, respect, potential,  
shelter, admiration, self-realization, understanding

APPENDIX B

HEALTH AND GROOMING CHECKLIST

Place a check in the column which best describes your health and grooming habits. If you check "part of the time" or "never," write a plan for improvement.

Do you . . .	Most of the time	Part of the time	Never
1. Eat well-balanced meals?			
2. Get the required amount of sleep?			
3. Get enough physical exercise?			
4. Have an annual physical check-up?			
5. Go to the dentist on a regular basis?			
6. Bathe or shower daily?			
7. Brush your teeth at least twice a day?			
8. Wash your hair on a regular basis?			
9. Use deodorant daily?			
10. Have a blemish-free complexion?			
11. Have your hair cut neatly or becomingly styled?			
12. Have fresh breath?			
13. Manicure your nails regularly?			
14. Dress appropriately for work?			

APPENDIX B CONTINUED

Do you	Most of the time	Part of the time	Never
15. Choose comfortable clothing?			
16. Check your overall appearance?			
17. Choose becoming clothes?			
18. Keep your clothes clean and mended?			
19. Wear well-fitting shoes?			
20. Practice correct posture?			

APPENDIX C

GETTING ALONG WITH OTHERS

In an office, people must know how to get along with others. As a self-test, rate yourself by checking the appropriate column. Write a plan for improvement. (5 is the highest)

	Rating				
	5	4	3	2	1
1. Cooperative					
2. Tactful					
3. Good natured.					
4. Friendly					
5. Courteous					
6. Punctual					
7. Considerate					
8. Initiative					
9. Loyal					
10. Organized					
11. Efficient					

APPENDIX C

ANALYSIS

31 to 55 points: You should be able to get along with others.

15 to 30 points: You will probably get along with most people. Try working toward more "5" ratings.

0 to 14 points: You will have trouble getting along with others. You must attempt to display positive characteristics.)

## APPENDIX D

### RECOGNIZING DISCRIMINATION

Analyze the following situations and decide whether each is discriminatory or non-discriminatory. If the situation is discriminatory, identify the type of discrimination and give reasons why you feel the situation is discriminatory. Write your answers on a separate sheet of paper.

1. The boss decides to hire a female for the job because her salary expectations are probably lower than a male's.
2. An employee who has been with the company for 30 years is passed over for a promotion because it is felt that he/she is too old to learn a new job.
3. A woman with qualifications equal to a prospective male employee is not hired because the boss feels she may take more time off due to her responsibilities as a mother.
4. Two teenagers are hired for summer work. The black teen is assigned to the maintenance department. The white student will be working in the manager's office.
5. The company has a policy of not hiring anyone under age 18. This was brought about by bad experiences with part-time student help.
6. Only Catholics are hired as teachers or staff members in Catholic schools.
7. Male employees are required to wear a coat and tie. There is no specified dress code for females.
8. A company keeps three inefficient workers but fires a handicapped worker whose job record is not worse than the other three.
9. A new employee spoke with an Italian accent. The supervisor was extra careful to use small words and speak distinctly when giving instructions to this new employee.
10. Three members of the typing pool were up for the job of receptionist--two females and one male. The executives decided to promote either one of the "girls" without looking at their qualifications. They felt a girl would "brighten up" the front office.

APPENDIX E

CHECKLIST OF LEADERSHIP SKILLS

Use the following checklist to rate your group leader on quality of leadership skills displayed.

	never 1	seldom 2	sometimes 3	often 4	always 5
Ability to delegate					
Accepts suggestions					
Challenging					
Fair					
Gives encouragement					
Motivates					
Organized					
Praises					
Self-confident					
Sincerely interested in others					
Tactful					
Thinks independently					
Enthusiastic					
Knowledgeable					

Leadership style displayed: \_\_\_\_\_

Overall rating of leader: \_\_\_\_\_

## SUPPLEMENTARY MATERIALS

### Activity Packs

#### Activities for Exploring Values

01-7447-B5 (50 photocopy masters)

03-7447-B5 (50 spirit masters)

J. Weston Walch, Publisher

Box 658

Portland, ME 04104-0658

#### Listening Skills

09-1916-B5 (12 spirit masters)

J. Weston Walch, Publisher

Box 658

Portland, ME 04104-0658

#### Office Practice Activities

03-24180B5 (50 spirit masters)

J. Weston Walch, Publisher

Box 658

Portland, ME 04104-0658

#### Teacher Aids for Office Practice Classes

03-2420-B5 (50 spirit masters)

J. Weston Walch, Publisher

Box 658

Portland, ME 04104-0658

### Cassettes

#### The Business of Oral Communication

E956 (20 Audio Cassettes, Modules 1, 2, and 3)

South-Western Publishing Company

11310 Gemini Lane

Dallas, TX 75229

#### Case-Study Cassette Library: Career Core Competencies

87780-7 (21 audio cassettes)

Gregg McGraw-Hill Book Company

P. O. Box 996

Norcross, GA 30091

#### Gregg Secretarial Training Recordings, Set 1

87775-0 (6 cassettes)

Gregg McGraw-Hill Book Company

P. O. Box 996

Norcross, GA 30091

263

Cassettes continued

On the Job

K4KK 0902 (20 cassettes, 24 student record books)  
Educational Audio Visual, Inc.  
Pleasantville, NY 10570

Filmstrips with Cassettes

Becoming an Adult: A Disney Family Studies Series

63-8085CA (5 filmstrips, 5 cassettes, 5 spirit masters)  
Walt Disney Educational Media Company  
500 South Buena Vista Street  
Burbank, CA 91521

Job Attitudes and Habits

K1KF 4405 (5 filmstrips, 5 cassettes)  
Educational Audio Visual, Inc.  
Pleasantville, NY 10570

Textbooks

Dramatizations for Business Classes

01-2006-B5  
J. Weston Walch, Publisher  
Box 658  
Portland, ME 04104-0658

Human Relations in Business

G18  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Modern Ms.

Second edition  
69663-2 (text-workbook)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Office Etiquette

01-2036-B5  
J. Weston Walch, Publisher  
Box 658  
Portland, ME 04104-0658

270-21

Textbooks continued

Personal Psychology for Life and Work

03592-X (text-workbook)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Transparencies

Personal Development Transparency-Series

K401 (80 transparencies)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Transparencies for the Basic and Social Skills, Vol. 1: Communica-  
tions in Marketing

86471-3  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Transparencies for the Basic and Social Skills, Vol. 3: Psychology  
and Human Relations in Marketing

86473-X  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

271

## RESOURCES

- Eggland, Steven A. and John W. Williams. Human Relations at Work. 2nd ed. Cincinnati: South-Western Publishing Company, 1981.
- Fruehling, Rosemary T. and Edwin L. Herr. Working at Human Relations. New York: McGraw-Hill Book Company, 1977.
- George, Claude S., Jr. Supervision in Action: The Art of Managing Others. Reston Publishing Company, Inc., 1979.
- Group Instruction for Cooperative Programs. State Department of Vocational and Technical Education, Stillwater, Oklahoma, 1978.
- Hanna, J. Marshall, et al. Secretarial Procedures and Administration. Cincinnati: South-Western Publishing Company, 1978.
- Hiserodt, Donald D. Psychology and Human Relations in Marketing. New York: McGraw-Hill Book Company, 1969.
- Meehan, James R., et al. Secretarial Office Procedures. Cincinnati: South-Western Publishing Company, 1972.
- Russon, Allien R. and Harold R. Wallace. Personality Development for Work. Cincinnati: South-Western Publishing Company, 1981.
- Steinmetz, Lawrence L. Human Relations: People and Work. New York: Harper & Row, Publishers, 1979.
- Stewart, Jeffrey R., Jr., et al. Office Procedures. New York: McGraw-Hill Book Company, 1980.
- Williams, J. Clifton. Human Behavior in Organizations. Cincinnati: South-Western Publishing Company, 1978.
- Williams, John W. and Steven A. Eggland. Communicating at Work. Cincinnati: South-Western Publishing Company, 1979.

UNIT V  
SECURING AND KEEPING A JOB

INTRODUCTION

In the competitive job market, it is necessary that a prospective employee develop skills needed for employment now and in the future. This unit allows students the opportunity to develop those skills.

COMPETENCIES

1. Prepare for career opportunities.
2. Develop good grooming habits.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Research available job opportunities.
2. Prepare for employment.
3. Exhibit desirable dress and grooming characteristics.
4. Perform follow-up procedures.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. In a classroom discussion, students will be able to identify the sources for employment with at least 75 percent accuracy.
2. Given the necessary information, students will be able to compose and type in class a letter of application and a personal data sheet with 100 percent accuracy.
3. On a written test, students will be able to complete the necessary employment forms with 100 percent accuracy.
4. Given several illustrations, students will be able to select those appropriately dressed for the office with 100 percent accuracy.

5. In a classroom discussion, students will be able to identify effective interview techniques with at least 75 percent accuracy.
6. In a classroom discussion, students will be able to explain proper job follow-up procedures with at least 75 percent accuracy.

### SUGGESTED INTEREST APPROACHES

1. Bring classified ads from the local newspaper for discussion of job qualifications and opportunities for employment.
2. Prepare a bulletin board displaying appropriate dress and grooming techniques.
3. Invite a local personnel director to discuss techniques for securing and keeping a job.

### METHODOLOGY

This unit has been designed to introduce students to those skills necessary for securing and keeping a job. Teacher lecture and classroom discussion will be used to present the unit content. Students will complete forms necessary for employment.

### UNIT OUTLINE

#### SECURING AND KEEPING A JOB

- I. Research of Job Market
  - A. Job Opportunities
    1. Employment agencies
    2. Classified ads
    3. Direct inquiry
    4. Miscellaneous
  - B. Job Qualifications
- II. Letter of Application/Data Sheet
  - A. Styles
  - B. Content
- III. Employment Forms
  - A. Application
  - B. W-4

274

v-2

IV. Personal Appearance and Grooming

- A. Appropriate clothing
- B. Business standards of grooming

V. Interview

- A. Procedures
- B. Materials needed

VI. Follow Up

- A. Evaluation of job offer
- B. Telephone call/letter

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. In a classroom discussion, students will be able to identify the sources for employment with at least 75 percent accuracy.
- 

Subject Matter Content

Job research

Learning Activities

1. Contact a local employment agency and report to the class the procedures involved in obtaining a job through that agency.
2. List the skills you possess which will help you qualify for an office position.
3. Compile a list from the classified ads of those job opportunities for which you are now qualified and those which require additional training using the information from Activity 2.
4. Contact the school placement office/counselor for available job opportunities and compile a list for classroom discussion.
5. After class discussion, list the sources available for obtaining a job.

Job research

6. Research and prepare a report to be presented orally on an occupation that best fits your interests, abilities, skills, values, lifestyle, and other personal goals. (Appendix A)

- 
2. Given the necessary information, students will be able to compose and type in class a letter of application and a personal data sheet with 100 percent accuracy.
- 

Subject Matter Content

Letter of application and data sheet

Learning Activities

1. Examine various styles used in constructing a personal data sheet.
2. Compile a list of the information that should be included on a personal data sheet.
3. Prepare a personal data sheet.
4. List the basic outline for an application letter.
5. Apply for a position by composing and typing a letter of application using the information from Activity 4.
6. Have peers evaluate Activities 3 and 5.

- 
3. On a written test, students will be able to complete the necessary employment forms with 100 percent accuracy.
- 

Subject Matter Content

Employment forms

Learning Activities

1. Examine sample application forms and discuss in class the information requested.
2. Complete a Form W-4.

V-4

276

Employment forms

3. Complete an application form.
4. Research what can and cannot be legally asked on an application form and report to the class.

- 
4. Given several illustrations, students will be able to select those appropriately dressed for the office with 100 percent accuracy.
- 

Subject Matter Content

Appropriate dress/grooming

Learning Activities

1. Dress in appropriate office attire on a particular day and evaluate each other using checklist provided. (Appendix B)
2. Select five examples of appropriate office attire from current magazines. Label and display on a bulletin board for class discussion.
3. View a filmstrip on personal grooming and take notes on grooming habits on which you need to improve.
4. Read a book on "grooming" and report to the class.

- 
5. In a classroom discussion, students will be able to identify effective interview techniques with at least 75 percent accuracy.
- 

Subject Matter Content

Job Interview

Learning Activities

1. View a filmstrip on the job interview and discuss in class.
2. List ten "Dos" and "Don'ts" for a job interview.
3. Discuss in small groups the questions frequently asked during an interview. (Appendix C)

Job interview .

4. Role play a situation where you make a job interview appointment by phone. Class will evaluate using checklist provided. (Appendix D)
5. Research what can and cannot be legally asked by an interviewer and discuss in class. Include discussion on how the interviewer should react to questions that are illegal to ask.

- 
6. In a classroom discussion, students will be able to explain proper job follow-up procedures with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Follow-up

1. After classroom discussion, list ten items to consider when evaluating a job offer.
2. After viewing examples supplied by teacher, list points to be included in a follow-up letter.
3. After demonstration, list the information needed for making a follow-up telephone call.
4. Role play effective and ineffective follow-up phone calls.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Subject area tests
- \* Rating sheets
- \* Checklists
- \* Class participation grade
- \* Unit test
- \* Individual research

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Practice Sets  
Checklists  
Pencil/Pen  
Instruction Sheets  
Typing Paper  
Case Study Problems  
Typewriter  
Correction Materials

### Teacher

Textbook and Manual  
Filmstrips  
Filmstrip Projector  
Overhead Projector  
Transparencies  
Transparency Pen  
Checklists  
Rating Sheets  
Bulletin-Board Supplies  
Projector Screen  
Teacher-made Tests  
Cassette Player  
Cassette Tapes

## APPENDIX A

### OCCUPATIONAL RESEARCH

Select an occupation from the Dictionary of Occupational Titles or the Occupational Outlook Handbook that best fits your interests, abilities, skills, values, life-styles, and other personal goals. You may use one or more ways to research the occupation.

- \* Use written resources
- \* Interview employees in the field using the survey included
- \* Write companies in that field for information

Prepare a written report to be presented orally on the occupation selected.

-----

#### SUGGESTED QUESTIONS FOR INTERVIEWING EMPLOYEES IN THE FIELD:

What are your duties?

What are your working hours?

How often are you required to work overtime?

How are your duties different from day to day?

What type of special clothing or shoes are required for work?

How do you depend on other people to help you or your work?

How do others depend on your work?

What kinds of talents, interests, or abilities would be helpful to a person for succeeding in your field?

What are the physical demands of your work?

What personal qualities are important for your work?

What are the salary ranges, saving programs, or profit-sharing programs?

What are the fringe benefits--vacation time, sick leave, insurance, and educational leave?

What is the approximate starting salary in this type of work?

In what other areas can a person use the knowledge and skills learned in this occupation?

What are the legal regulations?

What are the physical qualifications?

What decisions are you responsible for on your job?

What other information about your job would you like to tell me?

APPENDIX B

CHECKLIST FOR APPROPRIATE OFFICE ATTIRE

Women

- Coordinated outfit, freshly cleaned and pressed
- Clean shoes in good repair that match apparel
- Hosiery that blend with skin tone, free from runs and snags
- Simple purse that coordinates with clothing
- Clean and neatly styled hair
- Clean and well-shaped nails (pleasing nail polish, if desired)
- Neatly applied makeup, conservative and well blended
- General cleanliness

Men

- Coordinated outfit, freshly cleaned and pressed
- Clean shoes in good repair that match apparel
- Appropriate tie
- Socks coordinated with trousers
- Fresh shave
- Clean, well-kept hair
- Clean and well-shaped nails
- General cleanliness

## APPENDIX C

### QUESTIONS AN EMPLOYER MIGHT ASK

1. What kind of job do you want?
2. Why do you want this job? Why have you selected this kind of work?
3. If you had your choice of job and company, what would you most like to be doing and where?
4. What experience have you had?
5. What can you do?
6. How much education have you had?
7. What special training have you had?
8. What kind of student were you in high school?
9. In what extracurricular activities did you participate in school?
10. What do you do with your spare time? What are your hobbies?
11. How well do you get along with others?
12. How well do you follow instructions?
13. How well do you take constructive criticism?
14. What salary do you expect? When would you expect your first raise?
15. What are your objections to working overtime or shift work, if operations are conducted around the clock?
16. How do you feel about travel?
17. What are your objections to being transferred to another location, if necessary?
18. Would you watch the clock or would you concentrate on your work?
19. What kind of person was your former employer?
20. What type of reference will your former employer or teacher give you?
21. Would you talk about your employer or the company at home?
22. How do you feel about helping others with their work after you have finished your work?
23. What effort would you make to get along with other employees?

282

APPENDIX D

CHECKLIST FOR USING THE TELEPHONE TO ARRANGE A JOB INTERVIEW

1. Was prepared before calling.
2. Identified self immediately.
3. Did not hesitate to find the right words.
4. Gave reasons for calling immediately.
5. Asked for the best time for an appointment with the interviewer.
6. Asked about getting application form.
7. Was courteous and friendly.
8. Thanked the secretary.
9. Noted the interview date, time, and place.

Yes	No

## SUPPLEMENTARY MATERIALS

### Films

#### Applying for a Job

Encyclopedia Britannica Educational Corp.  
425 North Michigan Avenue  
Chicago, IL 60611

#### Getting a Job Is a Job

Dobie-Dash Productions  
4949 Hollywood Boulevard  
Suite 217  
Hollywood, CA 90028

#### I Guess I Got the Job

McGraw-Hill Films  
1221 Avenue of the Americas  
New York, NY 10020

#### Your Job: Applying for It

Coronet Films  
Coronet Building  
63 East South Water Street  
Chicago, IL 60601

#### Your Job: Finding the Right One

Coronet Films  
Coronet Building  
63 East South Water Street  
Chicago, IL 60601

### Filmstrips with Cassettes

#### Entering the World of Work Series

McKnight Publishing Company  
Bloomington, IN 47405

#### First Job Multimedia Program

EG340  
Cole Supply Company  
P. O. Box 1717  
Pasadena, TX 77501

#### Human Relations for Success In Business

Catalog No. 13-5  
Educational Publishers  
3839 White Plains Road  
Bronx, NY 10467

Office Education Series I & II  
International Film Bureau, Inc.  
332 South Michigan Avenue  
Chicago, IL 60604

Office Worker Series  
Catalog No. IE 119  
Career Aids Inc.  
8950 Lurline Avenue  
Dept. K45  
Chatsworth, CA 91311

Personal Hygiene for Business  
Milady Publishing Company.  
3839 White Plains Road  
Bronx, NY 10467

Winning the Job  
XC214  
Cole Supply Company  
P. O. Box 1717  
Pasadena, TX 77501

Writing Friendly Letters, Business Letters, and Resumes  
CV374CAF  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. K45  
Chartsworth, CA 91311

Pamphlets

Appointment with Tomorrow  
Vaseco, Inc.  
2301 Classen Boulevard  
P. O. Box 60274  
Oklahoma City, OK 73106

How Not to Blow a Job Interview  
Available free from the Army Reserve recruiter

How to Get and Hold the Right Job  
Available from your local state employment service office

How to Prepare Yourself for Job Interviews  
Available from your local state employment service office

How to "Sell Yourself" to an Employer  
Available from your local state employment service office

Textbooks

Clerical Office Procedures

Catalog No. K38  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Getting a Job--Process Kit

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

How to Find and Apply for a Job

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

The Job You Want--How to Get It

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

286

## RESOURCES

Hanna, J. Marshall, et al. Secretarial Procedures and Administration. Dallas: South-Western Publishing Company, 1978.

Lee, LaJuana Williams, et al. Business Communications. Chicago: Rand McNally College Publishing Company, 1980.

Nelson, Frank W. Group Instruction for Cooperative Programs. Stillwater: State Department of Vocational and Technical Education, 1978.

Stewart, Marie M., et al. College English and Communication. New York: McGraw-Hill Book Company, 1975.

V-15

287

## UNIT VI

### COMMUNICATION SKILLS

#### INTRODUCTION

Communication is involved in all activities with others. Those who are the most successful in the business world have acquired the techniques of receiving messages attentively and sending messages that promote favorable responses.

This unit attempts to aid students in realizing that every communication is a sales project--to sell an idea, a product, or a point of view. When they accept this philosophy, they will automatically strive for perfection in communicating.

#### COMPETENCIES

1. Send and receive messages successfully.
2. Use oral and written communications effectively.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of effective communications.
2. Develop ability to send and receive messages.
3. Demonstrate the correct use of basic English language skills.
4. Handle incoming and outgoing correspondence effectively.
5. Prepare business documents.
6. Employ successful reading, writing, speaking, and listening skills.

## SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. After a lecture on "The Importance of Effective Communications in Business," students will be able to list on a test five reasons why communicating is important today.
2. Given a list of situations, students will be able to indicate in written statements how to say "no" courteously and retain the friendship of the inquirer, with an average rating of not less than three when evaluated on a scale of one to five (one being the highest).
3. Given a list of sentences in class, students will identify the underlined parts of speech with at least 75 percent accuracy.
4. Given a list of incorrect sentences on a test, students will re-write them correctly with at least 75 percent accuracy using good sentence structure, proper words, proper punctuation, and proper capitalization.
5. After class discussion, students will be able to list on a written test seven of ten qualities of effective business letters.
6. On a written test, students will be able to define seven of ten qualities for effective business letters.
7. On a production test, students will be able to produce within 120 minutes three of the following business letters. Evaluation will be based on the qualities for effective business letters.
  - a. Thank you letter
  - b. Request for information
  - c. Letter of recommendation
  - d. Letter of acknowledgment
  - e. Letter of congratulations
8. Given examples in class, students will be able to prepare the following business documents: interoffice memorandums, minutes, financial records, and manuscripts with at least 75 percent accuracy.
9. Given a list of business-related topics, students will be able to present a three-to-five minute oral report in class. Evaluation will be based on a checklist containing good oral reporting techniques.
10. Given a newspaper article to read in a group situation, students will be able to answer orally questions related to the article with at least 75 percent accuracy.

## SUGGESTED INTEREST APPROACHES

1. Invite a local newspaper reporter or anchorperson to speak on the importance of effective communications.
2. Make bulletin board displays focusing on the art of communication.
3. Have students check local newspaper printouts for grammatical errors.
4. Tape students as they present talks, speeches, and reports in two classroom situations (announced and unannounced) so that they may hear their oral communication skills.

## METHODOLOGY

This unit on communication has been developed to familiarize students with the methods and techniques of effective business communication. Modes of presentation will be teacher lecture, newspaper activities, guest speakers from communications media, taped discussions, letter writing, and oral reports.

## UNIT OUTLINE

### COMMUNICATION SKILLS

- I. Recognizing the Importance of Effective Communications
  - A. Characteristics and standards of business communication
  - B. Communication skills for everyday living
- II. Sending and Receiving Messages
  - A. Roles of senders and receivers
  - B. Importance of and need for empathy
- III. Using Correct Language Skills
  - A. Variety in business word usage
  - B. Qualities of good business writing
- IV. Handling Correspondence Effectively
  - A. Effective business letters
  - B. Incoming and outgoing correspondence

V. Preparing Other Business Documents.

- A. Clarity and conciseness in business communications.
- B. Purposes of preparing business reports

VI. Employing successful reading, writing, speaking, listening skills

- A. Speaking skills
- B. Listening skills
- C. Reading skills

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. After a lecture on "The Importance of Effective Communications in Business," students will be able to list on a test five reasons why communicating is important today.
- 

Subject Matter Content

Effective communications

Learning Activities

1. Write a paragraph on "The Importance of Effective Communications" and present to class for discussion.
2. Play an advertising slogan game and discuss the effectiveness of this type of communication. (Appendix A)
3. Play a class rumor game and discuss the possible effects of this kind of communication. (Appendix B)
4. View a filmstrip on communications and break into groups to list the main ideas of the film, putting them in order of importance. A single list can then be compiled on the chalkboard.
5. Interview a local secretary to ascertain the importance of handling incoming and outgoing correspondence effectively. Give an oral report to the class.

- 
2. Given a list of situations, students will be able to indicate in written statements how to say "no" courteously and to retain the friendship of the inquirer, with an average rating of not less than three when evaluated on a scale of one to five (one being the highest).
- 

Subject Matter Content

Roles of senders and receivers

Learning Activities

1. Relate examples of actual situations in which you had to say "no" and still tried to keep the friendship of the other person.
  2. Divide into pairs and role play situations in which the answer would be "no." (Appendix C)
  3. Give a negative response to a letter of inquiry while retaining goodwill of the inquirer and discuss with classmates.
  4. View a film on self-expression, write a report of the important points, and present to the class for discussion.
- 

3. Given a list of sentences in class, students will identify the underlined parts of speech with at least 75 percent accuracy.
- 

Subject Matter Content

Language skills

Learning Activities

1. Write sentences illustrating the different parts of speech and give reasons for your choices to the class.
2. View a film on the parts of speech and discuss with classmates.
3. Prepare a bulletin board identifying the parts of speech.
4. Have students identify parts of speech of chosen words from magazine articles in a small group setting and present to class with explanation.

VI-5

- 
4. Given a list of incorrect sentences on a test, students will rewrite them correctly with at least 75 percent accuracy using good sentence structure, proper words, proper punctuation, and proper capitalization.
- 

Subject Matter Content

Basic language skills:

Learning Activities

1. Write a paragraph and have a peer try to find errors to reinforce the principles of basic word usage. Discuss findings in class.
2. Secure newspaper and magazine clippings in which grammatical errors are present. These are to be compiled in a scrapbook and corrections indicated. Present to the class for discussion.
3. Play the money game for students to realize their strengths and weaknesses in applying basic language skills. (Appendix D)

- 
5. After class discussion, students will be able to list on a written test seven out of ten qualities of effective business letters.
- 

Subject Matter Content

Qualities of business letters

Learning Activities

1. List and identify the ten qualities of effective business letters. Check for correctness. (Appendix E)
2. Play grab bag game by having each quality of good business letter written on slips of paper in container. Each student picks one and defines quality to remain in game. Last one left in each group is a winner.

Qualities of business letters

3. Bring in letters received in the mail and analyze with the class according to list of qualities of good business letters.
4. Play charades using blackboard to depict a quality of a good business letter while the other members guess.

- 
6. On a written test, students will be able to define seven out of ten qualities for effective business letters.
- 

Subject Matter Content

Qualities of business letters

Learning Activities

1. Grade letters brought from home according to the ten qualities. Each student will pick one to explain to peers the qualities present.
2. Write a letter ordering an article using the ten qualities. Bring a copy of letter to class for presentation so that other students may rate letter using the ten qualities for composing effective letters. Students are to be able to defend their remarks.
3. Prepare bulletin board illustrating the qualities of effective business letters.

VI-7

7. On a production test, students will be able to produce within 120 minutes three of the following business letters. Evaluation will be based on the qualities for effective business letters.
- a. Thank you letter.
  - b. Request for information
  - c. Letter of recommendation
  - d. Letter of acknowledgment
  - e. Letter of congratulations

Subject Matter Content

Learning Activities

Effective letter writing

1. Form groups and discuss the various styles for writing business letters. Select the preferred style. Be able to support selection in class.
2. Make a list of letters which might be written by persons in different careers. Compile list with peers.
3. Compose letters covering various business situations for practice. Have a peer critique them.
4. Obtain samples of as many of the types of letters as possible to present to the class.

8. Given examples in class, students will be able to prepare the following business documents: interoffice memorandums, minutes, financial records, and manuscripts with at least 75 percent accuracy.

Subject Matter Content

Learning Activities

Preparation of documents

1. Write a brief memorandum announcing a meeting of the business club. Put on overhead and have peers critique.
2. Draw up a sample memorandum form which might be used in an office. Discuss it with a peer.

Preparation of documents

3. Write a short formal report which includes the necessary parts and present to class.
4. Prepare a full-rate telegram to reserve a room for an upcoming convention. Put on overhead for discussion by peers.
5. Write a news release concerning a play to be presented by the business club. Discuss with a peer.
6. Prepare minutes of a meeting and present it to the class.

- 
9. Given a list of business-related topics, students will be able to present a three-to-five minute oral report in class. Evaluation will be based on a checklist containing good oral reporting techniques.
- 

Subject Matter Content

Preparation/presentation of documents

Learning Activities

1. Prepare a one-minute business-related talk and present it to the class. Peers will critique.
2. Write and present a three-to-five minute formal report to the class.
3. Critique short formal report of a peer. (Appendix F)
4. Prepare an agenda, an itinerary, and minutes of a meeting to be presented to class for discussion.

- 
10. Given a newspaper article to read in a group situation, students will be able to answer orally questions related to the article with at least 75 percent accuracy.
- 

Subject Matter Content

Listening and speaking skills.

Learning Activities

1. Keep a record of the listening activities in which one engages during a day.
2. List the listening activities necessary in the performance of the career to which one aspires. Review with class.
3. Listen to a 'set of directions' to a location in a nearby city without taking notes and write the instructions. Compare with classmates.
4. Present oral reports which will be taped and listen to your communication skills.
5. View a television talk show and give an oral report about one guest.

297

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Group or individual participation grades
- \* Checklist and/or rating sheet
- \* Quality of assigned tasks

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Typing Paper  
Checklists  
Business Forms  
Evaluation Sheets  
Notepads  
Instruction Sheets  
Correction Devices  
Pens  
Pencils  
Typewriters  
Dictionaries  
Typing Rulers

### Teacher

Tests and Keys to Tests  
Textbook and Manual  
Blank and Prepared Transparencies  
Cassette Player  
Checklists  
Overhead Projector  
Rating Sheets  
Transparency Pens  
Workbooks  
Blank and Prepared Forms  
Blank Cassettes  
Filmstrip Projector  
Screen  
Bulletin Board Supplies  
Typewriter  
Pens/Pencils  
Correction Devices  
Stopwatch  
Chalkboard and Supplies

## APPENDIX A

### ADVERTISING SLOGANS GAME

Directions: The teacher reads each of the following advertising slogans to the students. On a sheet of paper, students write the name of the product described by each slogan. Answers must be precise to be correct. (Note: Advertisements for local businesses, such as banks, can be used.)

1. Orange lovers have a crush on us.
2. Oh what a relief it is.
3. I didn't make dessert, instead, I made some fun.
4. Always the smallest soap in the house.
5. Gets dishes so clean, you can see yourself.
6. Cleans circles around other leading pre-washes.
7. Coffee that is good to the last drop.
8. We are working for the day when kids won't know what a cavity feels like.
9. You deserve a break today, so get up and get away.
10. Oh what a feeling to drive.
11. The taste that calls dogs to dinner.
12. The gas with guts.
13. Strong enough for a man, but made for a woman.
14. The clean, fresh, masculine scent so many women love.
15. Fly the friendly skies.
16. I'm gonna wash that grey right out of my hair.
17. When it absolutely, positively has to be there over night.
18. Don't treat your puppy like a dog.
19. Reach out and touch someone.
20. You are behind the wheel of the world's most popular car.

APPENDIX A

ANSWER KEY

1. Orange Crush
2. Alka-Seltzer
3. Jello
4. Safeguard
5. Joy
6. Clorox-Pre-Wash
7. Maxwell House
8. Crest
9. McDonald's
10. Toyota
11. Come-and-Get-Em'
12. Gulf
13. Secret
14. Old Spice
15. United Airlines
16. Loving Care
17. Federal Express
18. Puppy Chow
19. Bell Telephone
20. Ford Mustang

APPENDIX B

RUMOR GAME

The purpose of this game is to show what happens when there are too many links in the channel of communications. The teacher will read the memo given below to one student. This student will tell another student what was said in the memo. The memo will be relayed back to the class after each student has heard it.

MEMO

We have a new company policy regarding parking: All employees who drive compact cars will park in the south lot. The east side of the lot is marked "Entrance"; the west side of the lot is marked "Exit". This change is being made to prevent accidents like the one involving the truck and sports car in the north lot last month. Company trucks will continue to use the north lot.

30i

## APPENDIX C

How to say "no" without alienating the asker is very important. Write answers in which you do not "turn the inquirer off."

1. Johnny asks Terry to lend him \$5 to pay for tickets to the school play. Johnny already owes Terry \$2 which he borrowed last week for the football game. What will Terry say?
2. A retailer receives the following question, "What is the wholesale price of this tape recorder? A friend of mine says he can get me one at wholesale price, and I would like to know if I am getting a good deal." What would you tell him?
3. John asks Mary to go to the prom next month. Mary is hoping that the new boy who just moved in will ask her. What should Mary do?

## APPENDIX D

Students will be given ten play dollars at the beginning of the six weeks. As students talk or discuss in class, others will correct grammar. One who makes the correction receives a "dollar" from the student making the error. At the end of the six weeks, students having more than their original ten dollars will get an extra point for each extra dollar earned.

APPENDIX E

QUALITIES OF EFFECTIVE BUSINESS LETTERS

1. Appearance  
Does it give a good first impression?
2. Reader's viewpoint  
Show how taking desired action will benefit reader.
3. Error free  
Proofread carefully to eliminate all errors.
4. Appreciation  
Show warmth, sense of fair play.
5. Goodwill  
Does it help to establish a reputation for honest dealings from your company?
6. Clarity and completeness  
Is the message such that no one could misunderstand it?
7. Briefness  
Does it say everything necessary in the fewest possible words?
8. Cohesiveness  
Does it carry the reader's thoughts smoothly from start to finish?
9. Good paragraphing  
Is there only one main idea to each paragraph?
10. Non-technical terminology  
Avoid terms that are unfamiliar to the reader.

APPENDIX F

CHECKLIST OF ORAL REPORTING TECHNIQUES

	EXCELLENT 4	GOOD 3	FAIR 2	POOR 1	LACKING 0
Posture					
Attractive Dress and Grooming					
Enunciation					
Pronunciation					
Eye Contact					
Facial Expressions					
Use of Gestures					
Arouse Interest of Audience					
Organization of Report					
Observance of Time Limit					
Your Score					

305

## SUPPLEMENTARY MATERIALS

### Cassettes

#### The Business of Oral Communication

E956 (20 audio cassettes)

South-Western Publishing Company

11310 Gemini Lane

Dallas, TX 75229

#### Reading Comprehension

Catalog M

Learning Arts

P. O. Box 179

Wichita, KS 67201

#### Writing Friendly Letters, Business Letters, and Resumes

CV374CAF (6 cassettes and 6 worksheets)

Career Aids, Inc.

8950 Lurline Avenue

Dept. K45

Chatsworth, CA 91311

### Filmstrips with Cassettes

#### Basic Writing Skills for Everyday Life

(4 filmstrips, 4 cassettes)

Resource Manual, Worksheets, and Teacher's Guide

Learning Arts

P. O. Box 179

Wichita, KS 67201

#### Communications: Mass Media and the Public

(4 filmstrips, 4 cassettes)

Teacher's Guide

Learning Arts

P. O. Box 179

Wichita, KS 67201

#### Express Yourself: The Art of Communication

(3 filmstrips, 3 cassettes)

Teacher's Guide

Learning Arts

P. O. Box 179

Wichita, KS 67201

## Textbooks

### Business Correspondence/30

Catalog No. 22513-3  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

### Business English/30

Catalog No. 34842-1  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

### Business English and Communications

Catalog No. 61323-0  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

## Transparencies

### Can You Listen?

GV117-T (10 transparencies, lecture notes, competencies, and student activities)  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. K45  
Chatsworth, CA 91311

### Telephone Techniques

GV118-T (10 transparencies, lecture notes, competencies, and student activities).  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. K45  
Chatsworth, CA 91311

## Miscellaneous

### The Gregg Reference Manual

Catalog No. 54397-6  
Gregg McGraw Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

307

VI-20

Miscellaneous continued

Reference Manual for Office Personnel

K45 (reference manual), K451 (study guide)

South-Western Publishing Company

11310 Gemini Lane

Dallas, TX 75229

Word Division Manual

K48 (reference manual)

South-Western Publishing Company

11310 Gemini Lane

Dallas, TX 75229

## RESOURCES

- Cornwell, Robert C. and Darwin W. Manship. Applied Business Communications. Iowa: Wm. C. Brown Company, Publisher, 1978.
- Gwyn, Jack, et al. The Business of Oral Communication: Fundamentals. Cincinnati: South-Western Publishing Company, 1980.
- Gwyn, Jack, et al. The Business of Oral Communication: Selling, Speaking, Meeting. Cincinnati: South-Western Publishing Company, 1980.
- Jenkins, Evelyn. Effective Listening. California: Western Tape, 1973.
- Stewart, Marie M., et al. Business English and Communication. 5th ed. New York: McGraw-Hill Book Company, 1978.
- Stewart, Marie M., et al. Business English and Communication. 3d ed. New York: McGraw-Hill Book Company, 1967.
- Stewart, Marie M., et al. College English and Communication. 3d ed. New York: McGraw-Hill Book Company, 1975.
- Wolf, Morris P., et al. Effective Communications in Business. 7th ed. Cincinnati: South-Western Publishing Company, 1979.

309

UNIT VII  
FINANCIAL RECORDS

INTRODUCTION

Financial activities are an integral part of every business office. Therefore, this unit is designed to develop the skills necessary to process data efficiently and effectively.

Students will be given opportunities to obtain practical work experience through the use of office simulation.

COMPETENCIES

1. Develop proficiency in handling banking activities.
2. Exhibit ability to process financial statements, payroll reports, and tax returns.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Develop skills necessary for banking proficiency.
2. Process accurate financial statements.
3. Handle activities required for maintaining payroll.
4. Exhibit ability to complete tax returns.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to define a list of banking terminology with at least 75 percent accuracy.
2. On a written test, students will be able to complete three different banking forms in 50 minutes with at least 75 percent accuracy.
3. On a written test, students will be able to identify financial statements maintained in an office with at least 75 percent accuracy.
4. Given the necessary information in a classroom setting, students will be able to type financial statements with 100 percent accuracy.

5. Given the necessary information, students will be able to complete employees' payroll records on a written test with at least 75 percent accuracy.
6. Given specific data in a classroom setting, students will be able to prepare employees' payroll on a written test with at least 75 percent accuracy.
7. On a written test, students will be able to give three advantages and three disadvantages of manual and automated payroll systems.
8. On a written test, students will be able to prepare federal income tax returns with 100 percent accuracy.
9. On a written test, students will be able to prepare state income tax returns with 100 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Have students complete office simulation practice sets to gain practical work experience in processing and reporting financial activities in a classroom setting.
2. Invite local guest speakers to address the class on such topics as banking, tax returns, and social security.
3. Have students conduct a survey of area banks and compare services rendered by these institutions.
4. Have students complete the "Understanding Taxes" booklet (preparation of federal returns) which is distributed by the Internal Revenue Service.
5. Hold a federal and state return preparation center at school during lunch breaks to help the student body.
6. Hire (can pay with fake money) students to perform different types of school jobs (setting up projectors, typing, answering phones, etc.) for which they will be paid on an hourly basis. At the end of each week, students' wages and payroll are to be recorded and fake checks issued. Students will then be paid with fake money which can be used to purchase supplies from the school's store.

## METHODOLOGY

This unit has been designed to merge various individual and group activities to develop skills in handling financial records. In addition, teacher lecture will cover material not included in group activities. The instructor must use various local, state, and national agencies as resources to provide students with current information and procedures. Some of these sources are listed in the reference section of this unit.

## UNIT OUTLINE

### FINANCIAL RECORDS

#### I. Banking

- A. Emphasizing good banking procedures
- B. Maintaining a checking account
- C. Using a savings account
- D. Becoming familiar with other banking services

#### II. Financial Statements

- A. Keeping accurate financial records
- B. Typing financial statements
- C. Verifying calculations on statements

#### III. Payroll

- A. Computing wages and salaries
- B. Maintaining payroll records
- C. Computing payroll
- D. Comparing manual and automated payroll systems

#### IV. Taxes

- A. Preparing federal returns
- B. Preparing state returns

### SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. On a written test, students will be able to define a list of banking terminology with at least 75 percent accuracy.
-

Subject Matter Content

Banking terminology

Learning Activities

1. Complete the Word-Find Puzzle after reviewing banking terminology. (Appendix A)
2. Prepare a bulletin board illustrating banking terms and forms.
3. Write a report on banking services available in the community and present your findings in class.

- 
2. On a written test, students will be able to complete three different banking forms in 50 minutes with at least 75 percent accuracy.
- 

Subject Matter Content

Banking forms

Learning Activities

1. Reconcile a bank statement to prove the accuracy of a checking account.
2. Prepare checks and check stubs in payment of bills for current month and check accuracy of checkbook balance.
3. Prepare bank deposit for a merchandising business.
4. Complete necessary forms to open a business checking account.
5. Exchange work completed in the preceding activities for checking and report accuracy to individual.
6. Prepare a display illustrating the proper endorsements of checks.

- 
3. On a written test, students will be able to identify financial statements maintained in an office with at least 75 percent accuracy.
-

### Subject Matter Content

#### Financial statements

### Learning Activities

1. Prepare a display showing different types of financial statements.
2. Complete the scrambled word exercise after reviewing the financial statement terms. (Appendix B)
3. Identify from overhead transparencies financial statements and discuss the importance of each.

- 
4. Given the necessary information in a classroom setting, students will be able to type financial statements with 100 percent accuracy.
- 

### Subject Matter Content

#### Typing financial statements

### Learning Activities

1. Write a paper on the typist's responsibility in the production of final copies of financial reports and discuss in class.
2. Choose a partner and use the team method to proofread financial statements--one reads aloud from original copy while the other checks the accuracy of document. Reverse procedure and check again.
3. Record on taped media the original copy of a financial statement and check typed copy by listening to the recording as you follow on your typed copy.
4. In groups, make a list of good rules to follow in typing statements and compile a master list in class.

- 
5. Given the necessary information, students will be able to complete employees' payroll records on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Employees payroll records

1. Prepare a bulletin board on the types of payroll forms.
  2. Calculate time cards for employees and use this information to compute net pay. (Use as a group activity.) Activity could be timed.
  3. Prepare a payroll register using Activity 2 and check for accuracy.
  4. Prepare "employees earning records" using form from payroll register in Activity 3, and check for accuracy.
- 

6. Given specific data in a classroom setting, students will be able to prepare employees' payroll on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Preparing employees' payroll

1. View filmstrip on payroll and discuss in class. (See Supplementary material.)
  2. Prepare payroll change sheets using information given on payroll register sheets.
  3. Issue voucher checks for employees using information on payroll register sheet.
- 

7. On a written test, students will be able to give three advantages and three disadvantages of manual and automated payroll systems.
-

Subject Matter Content

Learning Activities

Manual and automated payroll systems

1. Research and report on manual and automated payroll systems. Report findings to the class.
2. Listen to presentation and/or view a demonstration by guest speaker on manual and automated payroll systems. Divide into groups, write advantages of each, and present to class.
3. Prepare a bulletin board comparing the two payroll systems.
4. Obtain hands-on experience by using automated office equipment supplied by local business.

- 
8. On a written test, students will be able to prepare federal income tax returns with 100 percent accuracy.
- 

Subject Matter Content

Learning Activities

Federal income tax returns

1. Listen to presentation from IRS representative.
2. Prepare a federal income tax return from personal information.
3. Complete crossword puzzle in tax booklet after reviewing tax terminology.
4. Discuss the types of itemized deductions for Form 1040 and Schedule A.
5. Prepare a Tax Form 1040 with itemized deductions and check for accuracy with key.

- 
9. On a written test, students will be able to prepare state income tax returns with 100 percent accuracy.
-

Subject Matter Content

Computing state income tax returns

Learning Activities

1. Listen to presentation from local person on state income taxes and participate in class discussion.
2. Prepare a state income tax return using your completed and corrected copy of Federal Form 1040A.
3. Determine and check in class the amount of tax owed (using tax table) from situations given on teacher-prepared transparencies.
4. Exchange completed state income tax return forms with other students and check for accuracy.

317

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Problem test
- \* Project grade
- \* Class participation grade
- \* Simulation set grade

## EQUIPMENT AND SUPPLIES

### Student

— Textbook  
Notebook  
Instruction Sheets  
Office Manuals  
Checklists  
Practice Sets  
Business Forms  
Pen  
Pencil  
Ruler  
Correction Supplies

### Teacher

Textbook and Manual  
Transparencies  
Tapes, Blank  
Transparency Pens  
Filmstrips and Films  
Bulletin Board Materials  
Construction Paper  
Wall Charts and Flip Charts  
Posters  
Banking Forms  
Payroll Forms  
Accounting Forms  
Federal and State Tax Returns  
Practice Sets and Projects  
Calculators  
Overhead Projector  
Filmstrip Projector  
Tape Recorder  
Typewriters  
Computers (if available)

APPENDIX A

WORD-FIND PUZZLE

Directions: Locate the list of banking terms in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: account, alterations, arrears, balance, bank, bank statement, blank, canceled, cash, cashiers, certified, charge, check, deduct, deposit slip, depositor, draft, drawer, forgery, full, funds, insufficient, money order, negotiable, opening, overdraft, payee, payment, personal, petty cash, premises, reconciling, remit, restrictive, signature, special, stop payment, stub, void, voucher

R E S T R I C T I V E T R O T I S O P E D R F  
 E E C M Q L Z S N O D P C A S H I E R S E O U  
 M O C H E C K P S U R P S T U G R H G G R H L  
 I J I O D K M E U C F E E C H A R G E G S P L  
 T O H E N C G C F H C R E T L A I K E J A I S  
 G L F A L C N I F E K S Y J T B P R P Y R T C  
 D R A F T M I A I R B O A C O Y Y U M L U T E  
 B L A N K E N L C N F N P M A U C E T V M A R  
 J A C M H S E G I A B A D N E C N A L A B R T  
 I N N K L T P C E N E L Q T O T R P S U W R I  
 P E M K D U O F N E G O T I A B L E T H R E F  
 V O I D E B A L T E R A T I O N S C S A Q A I  
 N T F A R D R E V O G R F U N D S T S B P R E  
 R E D R O Y E N O M P F S E R U T A N G I S D  
 S T O P P A Y M E N T H U E V D A C C O U N T  
 O K H S A C J Z I D E P O S I T S L I P N O M  
 B A N K S T A T E M E N T L W S E S I M E R P  
 D E L E C N A C R D E D U C T S R E W A R D E

APPENDIX B

SCRAMBLED WORDS

Directions: Unscramble the words, find the hidden banking terms, and place in the blank provided.

- |                      |           |
|----------------------|-----------|
| 1. LNEBAAC EETHS     | 1. _____  |
| 2. IBLITESILIA       | 2. _____  |
| 3. PTCLAIA           | 3. _____  |
| 4. PTLCAIA MTTNTESEA | 4. _____  |
| 5. ENT SOLS          | 5. _____  |
| 6. STAESS            | 6. _____  |
| 7. CLFASI DIEPOR     | 7. _____  |
| 8. NOEICM AEETSTTMN  | 8. _____  |
| 9. ETN OITFRP        | 9. _____  |
| 10. AIQUOET          | 10. _____ |

Answers: 1. balance sheet 2. liabilities 3. capital 4. capital statement 5. net loss 6. assets 7. fiscal period 8. income statement 9. net profit 10. equation

APPENDIX A

WORD-FIND PUZZLE ANSWER KEY

Directions: Locate the list of banking terms in the puzzle given below. Words can be found horizontally, vertically, or diagonally.

WORD LIST: account, alterations, arrears, balance, bank, bank statement, blank, canceled, cash, cashiers, certified, charge, check, deduct, deposit slip, depositor, draft, drawer, forgery, full, funds, insufficient, money order, negotiable, opening, overdraft, payee, payment, personal, petty cash, premises, reconciling, remit, restrictive, signature, special, stop payment, stub, void, voucher

R	E	S	T	R	I	C	T	I	V	E	T	R	O	T	I	S	O	P	E	D	R	E
E	E	C	M	Q	L	Z	S	N	O	P	C	A	S	H	I	E	R	S	E	O	U	
M	O	C	H	E	C	K	P	S	U	R	P	S	T	U	G	R	H	G	G	R	H	L
I	J	I	O	D	K	M	E	U	C	F	E	E	C	H	A	R	G	E	G	S	P	L
T	O	H	E	N	C	G	C	F	H	C	R	E	T	L	A	I	K	E	J	A	I	S
G	L	F	A	L	C	N	I	F	E	K	S	Y	J	T	B	P	R	P	Y	R	T	C
D	R	A	F	T	M	I	A	I	R	B	O	A	C	O	Y	Y	U	M	L	U	T	E
B	L	A	N	K	E	N	L	C	N	F	N	P	M	A	U	C	E	T	V	M	A	R
J	A	C	M	H	S	E	G	I	A	B	A	D	N	E	C	N	A	L	A	B	R	T
I	N	N	K	L	T	P	C	E	N	E	L	Q	T	O	T	R	P	S	U	W	R	I
P	E	M	K	D	U	O	F	N	E	G	O	T	I	A	B	L	E	T	H	R	E	F
V	O	I	D	E	B	A	L	T	E	R	A	T	I	O	N	S	C	S	A	Q	A	I
N	T	F	A	R	D	R	E	V	O	G	R	F	U	N	D	S	T	S	B	P	R	E
R	E	D	R	O	Y	E	N	O	M	P	F	S	E	R	U	T	A	N	G	I	S	D
S	T	O	P	P	A	Y	M	E	N	T	H	U	E	V	D	A	C	C	O	U	N	T
O	K	H	S	A	C	J	Z	I	D	E	P	O	S	I	T	S	L	I	P	N	O	M
B	A	N	K	S	T	A	T	E	M	E	N	T	L	W	S	E	S	I	M	E	R	P
D	E	L	E	C	N	A	C	R	D	E	D	U	C	T	S	R	E	W	A	R	D	E

SUPPLEMENTARY MATERIALS

Filmstrips with Cassettes

All About Banking

4 cassettes; 4 filmstrips, 1975  
Learning Arts  
Box 179  
Wichita, KS 67201

Banking, Financing, and Budgeting

4 cassettes; 4 filmstrips  
Learning Arts  
Box 179  
Wichita, KS 67201

Financial Statements Explained

5 cassettes; 5 filmstrips, 1979  
Learning Arts  
Box 179  
Wichita, KS 67201

Income Tax

3 cassettes; 5 filmstrips  
Learning Arts  
Box 179  
Wichita, KS 67201

A Job-Training/Office Simulation Approach to Record Keeping

Sound Filmstrip with cassette (13236-4)  
Cotton, L. Joseph, Judith Lima, and Donald Koeppen, 1976.  
Gregg McGraw-Hill  
P. O. Box 996  
Norcross, GA 30091

Money Management Series

11 cassettes; 11 filmstrips  
Learning Arts  
Box 179  
Wichita, KS 67201

What Is in a Paycheck?

1 cassette; 1 filmstrip  
Learning Arts  
Box 179  
Wichita, KS 67201

## Practice and Simulation Sets

### Business Simulation

Gregory, James Co.  
Seventh Edition, Caldwell, G145  
South-Western Publishing Co.  
11310 Gemini Lane  
Dallas, TX 75229

### Clerical Payroll Procedures

Fuller, Eighth Edition, K52  
South-Western Publishing Co.  
11310 Gemini Lane  
Dallas, TX 75229

### Personal Record Keeping Practice Set

Wood, 1976 (71621-8)  
Gregg McGraw-Hill  
P. O. Box 996  
Norcross, GA 30091

### Practical Record Keeping Practice Set

Fifth Edition, Baggett, B055  
South-Western Publishing Co.  
11310 Gemini Lane  
Dallas, TX 75229

### Projects In Clerical Record Keeping

Rosenberg, Fourth Edition, K28  
K283 Restaurant Records, Reports and Payroll  
K285 Payroll Records  
South-Western Publishing Co.  
11310 Gemini Lane  
Dallas, TX 75229

### Village Garden Center Business Simulation Set

B245, Pegboard Payroll System  
South-Western Publishing Co.  
11310 Gemini Lane  
Dallas, TX 75229

## Textbooks

### Clerical and Related Occupations

1970  
West Virginia State Board of Education  
Bureau of Vocational, Technical, and Adult Education  
Charleston, WV 25300

General Record Keeping

1976.

Gregg McGraw-Hill Company.

P. O. Box 996

Norcross, GA 30091

Payroll Record Keeping

1965

Gregg McGraw-Hill Company

P. O. Box 996

Norcross, GA 30091

Payroll Systems and Procedures

1970

Gregg McGraw-Hill Company

P. O. Box 996

Norcross, GA 30091

Practical Record Keeping

1975

South-Western Publishing Co.

11310 Gemini Lane

Dallas, TX 75229

## RESOURCES

"Bookkeeping/Accounting/Payroll Clerk." State of Alabama, Department of Education, 1978.

Cooperative Office Education Curriculum Guidelines. State of Louisiana, Department of Education. Bulletin No. 1246, 1974.

Curriculum Guides for Business and Office Education. Louisiana State Department of Education, 1974.

Pasewark, Williams R. and Mary Ellen Oliverio. Clerical Office Procedures. Cincinnati: South-Western Publishing Company, 1978.

Stewart, Jeffery R., Jr., et al. Office Procedures. Dallas: McGraw-Hill Book Company, 1980.

"Understanding Taxes, 1982." Department of the Treasury, Internal Revenue Service, Publication 21.

325

UNIT VIII  
BUSINESS MATH/MACHINES

INTRODUCTION

Mastery of basic math is recognized as an important basic skill for success in the business world. This unit allows the students to become familiar with the various problems of the business world and to learn to compute accurate answers using both mental and machine calculations.

The students will be given activities to reinforce their mathematical skills and opportunities to apply those skills when using calculating machines to solve basic business problems.

COMPETENCIES

1. Perform basic math processes with emphasis on speed, accuracy, and neatness.
2. Develop techniques and skills necessary for employment using calculating machines.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate proficiency in the four fundamental math operations as applied to whole, fractional, and decimal numbers.
2. Utilize percent to solve problems.
3. Demonstrate the proper use of calculating machines.
4. Solve business problems using calculating machines.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given 25 problems involving all math functions with whole numbers, students will be able to compute the answers on a written test with at least 75 percent accuracy.

2. Given 25 problems involving all math functions with fractions, students will be able to compute the answers on a written test with at least 75 percent accuracy.
3. Given 25 problems involving all math functions with decimals, students will be able to compute the answers on a written test with at least 75 percent accuracy.
4. Given 25 problems using percentages, students will be able to compute the answers on a written test with at least 75 percent accuracy.
5. Given an illustration of a calculating machine, students will be able to identify the parts of the machine and the function of each in class with at least 75 percent accuracy.
6. Given a calculating machine and problems, students will be able to demonstrate the proper touch control techniques on a 20-minute test with at least 75 percent accuracy.
7. Given a sales commissions report, sales slip, invoice, and a payroll register, students will be able to complete each form in class using a calculating machine with at least 75 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Give a pre-test to determine the students' mathematical competencies and weaknesses.
2. Invite a representative from a local office equipment firm to demonstrate operation and use of various machines.

#### METHODOLOGY

This unit has been designed to build mathematical skills and develop proficiency on calculating machines. Instruction will include demonstrations, observations, visual aids, job instruction sheets, timed drills, and tests.

UNIT OUTLINE  
BUSINESS MATH/MACHINES

I. Basic Arithmetic Skills Review--All Math Functions

- A. Whole numbers
- B. Fractions
- C. Decimals
- D. Percent

II. Adding/Calculating Machines

- A. Machine operation/maintenance
- B. Touch control techniques
- C. Machine use

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given 25 problems involving all math functions with whole numbers, students will be able to compute the answers on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Whole numbers

Learning Activities

1. Match the words associated with whole numbers to the correct definitions. (Appendix A)
2. Give the place value of each digit in a six-digit number. (Appendix B)
3. Round numbers to the nearest 10's, 100's, and 1000's. (Appendix C)
4. Solve problems involving addition and subtraction of whole numbers. (Appendix D)
5. Solve problems involving the multiplication and division of whole numbers. (Appendix E).

- 
2. Given 25 problems involving all math functions with fractions, students will be able to compute the answers on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Fractions

Learning Activities

1. Identify the numerator and the denominator of each given fraction and classify fractions as proper, improper, or mixed. (Appendix F)
  2. Write equivalent fractions for the fractions given. (Appendix G)
  3. Reduce fractions to lowest terms, convert mixed numbers to improper fractions, and convert improper fractions to mixed numbers or whole numbers. (Appendix H)
  4. Find the sums, differences, products, and quotients, reducing all answers to lowest terms. (Appendix I)
- 

3. Given 25 problems involving all math functions with decimals, students will be able to compute the answers on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Decimals

Learning Activities

1. Identify the place value of each digit in a numeral with six decimal places. (Appendix J)
2. Round decimals to the nearest whole number, tenth, hundredth, or thousandth. (Appendix K)
3. Find the sums, differences, products, and quotients, placing the decimal points in the correct position in the answers. (Appendix L)
4. Multiply and divide by 10, 100, and 1,000. (Appendix M)

- 
4. Given 25 problems using percentages, students will be able to compute the answers on a written test with at least 75 percent accuracy.
- 

Subject Matter Content

Percents

Learning Activities

1. Write percents as decimals, decimals as percents, and percents as fractions. (Appendix N)
  2. Compute the amount of interest on a loan using the simple interest formula. (Appendix O)
  3. Find the amount expended for each item in a family budget. (Appendix P)
- 

5. Given an illustration of a calculating machine, students will be able to identify the parts of the machine and the function of each in class with at least 75 percent accuracy.
- 

Subject Matter Content

Machine operation/  
maintenance

Learning Activities

1. Identify the machine parts on the illustration provided. Teacher will provide illustration of machine used.
2. Match each machine part with its function. Teacher will provide illustration of machine used.
3. List the work habits desired for efficient machine operation. Compile class list from individual lists.
4. Demonstrate correct ribbon replacement and paper roll replacement on machine provided.

- 
6. Given a calculating machine and problems, students will be able to demonstrate the proper touch control techniques on a 20-minute test with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Touch control techniques.

1. Practice reaches using the touch-control techniques.
2. Prepare a bulletin board showing correct touch techniques.
3. Demonstrate the proper touch control techniques. (Appendix Q)

- 
7. Given a sales commissions report, sales slip, invoice, and a payroll register, students will be able to complete each form in class using a calculating machine with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Machine use

1. Complete printed business forms.
2. Proofread completed forms.
3. Prepare a bulletin board using various business forms.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Accuracy of daily work
- \* Timed drills
- \* Touch techniques

## EQUIPMENT AND SUPPLIES

### Student

Adding/Printing Machine  
Tape  
Pen/Pencil  
Text/Workbook  
Machine Instructional  
Manual  
Checklist  
Calculating Machine  
Practice Set  
Machine Ribbons  
Activity Sheets  
Current Tax Tables

### Teacher

Calculating Machine  
Machine Ribbons  
Adding/Printing Machine Tape  
Films  
Film Projector  
Transparencies  
Transparency Pens  
Overhead Projector  
Practice Set  
Timer and/or Stop Watch  
Texts and Instructional Manuals  
Checklist  
Activity Sheets  
Bulletin Board Supplies  
Current Tax Tables

APPENDIX. A.

WHOLE NUMBERS

Name \_\_\_\_\_ Score \_\_\_\_\_

Match the correct definitions to the terms on the right. Write the appropriate numbers in the blanks.

- |   |                  |
|---|------------------|
| _____ a. Numbers may be expressed by any one of the ten symbols, 0 to 9 | 1. Addends       |
| _____ b. Numbers that are added together                                | 2. Difference    |
| _____ c. Numbers that are multiplied                                    | 3. Digit         |
| _____ d. Answer to a multiplication problem                             | 4. Dividend      |
| _____ e. Number that is being subtracted from another number            | 5. Divisor       |
| _____ f. Number by which you divide                                     | 6. Factors       |
| _____ g. Answer to an addition problem                                  | 7. Minuend       |
| _____ h. Number from which another number is subtracted                 | 8. Product       |
| _____ i. Answer to a subtraction problem                                | 9. Quotient      |
| _____ j. Answer to a division problem                                   | 10. Remainder    |
| _____ k. Number which is left over when division is completed           | 11. Subtrahend   |
| _____ l. Number to be divided   | 12. Sum or total |

APPENDIX B  
WHOLE NUMBERS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. Name the place values in the number 623,412.

- a. 6 -- \_\_\_\_\_
- b. 2 -- \_\_\_\_\_
- c. 3 -- \_\_\_\_\_
- d. 4 -- \_\_\_\_\_
- e. 1 -- \_\_\_\_\_
- f. 2 -- \_\_\_\_\_

II. Use the numeral 758,216,934 to complete the following exercise.

- a. Which digit is in hundred's place? \_\_\_\_\_
- b. Which digit is in ten's place? \_\_\_\_\_
- c. Which digit is in one's place? \_\_\_\_\_
- d. Which digit is in ten thousand's place? \_\_\_\_\_
- e. Which digit is in thousand's place? \_\_\_\_\_
- f. Which digit is in million's place? \_\_\_\_\_
- g. Which digit is in ten million's place? \_\_\_\_\_
- h. Which digit is in hundred thousand's place? \_\_\_\_\_
- i. Which digit is in hundred million's place? \_\_\_\_\_

III. Write the place value of each 2 in the following numerals.

- a. 134,527 \_\_\_\_\_
- b. 926,473 \_\_\_\_\_
- c. 2,704 \_\_\_\_\_
- d. 1,247,658 \_\_\_\_\_
- e. 3,675,402 \_\_\_\_\_
- f. 21,701,390 \_\_\_\_\_
- g. 7,329,648 \_\_\_\_\_
- h. 39,077,201 \_\_\_\_\_

APPENDIX C

WHOLE NUMBERS

I. Round to the nearest ten.

- |            |              |
|------------|--------------|
| a. 93 =    | f. 4,958 =   |
| b. 590 =   | g. 23 =      |
| c. 9,360 = | h. 907 =     |
| d. 475 =   | i. 678,345 = |
| e. 468 =   | j. 92,177 =  |

II. Round to the nearest hundred.

- |            |            |
|------------|------------|
| a. 459 =   | f. 234 =   |
| b. 8,910 = | g. 337 =   |
| c. 945 =   | h. 4,685 = |
| d. 429 =   | i. 6,793 = |
| e. 5,923 = | j. 933 =   |

III. Round to the nearest thousand.

- |              |             |
|--------------|-------------|
| a. 4,780 =   | f. 52,905 = |
| b. 5,653 =   | g. 2,469 =  |
| c. 9,023 =   | h. 44,689 = |
| d. 23,567 =  | i. 20,890 = |
| e. 178,538 = | j. 29,789 = |

APPENDIX D

I. Complete the following sales budget record - addition.

SALES BUDGET FOR PERIOD JAN-JUN.							
BY DEPARTMENT							
DEPT.	JAN.	FEB.	MARCH	APR.	MAY	JUNE	TOTAL
1	1,100	2,000	2,300	2,025	1,000	2,200	
2	2,700	2,100	3,000	2,700	1,100	2,500	
3	1,800	3,200	1,200	3,650	2,550	1,500	
4	3,100	2,200	1,600	1,975	2,500	3,500	
TOTALS							

II. Complete the following problems dealing with subtraction.

- a. 
$$\begin{array}{r} 10,199 \\ - 9,995 \\ \hline \end{array}$$
- b. 
$$\begin{array}{r} 84,576 \\ - 3,989 \\ \hline \end{array}$$
- c. 
$$\begin{array}{r} 1,046 \\ - 659 \\ \hline \end{array}$$
- d. 
$$\begin{array}{r} 622 \\ - 555 \\ \hline \end{array}$$
- e. 
$$\begin{array}{r} 49 \\ - 37 \\ \hline \end{array}$$
- f. 
$$\begin{array}{r} 19,000 \\ - 18,889 \\ \hline \end{array}$$
- g. 
$$\begin{array}{r} 73,681 \\ - 32,492 \\ \hline \end{array}$$
- h. 
$$\begin{array}{r} 2,255 \\ - 1,939 \\ \hline \end{array}$$
- i. 
$$\begin{array}{r} 329 \\ - 251 \\ \hline \end{array}$$
- j. 
$$\begin{array}{r} 85 \\ - 68 \\ \hline \end{array}$$

## APPENDIX E

### I. Multiplication of whole number:

What is the product of each of the following problems?

a.  $34 \times 4 =$  \_\_\_\_\_      b.  $12 \times 5 =$  \_\_\_\_\_      c.  $9 \times 9 =$  \_\_\_\_\_

d.  $33 \times 16 =$  \_\_\_\_\_      e.  $15 \times 5 =$  \_\_\_\_\_      f.  $3 \times 20 =$  \_\_\_\_\_

g.  $3 \times 9 =$  \_\_\_\_\_      h.  $4 \times 4 =$  \_\_\_\_\_      i.  $8 \times 8 =$  \_\_\_\_\_

### II. Division of whole number:

Find the quotient in each problem.

a.  $\frac{340}{20} =$  \_\_\_\_\_      b.  $\frac{462}{33} =$  \_\_\_\_\_      c.  $\frac{783}{87} =$  \_\_\_\_\_

d.  $\frac{418}{11} =$  \_\_\_\_\_      e.  $\frac{220}{22} =$  \_\_\_\_\_      f.  $\frac{850}{17} =$  \_\_\_\_\_

g.  $\frac{48}{8} =$  \_\_\_\_\_      h.  $\frac{500}{25} =$  \_\_\_\_\_      i.  $\frac{18}{6} =$  \_\_\_\_\_

j.  $\frac{105}{5} =$  \_\_\_\_\_      k.  $\frac{400}{80} =$  \_\_\_\_\_

APPENDIX F

FRACTIONS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. In the following fractions identify the numerator and the denominator of each by filling in the blanks.

- a. In the fraction  $\frac{3}{4}$ , the numerator is \_\_\_\_\_ and the denominator is \_\_\_\_\_.
- b. In the fraction  $\frac{1}{2}$ , the numerator is \_\_\_\_\_ and the denominator is \_\_\_\_\_.

II. Write fractions that fit the following statements.

- a. A fraction with a denominator of 15 and a numerator of 2. \_\_\_\_\_
- b. A fraction with a numerator of 13 and a denominator of 35. \_\_\_\_\_

III. A boy cuts a pie into 8 equal pieces and then gives his friend 1 of the 8 pieces.

- a. Which number represents the numerator? \_\_\_\_\_
- b. Which number represents the denominator? \_\_\_\_\_
- c. What fractional part of the pie did the boy give away? \_\_\_\_\_

IV. Identify the following numbers by placing "P" for proper fraction, "I" for the improper fraction, or "M" for mixed number in the blanks.

- |                         |                          |
|-------------------------|--------------------------|
| _____ a. $\frac{3}{4}$  | _____ e. $\frac{4}{4}$   |
| _____ b. $\frac{1}{4}$  | _____ f. $8 \frac{1}{3}$ |
| _____ c. $\frac{1}{1}$  | _____ g. $9 \frac{3}{3}$ |
| _____ d. $\frac{16}{2}$ | _____ h. $\frac{7}{3}$   |

APPENDIX G

FRACTIONS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. Write four different fractions that are equivalent to the number one.

a. \_\_\_\_\_

c. \_\_\_\_\_

b. \_\_\_\_\_

d. \_\_\_\_\_

II. Write two different equivalent fractions for the fractions given.

a.  $1/2 =$  \_\_\_\_\_

d.  $1/4 =$  \_\_\_\_\_

b.  $2/5 =$  \_\_\_\_\_

e.  $1/3 =$  \_\_\_\_\_

c.  $4/5 =$  \_\_\_\_\_

f.  $3/8 =$  \_\_\_\_\_

III. Write each of the following equivalent fractions as indicated.

a.  $2/3 =$  \_\_\_\_\_ / 18

d.  $1/5 =$  \_\_\_\_\_ / 30

b.  $1/8 =$  \_\_\_\_\_ / 24

e.  $2/7 =$  \_\_\_\_\_ / 21

c.  $2/10 =$  \_\_\_\_\_ / 40

f.  $7/9 =$  \_\_\_\_\_ / 81

APPENDIX H-

FRACTIONS

I. Reduce each fraction to its lowest term.

a.  $\frac{10}{12}$  \_\_\_\_\_

d.  $\frac{8}{12}$  \_\_\_\_\_

b.  $\frac{9}{15}$  \_\_\_\_\_

e.  $\frac{6}{9}$  \_\_\_\_\_

c.  $\frac{28}{48}$  \_\_\_\_\_

f.  $\frac{35}{49}$  \_\_\_\_\_

II. Change each improper fraction to a mixed number.

a.  $\frac{13}{7}$  \_\_\_\_\_

d.  $\frac{21}{8}$  \_\_\_\_\_

b.  $\frac{26}{12}$  \_\_\_\_\_

e.  $\frac{47}{15}$  \_\_\_\_\_

c.  $\frac{62}{23}$  \_\_\_\_\_

f.  $\frac{48}{16}$  \_\_\_\_\_

III. Change each mixed number to an improper fraction.

a.  $3\frac{2}{3}$  \_\_\_\_\_

d.  $12\frac{1}{2}$  \_\_\_\_\_

b.  $8\frac{3}{4}$  \_\_\_\_\_

e.  $21\frac{3}{5}$  \_\_\_\_\_

c.  $6\frac{5}{6}$  \_\_\_\_\_

f.  $14\frac{7}{8}$  \_\_\_\_\_

APPENDIX I

Name \_\_\_\_\_

Score \_\_\_\_\_

Compute the following problems. Express your answers in lowest terms.

a. 
$$\begin{array}{r} \frac{3}{8} \\ - \frac{1}{3} \\ \hline \end{array}$$

b. 
$$\begin{array}{r} \frac{2}{3} \\ + \frac{3}{4} \\ \hline \end{array}$$

c. 
$$\begin{array}{r} 2\frac{1}{2} \\ - 1\frac{3}{4} \\ \hline \end{array}$$

d. 
$$\begin{array}{r} 3\frac{2}{5} \\ + 1\frac{1}{2} \\ \hline \end{array}$$

e.  $1\frac{1}{2} \times \frac{3}{4} =$

f. 
$$\frac{2\frac{1}{14}}{1\frac{1}{2}} =$$

g. 
$$\begin{array}{r} \frac{7}{8} \\ - \frac{1}{3} \\ \hline \end{array}$$

h. 
$$\begin{array}{r} \frac{3}{5} \\ + \frac{3}{4} \\ \hline \end{array}$$

i. 
$$\begin{array}{r} 3\frac{1}{3} \\ - 2\frac{3}{4} \\ \hline \end{array}$$

j. 
$$\begin{array}{r} 2\frac{1}{7} \\ + 5\frac{2}{5} \\ \hline \end{array}$$

k.  $6\frac{7}{8} \times \frac{1}{5} =$

l. 
$$\frac{\frac{1}{3}}{\frac{5}{8}} =$$

## APPENDIX J

## DECIMALS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. Write the place value of each of the digits in 0.867293.

- a. 3 = \_\_\_\_\_
- b. 9 = \_\_\_\_\_
- c. 2 = \_\_\_\_\_
- d. 7 = \_\_\_\_\_
- e. 6 = \_\_\_\_\_
- f. 8 = \_\_\_\_\_

II. Complete the following statements.

EXAMPLE: In the number 0.587613, 5 means 5 tenths

- a. In the number 0.587613, 8 means 8 \_\_\_\_\_
- b. In the number 0.587613, 7 means 7 \_\_\_\_\_
- c. In the number 0.587613, 6 means 6 \_\_\_\_\_
- d. In the number 0.587613, 1 means 1 \_\_\_\_\_
- e. In the number 0.587613, 3 means 3 \_\_\_\_\_

## APPENDIX K

## DECIMALS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. Round the following decimals to the nearest whole number.

a.  $5.8 =$

d.  $2.50395 =$

b.  $1.5 =$

e.  $43.219 =$

c.  $43.51 =$

f.  $344.61 =$

II. Round the following decimals to the nearest tenth.

a.  $3.12 =$

d.  $15.24 =$

b.  $33.32 =$

e.  $34.33 =$

c.  $1.61 =$

f.  $3.72 =$

III. Round the following decimals to the nearest hundredth.

a.  $1.346 =$

d.  $345.697 =$

b.  $23.995 =$

e.  $55.9356 =$

c.  $9.0378 =$

f.  $77.893 =$

IV. Round the following decimals to the nearest thousandth.

a.  $0.6790 =$

d.  $3.6932 =$

b.  $12.9903 =$

e.  $678.3590 =$

c.  $332.69403 =$

f.  $59.33092 =$

## APPENDIX L

## DECIMALS

Name \_\_\_\_\_ Score \_\_\_\_\_

I. Add the following decimals, locating the decimal points in the sums or totals.

a.  $2.7 + 4.8 =$

d. 
$$\begin{array}{r} 2.5 \\ + 29 \\ \hline \end{array}$$

e. 
$$\begin{array}{r} 43.0901 \\ + 7.25 \\ \hline \end{array}$$

b.  $937 + 0.066 =$

c.  $478 + 41.801 =$

II. Subtract the following decimals, locating the decimal points in the difference.

a.  $379 - 4.57 =$

d.  $490.25 - 8.3301 =$

b.  $.56 - .0123 =$

e.  $1.098 - .653 =$

c.  $53.69 - 2.54 =$

f.  $23 - .25 =$

III. Multiply the following decimals, locating the decimal points in the products.

a.  $2.57 \times 83 =$

d.  $34.02 \times 44.23 =$

b.  $.019 \times 24.3 =$

e.  $678 \times .25 =$

c.  $51.790 \times 4.32 =$

f.  $33 \times 8.90 =$

IV. Divide the following decimals by decimals, locating the decimal points in the quotients.

a.  $0.2 \overline{) 5.3301}$

d.  $3.2 \overline{) 34.562}$

b.  $3.255 \overline{) 5689.1}$

e.  $35.1 \overline{) 923014}$

c.  $55.1 \overline{) 3156.902}$

f.  $22.2 \overline{) 45709.12}$

## APPENDIX M

## DECIMALS

Name \_\_\_\_\_ Score \_\_\_\_\_

## I. Multiply these problems.

a. 
$$\begin{array}{r} 354 \\ \times 10 \\ \hline \end{array}$$

b. 
$$\begin{array}{r} 34.5241 \\ \times 100 \\ \hline \end{array}$$

c. 
$$\begin{array}{r} 34.913 \\ \times 100 \\ \hline \end{array}$$

d. 
$$\begin{array}{r} 5198.7 \\ \times 100 \\ \hline \end{array}$$

e. 
$$\begin{array}{r} 459.235 \\ \times 100 \\ \hline \end{array}$$

f. 
$$\begin{array}{r} 0.00678 \\ \times 1000 \\ \hline \end{array}$$

## II. Divide these problems.

a. 
$$\frac{298}{10} =$$

b. 
$$\frac{4.901}{100} =$$

c. 
$$\frac{4509}{1000} =$$

d. 
$$\frac{590123}{1000} =$$

e. 
$$\frac{65.19}{10} =$$

f. 
$$\frac{45.08}{100} =$$

APPENDIX N

PERCENT

I. Write each percent as a decimal.

a. 67% \_\_\_\_\_

d. 125% \_\_\_\_\_

b. 15% \_\_\_\_\_

e. 82% \_\_\_\_\_

c. 8% \_\_\_\_\_

f. 6.2% \_\_\_\_\_

II. Write each decimal as a percent.

a. .42 \_\_\_\_\_

d. 1.03 \_\_\_\_\_

b. .02 \_\_\_\_\_

e. .007 \_\_\_\_\_

c. .89 \_\_\_\_\_

f. .9 \_\_\_\_\_

III. Write each percent as a fraction.

a. 15% \_\_\_\_\_

d. 5% \_\_\_\_\_

b. 65% \_\_\_\_\_

e. 20% \_\_\_\_\_

c. 120% \_\_\_\_\_

f.  $12\frac{1}{2}\%$  \_\_\_\_\_

IV. Write each fraction as a percent.

a.  $\frac{1}{4}$  \_\_\_\_\_

d.  $\frac{7}{8}$  \_\_\_\_\_

b.  $\frac{5}{8}$  \_\_\_\_\_

e.  $\frac{1}{2}$  \_\_\_\_\_

c.  $\frac{2}{3}$  \_\_\_\_\_

f.  $\frac{5}{6}$  \_\_\_\_\_

APPENDIX O  
SIMPLE INTEREST

Problem 1. Using the simple interest formula:

$$\text{Interest} = \text{Principal} \times \text{Rate} \times \text{Time (Years)}$$

find the interest on a \$1,200 loan for 8 months at an interest rate of 6%.

Solution:  $I = P \times R \times T$

$$I = \$1,200 \times \underline{\quad\quad\quad} \% \times \frac{\quad\quad}{12}$$

$$I = \underline{\quad\quad\quad}$$

Problem 2. When the time is shown in days, consider each month to have 30 days, with a total of 360 days in a year. Find the interest on a \$1,200 loan made on July 6 and due on September 16, with interest at 6%.

Solution:  $I = P \times R \times T$

Length of time =  $\underline{\quad\quad\quad}$  days

$$I = \$ \underline{\quad\quad\quad} \times \underline{\quad\quad\quad} \% \times \frac{\quad\quad}{360}$$

$$I = \underline{\quad\quad\quad}$$

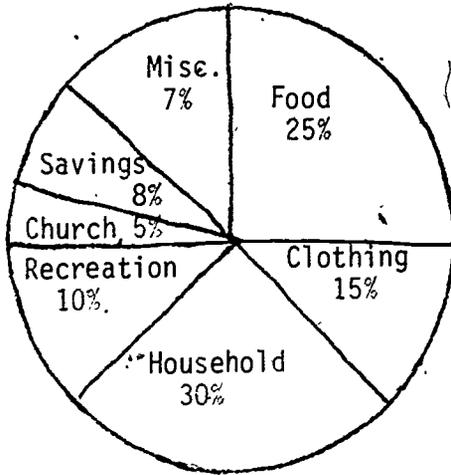
Problem 3. Fill in the chart below.

	Principal	Rate	Time	Interest
1.	\$2,400	6%	240 days	
2.	\$1,500	8%	90 days	
3.	\$1,800	10%	9 mo.	
4.	\$3,600	7½%	10 mo.	
5.	\$1,400	5%	May 10 to Nov. 6	

APPENDIX P

FAMILY BUDGET

- I. Jim Mann's net earnings for the month are \$1,200. The chart below shows his expenditures for the month. Find the amount spent for each item on the chart.



- a. Household \$ \_\_\_\_\_
- b. Food \$ \_\_\_\_\_
- c. Clothing \$ \_\_\_\_\_
- d. Savings \$ \_\_\_\_\_
- e. Recreation \$ \_\_\_\_\_
- f. Church \$ \_\_\_\_\_
- g. Miscellaneous \$ \_\_\_\_\_

- II. Mary Smith receives \$150 a month for her college expenses. The list below shows how she will spend her money this month. Find what percent she has budgeted for each item.

- a. Books \$24 or \_\_\_\_\_%
- b. Clothes \$50 or \_\_\_\_\_%
- c. Recreation \$25 or \_\_\_\_\_%
- d. Miscellaneous \$30 or \_\_\_\_\_%
- e. Savings \$21 or \_\_\_\_\_%

APPENDIX Q

CHECKLIST FOR TOUCH-CONTROL TECHNIQUES

Name of Student \_\_\_\_\_ Date \_\_\_\_\_

	Excellent	Strong	Average	Weak	Poor
1. Knowledge of keyboard					
2. Relaxed position in front of machine					
3. Feet on the floor					
4. Fingers well curved					
5. Correct home-row position					
6. Finger-reach with fingers close to keys					
7. Hands, wrists, and arms relaxed					
8. Uniform key-stroking					
9. Keys struck with correct finger					
10. Instant key release					
11. Eyes on copy					
12. Speed potential					
13. Accuracy potential					
14. Work habits					
15. Arrangement of materials					
16. Follows directions					
17. Rhythm pattern continuous					
18. Strives for improvement					
19. Concentrates on copy					
20. Practices with purpose					

ANSWER KEY  
APPENDICES A, B, AND C

APPENDIX A

a. 3	d. 8	g. 12	j. 9
b. 1	e. 11	h. 7	k. 10
c. 6	f. 5	i. 2	l. 4

APPENDIX B

Part I

a. 6 -- hundred thousands	c. 3 -- thousands	e. 1 -- tens
b. 2 -- ten thousands	d. 4 -- hundreds	f. 2 -- ones

Part II

a. 9	d. 1	g. 5
b. 3	e. 6	h. 2
c. 4	f. 8	i. 7

Part III

a. tens	e. ones
b. ten thousands	f. ten millions
c. thousands	g. ten thousands
d. hundred thousands	h. hundreds

APPENDIX C

Part I

a. 9	d. 48	g. 2	j. 9,218
b. 59	e. 47	h. 91	
c. 936	f. 496	i. 67,835	

Part II

a. 500	d. 400	g. 300	j. 900
b. 8,900	e. 5,900	h. 4,700	
c. 900	f. 200	i. 6,800	

Part III

a. 5,000	d. 24,000	g. 2,000	j. 30,000
b. 6,000	e. 179,000	h. 45,000	
c. 9,000	f. 53,000	i. 21,000	

ANSWER KEY

APPENDICES D AND E

APPENDIX D

Part I

Totals -- across

Dept. 1 10,625

Dept. 2 14,100

Dept. 3 13,900

Dept. 4 14,875

Totals -- down

Jan. 8,700

Feb. 9,500

March 8,100

Apr. 10,350

May 7,150

June 9,700

Grand total -- \$53,500

Part II

a. 204

b. 80,587

c. 387

d. 67

e. 12

f. 111

g. 41,189

h. 316

i. 78

j. 17

APPENDIX E

Part I

a. 136

b. 60

c. 81

d. 528

e. 75

f. 60

g. 27

h. 16

i. 64

Part II

a. 17

b. 14

c. 9

d. 38

e. 10

f. 50

g. 6

h. 20

i. 3

j. 21

k. 5

ANSWER KEY  
APPENDICES F AND G.

APPENDIX F

Part I

a. 3,4

b. 1,2

Part II

a. 2/15

b. 13/35

Part III

a. 1

b. 8

c. 1/8

Part IV

a. P

c. I

e. I

g. M

b. P

d. I

f. M

h. I

APPENDIX G

Part I.

a. 2/2

b. 3/3

c. 4/4

d. 5/5

Part II

a. 2/4, 3/6

c. 8/10, 12/15

e. 2/6, 3/9

b. 4/10, 6/15

d. 2/8, 3/12

f. 6/16, 9/24

Part III

a. 12/18

c. 8/40

e. 6/21

b. 3/24

d. 6/30

f. 63/81

ANSWER KEY

APPENDICES H, I, AND J

APPENDIX H

Part I

- a.  $\frac{5}{6}$
- b.  $\frac{3}{5}$

- c.  $\frac{7}{12}$
- d.  $\frac{2}{3}$

- e.  $\frac{2}{3}$
- f.  $\frac{5}{7}$

Part II

- a.  $1\frac{6}{7}$
- b.  $2\frac{1}{6}$

- c.  $2\frac{16}{23}$
- d.  $2\frac{5}{8}$

- e.  $3\frac{2}{15}$
- f. 3

Part III

- a.  $\frac{11}{3}$
- b.  $\frac{35}{4}$

- c.  $\frac{41}{6}$
- d.  $\frac{25}{2}$

- e.  $\frac{108}{5}$
- f.  $\frac{119}{8}$

APPENDIX I

- a.  $\frac{1}{24}$
- b.  $1\frac{5}{12}$
- c.  $\frac{3}{4}$
- d.  $4\frac{9}{10}$

- e.  $1\frac{1}{8}$
- f.  $1\frac{8}{21}$
- g.  $\frac{13}{24}$
- h.  $1\frac{7}{20}$

- i.  $\frac{7}{12}$
- j.  $7\frac{19}{35}$
- k.  $1\frac{3}{8}$
- l.  $\frac{8}{15}$

APPENDIX J

Part I

- a. millionths
- b. hundred thousandths
- c. ten thousandths

- d. thousandths
- e. hundredths
- f. tenths

Part II

- a. hundredths
- b. thousandths
- c. ten thousandths

- d. hundred thousandths
- e. millionths

ANSWER KEY  
APPENDICES K AND L

APPENDIX K

Part I

a. 6  
b. 2

c. 44  
d. 3

e. 43  
f. 345

Part II

a. 3.1  
b. 33.3

c. 1.6  
d. 15.2

e. 34.3  
f. 3.7

Part III

a. 1.35  
b. 24.00

c. 9.04  
d. 345.70

e. 55.94  
f. 77.89

Part IV

a. .679  
b. 12.990

c. 332.694  
d. 3.693

e. 678.359  
f. 59.331

APPENDIX L

Part I

a. 7.5  
b. 937.066

c. 519.801  
d. 31.5

e. 50.3401

Part II

a. 374.43  
b. .5477

c. 51.15  
d. 481.9199

e. .445  
f. 22.75

Part III

a. 213.31  
b. .4617

c. 223.7328  
d. 1504.7046

e. 169.5  
f. 293.7

Part IV

a. 26.6505  
b. 1764.062

c. 57.29404  
d. 10.800625

e. 26296.695  
f. 2058.9693

ANSWER KEY  
APPENDICES M AND N

APPENDIX M

Part I

a. 3,540  
b. 3,452.41

c. 3491.3  
d. 519,870

e. 45,923.5  
f. 6.78

Part II

a. 29.8  
b. .04901

c. 4.509  
d. 590,123

e. 6.519  
f. .4508

APPENDIX N

Part I

a. .67  
b. .15

c. .08  
d. 1.25

e. .82  
f. .062

Part II

a. 42%  
b. 2%

c. 89%  
d. 103%

e. .7%  
f. 90%

Part III

a.  $\frac{3}{20}$   
b.  $\frac{13}{20}$

c.  $\frac{6}{5}$   
d.  $\frac{1}{20}$

e.  $\frac{1}{5}$   
f.  $\frac{1}{8}$

Part IV

a. 25%  
b.  $62\frac{1}{2}\%$

c.  $66\frac{2}{3}\%$   
d.  $87\frac{1}{2}\%$

e. 50%  
f.  $83\frac{1}{3}\%$

ANSWER KEY

APPENDICES O AND P

APPENDIX O

Problem 1

Solution:  $I = P \times R \times T$   
 $I = \$1200 \times 6\% \times \frac{8}{12}$   
 $I = \$48$

Problem 2

Solution:  $I = P \times R \times T$   
Length of time = 72 days  
 $I = \$1200 \times 6\% \times \frac{72}{360}$   
 $I = \$14.40$

Problem 3

- |             |             |
|-------------|-------------|
| 1. \$ 96.00 | 4. \$225.00 |
| 2. \$ 30.00 | 5. \$ 35.00 |
| 3. \$135.00 |             |

APPENDIX P

Part I

- |             |             |
|-------------|-------------|
| a. \$360.00 | e. \$120.00 |
| b. \$300.00 | f. \$ 60.00 |
| c. \$180.00 | g. \$ 84.00 |
| d. \$ 96.00 |             |

Part II

- |                       |        |
|-----------------------|--------|
| a. 16%                | d. 20% |
| b. $33 \frac{1}{3}\%$ | e. 14% |
| c. $16 \frac{2}{3}\%$ |        |

SUPPLEMENTARY MATERIALS

Film/Filmstrip

Accounting and Calculating Machines

Teaching Aids Incorporated  
307 South B Street  
San Mateo, CA 94401

Ten-Key Touch Training Course

Educational Developmental Laboratories, Inc.  
284 East Pulaski Road  
Huntington, NY 11743

Simulations

Calculating Machines Simulation

3d edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Clerical Payroll Procedures

8th edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Machine Office Practice

2d edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

RPM Unlimited

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Teaching Aids

Calculator Fun

J. Weston Walch  
Box 658  
Portland, ME 04104-0658

Duplicator Masters for Basic Math

J. Weston Walch  
Box 658  
Portland, ME 04104-0658

357

## Textbooks

Applied Arithmetic for Distribution  
Instructional Materials Center  
The University of Texas at Austin  
200 West 21st Street  
Austin, TX 78712

Calculator Applications for Business Careers  
~~South-Western Publishing Company~~  
11310 Gemini Lane  
Dallas, TX 75229

Consumer Economic Problems  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Electronic Display Calculator Course  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

How to Use Adding and Calculating Machines  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Math in Everyday Life  
J. Weston Welch  
Box 658  
Portland, ME 04104-0658

Mathematics for the Consumer  
3d edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Mathematics Skill Builder  
4th edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Vocational Math for Business  
2d edition  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

## RESOURCES

- Cornelia, Nicholas J., et al. Office Machines Course, 5th edition. Cincinnati: South-Western Publishing Company, 1979.
- Fairbank, Roswell E. and Robert A. Schultheis. Applied Business Mathematics, 11th edition. Cincinnati: South-Western Publishing Company, 1980.
- Huffman, Harry, et al. Math for Business Careers. New York: Gregg McGraw-Hill Book Company, 1975.
- Mason, Louis D. Challenges in Business Math. Portland: J. Weston Walch, 1979.
- Nelson, Frank E. Group Instruction for Cooperative Programs. Stillwater: State Department of Vocational and Technical Education, 1978.
- Pasewark, William R. Electronic Printing Calculator, 2d edition. Cincinnati: South-Western Publishing Company, 1982.
- Pasewark, William R. Ten-Key Listing Machine, 5th edition. Cincinnati: South-Western Publishing Company, 1981.
- Voelker, Pamela. "A Motivational Technique for Business Math." The Balance Sheet, September, 1977.

## UNIT IX

### TYPING REVIEW

#### INTRODUCTION

Typewriting skills are an essential element for successful office employment. Therefore, this unit has been designed to improve the student's typewriting skills and knowledge. The emphasis will be on development of decision-making skills used by all office personnel.

#### COMPETENCIES

1. Increase typewriting proficiency.
2. Produce mailable business documents.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit ability to produce mailable business letters and other office communications.
2. Increase production typewriting proficiency.
3. Improve correction and proofreading skills.
4. Develop ability to properly care for and maintain typewriter.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given business letters in unarranged form on a production test, students will be able to produce three mailable letters in 50 minutes.
2. After a classroom review on tabulation, students will be able to type two tables with correct horizontal and vertical placement in 40 minutes.
3. Given a manuscript in rough-draft form, students will be able to complete in class a multiple-page manuscript with at least 75 percent accuracy.
4. Given a five-minute timed writing test, students will be able to demonstrate a 10 percent increase in speed and accuracy on straight-copy material.

5. Using printed forms, students will be able to type in class the requested information with 100 percent accuracy.
6. In producing mailable copy in class, students will be able to use one correction method effectively.
7. Given business letters in arranged form, the students will be able to produce in class two mailable letters and carbon copies with at least 75 percent accuracy.
8. After a classroom demonstration, students will be able to exhibit ability to change a ribbon on a typewriter in ten minutes.

#### SUGGESTED INTEREST APPROACHES

1. Give sprint drills to increase speed in typewriting.
2. Keep a bar graph of timed writing results. Post gains in speed following each timed writing.
3. Award certificates for timed writing achievement.

#### METHODOLOGY

This unit on typing review is designed to provide students with an opportunity to work individually and in groups. In addition, a minimum amount of lecture for review, discussions, and teacher demonstration will be used.

#### UNIT OUTLINE

##### TYPING REVIEW

#### I. Business Letters

- A. Parts of a business letter
- B. Letter styles and punctuation styles
- C. Placement
- D. Envelopes--typing, folding, and inserting
- E. State abbreviations and ZIP codes

#### II. Tabulation

- A. Horizontal and vertical centering
- B. Unruled, ruled, and boxed tables
- C. Column headings
- D. Tables contained in letters and reports

### III. Manuscripts

- A. Page-line gauge
- B. Single- and multiple-page manuscripts
- C. Manuscript styles
- D. Footnotes
- E. Bibliographies, title pages, and tables of content

### IV. Speed and Accuracy

- A. Paragraphs
- B. Numbers
- C. Production

### V. Special Problems in Office Typing

- A. Printed forms
- B. Carbon copies
- C. Rough draft typing
- D. Correction methods
- E. Machine maintenance

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given business letters in unarranged form on a production test, students will be able to produce three mailable letters in 50 minutes.
- 

### Subject Matter Content

Business Letters

### Learning Activities

1. Complete a worksheet from a workbook on parts of a business letter. Check in class.
2. Prepare a bulletin board on business letter styles, punctuation, and placement.
3. Review handout on official two-letter state abbreviations. (Appendix A)
4. Practice typing, folding, and inserting letters into envelopes.

- 
2. After a classroom review on tabulation, students will be able to type two tables with correct horizontal and vertical placement in 40 minutes.
- 

Subject Matter Content

Tabulation

Learning Activities

1. Complete activity sheet given in workbook on horizontal and vertical centering.
  2. Type tabulation problems with two and three columns.
  3. Type tabulation problems with column headings in different tabulation styles.
  4. Divide into small groups and evaluate the preceding activities.
- 

3. Given a manuscript in rough-draft form, students will be able to complete in class a multiple-page manuscript with at least 75 percent accuracy.
- 

Subject Matter Content

Manuscripts

Learning Activities

1. Review the use of a page-line gauge for use in typing a manuscript. (Appendix B)
2. Type a multiple-page manuscript (with footnotes) given in unarranged form. Use Appendix B.
3. Compose and type a report using manuscript rules.
4. Correct copy from Activity 3 using proofreader's marks.
5. Exchange papers (from Activity 4) with peer and retype from corrected rough draft.

- 
4. Given a five-minute timed writing test, students will be able to demonstrate a 10 percent increase in speed and accuracy on straight-copy material.
- 

Subject Matter Content

Speed and accuracy

Learning Activities

1. Practice for speed by taking ten sprint speed drills on sentences.
  2. Type five paragraphs in a foreign language from drill book to increase accuracy.
  3. Divide into pairs and proofread paragraphs from Activity 2.
  4. Record speed and accuracy levels in notebook to show increases and decreases in speed.
- 

5. Using printed forms, students will be able to type in class the requested information with 100 percent accuracy. ✓
- 

Subject Matter Content

Printed forms

Learning Activities

1. Discuss in small groups what information might be requested on printed forms.
  2. Type the requested information on the following forms: W-4, application for a social security number, invoice, purchase order, and memo.
  3. Survey local businesses to determine types of forms used and report to the class.
- 

6. In producing mailable copy in class, students will be able to use one correction method effectively.
-

### Subject Matter Content

Correction methods

### Learning Activities

1. Survey the market of available correction methods. Have a "Show and Tell Day."
2. Interview secretaries to find out their preferred correction method. Discuss findings in class.
3. In a group discussion, list the advantages and disadvantages of available correction methods.

- 
7. Given business letters in arranged form, the students will be able to produce in class two mailable letters and carbon copies with at least 75 percent accuracy.
- 

### Subject Matter Content

Carbon copies

### Learning Activities

1. Divide into groups and choose one of the following activities to demonstrate to the class:
  - a. Steps in assembling a carbon pack using the "Show and Tell" approach.
  - b. Procedure for erasing errors on a carbon copy.
  - c. Corrections using correction fluid, correction tape, and eraser.
  - d. Results of reversing carbon paper.
  - e. Corrections after removing paper from machine.
2. Type two business letters in the following styles with one carbon copy in mailable form:
  - a. Block with open punctuation.
  - b. Modified block with paragraph indentation and mixed punctuation.

- 
8. After a classroom demonstration, students will be able to exhibit ability to change a ribbon on a typewriter in three minutes.
- 

Subject Matter Content

Typewriter maintenance

Learning Activities

1. Demonstrate the steps used in changing the ribbon on a typewriter.
2. Practice changing the ribbon.
3. Listen to a repair person discuss preventive typewriter maintenance.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Timed writings on paragraphs
- \* Timed writings on numbers
- \* Production test
- \* Unit test

## EQUIPMENT AND SUPPLIES

### Student

Typewriter  
Textbook  
Typing Paper  
Carbon Paper  
Envelopes  
Correction Materials  
Reference Materials  
Printed Forms  
Page-line Gauge  
Worksheet of Letter Parts  
Notebook

### Teacher

Typewriter  
Textbooks and Manuals  
Bulletin Board Materials  
Construction Paper  
Wall Charts  
Office Manuals  
Reference Manuals  
Printed Forms  
Typing Rulers  
Typing Paper  
Carbon Paper  
Envelopes  
Correction Materials  
Paper Cutter  
Typewriter Ribbons

APPENDIX A

TWO-LETTER STATE ABBREVIATIONS

FOR USE WITH ZIP CODES

<u>Old</u>	<u>New</u>	<u>Old</u>	<u>New</u>
Ala.	AL	Mont.	MT
Alaska	AK	Nebr.	NB
Ariz.	AZ	Nev.	NV
Ark.	AR	N.H.	NH
Calif.	CA	N.J.	NJ
Colo.	CO	N. Mex.	NM
Conn.	CT	N.Y.	NY
Del.	DE	N.C.	NC
D.C.	DC	N. Dak.	ND
Fla.	FL	Ohio	OH
Ga.	GA	Okla.	OK
Hawaii	HI	Oreg.	OR
Idaho	ID	Pa.	PA
Ill.	IL	P.R.	PR
Ind.	IN	R.I.	RI
Iowa	IA	S.C.	SC
Kans.	KS	S. Dak.	SD
Ky.	KY	Tenn.	TN
La.	LA	Tex.	TX
Maine	ME	Utah	UT
Md.	MD	Vt.	VT
Mass.	MA	VA.	VA
Mich.	MI	Wash.	WA
Minn.	MN	W. Va.	WV
Miss.	MS	Wis.	WI
Mo.	MO	Wyo.	WY

APPENDIX B  
PAGE-LINE GAUGE



7

10

13

18  
17  
16  
15  
14  
13  
12  
11  
10  
9  
8  
7  
6  
5  
4  
3  
2  
1

2 inch

1 inch

IX-10  
369

SUPPLEMENTARY MATERIALS

Cassettes

Typewriting Drills for Speed and Accuracy

87527-8 (10 cassettes)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Typewriting Speed/Control Building

T076 (4 cassettes)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Filmstrips with Cassettes

Skill Development--Electric Typewriter

88770-5 (6 filmstrips)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Textbooks

Century 21 Typewriting

T70 (Complete Course)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Gregg Typing, Series Six

38241-7 (General Course)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Secretarial Office Procedures

Oliverio and Pasewark, Ninth Edition  
K33. (Textbook)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Typing Power Drills

Lloyd, Rowe, and Winger; Second Edition  
38171  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Transparencies

Production Transparencies

86313-X (60 transparencies)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Volume IV--Typewriting Special Applications

T802-4  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Volume III--Typewriting Production

T802-3  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Miscellaneous

Fundamentals of the Research Paper

K105  
Kenneth Publishing Company  
Box 09074  
Chicago, IL 60609

Slow Country Typewriting Practice Set

K01 (Student instruction manual, business forms, and  
4 folders for 20 jobs)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Typewriting Speed Chart

X2185  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Typewriting Style Manual

T809  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

## RESOURCES

- "A Catalog of Performance Objectives, Criterion--Referenced Measures, and Performance Guides for Secretarial, Stenographic, Typing, and Related Occupations." Virginia: Vocational-Technical Education Consortium of States.
- Lloyd, Alan C., et al. Gregg Typing, Series Six, Typing 1, General Course. New York: McGraw-Hill Book Company, 1977.
- Lloyd, Alan C., et al. Gregg Typing, Series Six, Typing 2, Advanced Course. New York: McGraw-Hill Book Company, 1977.
- Lloyd, Alan C., et al. Gregg Typing for Colleges, Complete Course. New York: McGraw-Hill Book Company, 1979.
- Mach, K. A., et al. Typewriting; A Mastery Approach. Chicago: Science Research Associates, Inc., 1978.
- Moon, Harry C. Typing From Rough Drafts,--Student Projects Book (For Advanced Typewriting). New York: Milady Publishing Corp., 1977.
- Wanous, S. J., et al. College Typewriting. Tenth Edition. Cincinnati, Ohio: South-Western Publishing Company, 1980.

UNIT X  
SHORTHAND REVIEW

INTRODUCTION

The Department of Labor's Occupational Outlook Handbook for 1978-79 indicates that there are 295,000 projected annual openings from 1976-1985 for secretaries and stenographers. These secretaries and stenographers must be able to produce mailable copy for continued employability and promotability.

This unit offers suggestions to aid students in attaining entry-level skills by reinforcing shorthand theory and building transcription competence with emphasis on proofreading and mailability.

COMPETENCIES

1. Build dictation speed including specialized vocabulary.
2. Develop skills necessary for the production of mailable copy.

GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Build dictation skills for entry-level positions.
2. Develop ability to produce mailable correspondence from dictation.
3. Demonstrate proofreading ability.

SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. From a dictated list of words containing all shorthand principles, students will be able to write the shorthand characters and transcribe them with at least 75 percent accuracy.
2. On a dictation test, students will be able to increase their speed by at least ten words a minute.
3. Given dictation at 60-70-80 words per minute, students will be able to transcribe in class two average-length letters in mailable copy form.

4. In a classroom situation, students will be able to contribute at least one example of proper punctuation and capitalization usage for each rule.
5. On a written test, students will be able to identify a list of proofreader's marks with 100 percent accuracy.
6. On a written test, students will be able to locate typographical and subject-matter errors in sentences with 100 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Have students tape office-style dictation for individual practice.
2. Invite a practicing secretary to talk to the COE class stressing the importance of having a knowledge of shorthand in the world of business.
3. Have the students secure advertisements which indicate the need for shorthand in business.
4. Pretest to determine students' present speed levels.

#### METHODOLOGY

Because many of the students in a COE class will not have had shorthand, very little can be done as a class towards building shorthand skills. Students can be given pretests to determine the speed at which they are capable of performing. After determining the goal speed for each student, commercially prepared or teacher-made tapes can be used to develop individual speed progress.

For additional practice in proofreading, students could transcribe tapes and complete proofreading drills.

#### UNIT OUTLINE

#### SHORTHAND REVIEW

##### I. Taking Dictation

- A. Reinforcing theory
- B. Building speed
- C. Using specialized vocabulary

## II. Transcribing

- A. Building transcription skills
- B. Producing mailable copy
  - 1. punctuation
  - 2. capitalization

## III. Proofreading

- A. Reviewing proofreaders' marks
- B. Finding typing errors
- C. Locating subject-matter errors

### SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. From a dictated list of words containing all shorthand principles, students will be able to write the shorthand characters and transcribe them with at least 75 percent accuracy.
- 

#### Subject Matter Content

Reinforcing theory

#### Learning Activities

1. Write in shorthand, words and phrases dictated on recorded media. Check outlines with master copy and make corrections.
2. Prepare a bulletin board illustrating brief forms.
3. Write shorthand brief forms from recorded media. Check outlines with master copy and make corrections.
4. Compose letters in shorthand and exchange with peers for reading and writing practice.
5. Write in shorthand from recorded media letters containing medical terminology. Check outlines on master sheet and correct.

- 
2. On a dictation test, students will be able to increase their speed by at least ten words a minute.
-

Subject Matter Content

Building speed

Learning Activities

1. Practice taking shorthand from speed-building exercises (recorded media) which are ten words per minute above present level. Check shorthand dictionary for questionable outlines.
2. In a small group, practice difficult outlines from chalkboard or overhead transparencies, giving attention to the correct formation of outlines.
3. Read shorthand material from related periodicals for reading practice.
4. Take dictation in shorthand from speeches, news, and songs from radio or television to build speed. Transcribe in class.

- 
3. Given dictation at 60-70-80 words per minute, students will be able to transcribe in class two average-length letters in mailable copy form.
- 

Subject Matter Content

Transcription skills

Learning Activities

1. Transcribe articles from business related periodicals and check transcript with key.
2. Transcribe a letter from a peer's notes and have peer check for accuracy.
3. Take dictation in shorthand from speeches, news, and songs from radio or television. Transcribe in class the next day.

Transcription skills

4. Divide into groups and compose two average-length letters. Have teacher dictate letters composed. Transcribe and have each group check letter composed.

- 
4. In a classroom situation, students will be able to contribute at least one example of proper punctuation and capitalization usage for each rule.
- 

Subject Matter Content

Punctuation and capitalization

Learning Activities

1. Place correct punctuation in sentences and write reasons on a practice review sheet. Check with master and make corrections.
2. Write comma rules from memory. Check master list and correct.
3. Write sentences illustrating capitalization rules, omitting capitals. Exchange papers with peers and capitalize sentences, giving reasons.
4. Prepare a bulletin board illustrating rules for and examples of correct usage of commas.

- 
5. On a written test, students will be able to identify a list of proofreader's marks with 100 percent accuracy.
- 

Subject Matter Content

Proofreader's marks

Learning Activities

1. Match proofreader's marks with definitions and make corrections if necessary. (Appendix A)
2. Type from a rough draft drill. Check master sheet for correctness.

Proofreader's marks

3. Use proofreader's marks to correct a business document. Consult answer key.
4. Prepare a bulletin board illustrating proper uses of proofreader's marks.

- 
6. On a written test, students will be able to locate typographical and subject-matter errors in sentences with 100 percent accuracy.
- 

Subject Matter Content

Subject matter and typographical errors

Learning Activities

1. Compare pairs of numbers and names, indicating those which are the same. Check answers with master. (Appendix B)
2. Prepare a list of the two-letter state abbreviations. Check with master and correct.
3. Underline the correctly spelled words in list. Check with master. (Appendix C)
4. Correct errors in the expression of numbers as words or figures. Check answers and correct. (Appendix D)

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth.

- \* Dictation tests
- \* Test on proofreader's marks
- \* Test on correction of rough draft
- \* Test on punctuation and capitalization

## EQUIPMENT AND SUPPLIES

### Student

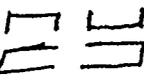
Textbook  
Shorthand Pad  
Shorthand Dictionary  
Dictionary  
Pens (red, black/blue)  
Typing Paper  
Correction Materials  
Carbon Paper  
Notebook Paper  
Instruction Sheets  
Typewriters

### Teacher

Textbook and Manual  
Recorded Media  
Recorder  
Overhead Projector  
Transparencies  
Transparency Pens  
Bulletin Board Supplies  
Specialized Dictionaries  
Instruction Sheets

APPENDIX A  
 PROOFREADER'S MARKS

Using the blank provided, match the proofreader's marks with the correct definition. Check answers from master copy.

- |   |   |
|---|---|
| _____ 1. SS   | a. Transpose letters or words                                     |
| _____ 2. A  | b. Delete copy  |
| _____ 3. //   | c. Cross out the misstroke and write the correct letter above it. |
| _____ 4.   | d. Change copy as indicated                                       |
| _____ 5.   | e. Close up horizontal space                                      |
| _____ 6. #  | f. Insert copy (caret)  |
| _____ 7. DS   | g. Insert period  |
| _____ 8. Stet or ...  | h. Insert question mark   |
| _____ 9.   | i. Insert exclamation point                                       |
| _____ 10. Cap. or =   | j. Insert punctuation mark  |
| _____ 11.  or /  | k. Insert space   |
| _____ 12. -?  | l. Question the writer  |
| _____ 13.     | m. Use lowercase letters  |
| _____ 14.    | n. Capitalize single letter or words                              |
| _____ 15.    | o. Add triple space   |
| _____ 16. TS  | p. Add double space   |
| _____ 17.    | q. Close up to single space                                       |
| _____ 18.  /    | r. Let it stand; ignore correction                                |
| _____ 19. ? /   | s. Move copy in the direction of the bracket.                     |
| _____ 20.    |   |

APPENDIX A CONTINUED

- |   |   |
|---|---|
| _____ 21. /                             | t. Begin new paragraph; run paragraphs together |
| _____ 22. <u>      </u> or <i>ital.</i> | u. Underline or italicize                       |
| _____ 23. _____                         | v. Align copy                                   |
| _____ 24. _____                         | w. Spell out word or number                     |
| _____ 25. = / or $\bar{\quad}$          | x. Cross out word; write as figure              |
|   | y. Insert hyphen                                |

APPENDIX B

PROOFREADING NAMES AND NUMBERS

Proofread the following parts of names and numbers to train yourself to recognize differences in these. If the names and numbers in both columns are exactly the same, place a check in the blank.

1. James A. O'Donnell	James A. Odonnell	1. <input type="checkbox"/>
2. Miss Donna Iver	Miss Donna Ivers	2. <input type="checkbox"/>
3. Alice C. Freidman	Alice G. Greidman	3. <input type="checkbox"/>
4. Ms. Alice W. Hunter	Ms. Alice W. Hunter	4. <input type="checkbox"/>
5. Dr. Paul M. Hebert	Dr. Paul M. Herbert	5. <input type="checkbox"/>
6. Issac C. Doms	Isac C. Doms	6. <input type="checkbox"/>
7. John A. Robichaux	John R. Robichaux	7. <input type="checkbox"/>
8. Mrs. Amy Jane Smythe	Mrs. Amy June Smythe	8. <input type="checkbox"/>
9. Harry Paul Witherspoon	Harry Paul Witherspoon	9. <input type="checkbox"/>
10. Johnny Appel Jones	Johnny Appell Jones	10. <input type="checkbox"/>
11. (504) 616-5617	(504) 616-5617	11. <input type="checkbox"/>
12. (704) 318-3189	(704) 318-3188	12. <input type="checkbox"/>
13. \$560,000.90	\$560,000.90	13. <input type="checkbox"/>
14. 0.09 gram	0.09 gram	14. <input type="checkbox"/>
15. 1981-1982	1981-1982	15. <input type="checkbox"/>
16. 2-28-82	2-26-82	16. <input type="checkbox"/>
17. 1,345,989,090	1,345,988,090	17. <input type="checkbox"/>
18. 9:08 a.m.	9:08 a.m.	18. <input type="checkbox"/>
19. Hotel Room 1927	Hotel Room 1297	19. <input type="checkbox"/>
20. 12.98756	1.298756	20. <input type="checkbox"/>
21. 1923 Byron Street	1933 Byron Street	21. <input type="checkbox"/>
22. 2/10, n/30	2/10, n/30	22. <input type="checkbox"/>

APPENDIX C  
SPELLING CHECKLIST

Underline the correctly spelled word in the lists.

- |                 |              |
|-----------------|--------------|
| 1. acurate      | accurate     |
| 2. circulars    | circulers    |
| 3. underlinning | underlining  |
| 4. transmitted  | transmited   |
| 5. seperate     | separate     |
| 6. transfereing | transferring |
| 7. vocabulery   | vocabulary   |
| 8. unnecessary  | unecessary   |
| 9. garantee     | guarantee    |
| 10. goverment   | government   |
| 11. hiting      | hitting      |
| 12. merryly     | merrily      |
| 13. heartly     | heartily     |
| 14. fiting      | fitting      |
| 15. manageable  | managable    |
| 16. happyness   | happiness    |
| 17. preventible | preventable  |
| 18. planing     | planning     |
| 19. chargeing   | charging     |
| 20. flying.     | fling        |
| 21. useable     | usable       |
| 22. lovable     | loveable     |
| 23. procedeure  | procedure    |
| 24. clerecal    | clerical     |
| 25. effectivly  | effectively  |

APPENDIX D

EXPRESSION OF NUMBERS

Directions: If the sentence is correct, mark "C" before it; if it is incorrect, mark "X" and underline the error.

1. The memorandum is dated May 5th, not May 6th.
2. There are 500 pens in the box.
3. Is the price on the pen 75¢?
4. Forty pencils were taken from the stockroom.
5. Do you always begin school at eight o'clock?
6. At the age of 25, John completed his schooling.
7. He lives at 1 Park Place.
8. The celebration will take place on the 11th of June.
9. The correct price for the fan is \$198.00
10. The item now costs 5 cents rather than 3 cents.
11. The man ordered ten 3-pound bags of cement.
12. Please write gift certificates in the amounts of \$5, 10 and 15.
13. In 1982 the company added 22,000 subscribers to their list.
14. Living costs increased 20 to 30 percent.
15. Nicole is four pounds heavier than Lauri.
16. The can weighs 5 pounds 3 ounces.
17. We found 2 of the four children hiding.
18. 15 pairs of skates were on the shelf.
19. We appreciate your order of July 10.
20. Her order was for 220 five-foot boards.

ANSWER KEY  
APPENDICES A, B, C, AND D

APPENDIX A

1. Q.	6. K	11. M	16. O	21. C
2. T	7. P	12. L	17. W	22. U
3. V	8. R	13. J	18. I	23. X
4. A	9. S	14. E	19. H	24. D
5. B	10. N	15. G	20. F	25. Y

APPENDIX B  
(Numbers that are the same.)

4	11.	14	18.
9	13	15	22

APPENDIX C

1. accurate	8. unnecessary	14. fitting	20. flying
2. circulars	9. guarantee	15. manageable	21. usable
3. underlining	10. government	16. happiness	22. lovable
4. transmitted	11. hitting	17. preventable	23. procedure
5. separate	12. merrily	18. planning	24. clerical
6. transferring	13. heartily	19. charging	25. effectively
7. vocabulary			

APPENDIX D

1. X, th, th	6. X, 25	11. C	16. C
2. C	7. X, 1	12. X, 10, 15	17. X, 2
3. X, ¢	8. C	13. C	18. X, 15
4. C	9. X, 00	14. C	19. C
5. C	10. C	15. X, four	20. C

SUPPLEMENTARY MATERIALS.

Cassettes

Business Letter Tapes for Dictation and Transcription

87320.8 (10 cassettes)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Century 21 Shorthand: Advanced Dictation/Transcription

R124 (36 cassettes)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Century 21 Shorthand: Intensive Dictation/Transcription

R114 (26 cassettes)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Century 21 Shorthand: Theory and Practice

R104 (20 cassettes)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Corporate Giants Dictate

MCP-9 (10 one-hour cassettes, case)  
Dictation Disc Company  
240 Madison Avenue,  
New York, NY 10016

DDC Student Homework Cassettes

S-8, Set 480 (brief forms, 40-80 wpm).  
S-9, Set 482 (theory review, 60-90 wpm)  
Dictation Disc Company  
240 Madison Avenue  
New York, NY 10016

Gregg Shorthand Speed Development Tape Library

87100.0 (Cassette)  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

386

Cassettes continued

Individual Progress Method, Series 90 (1PM/2)

87952.4 Channel B  
87953.2 Channel C  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Legal Dictation

MTL-10 (10 cassettes, book, case)  
Dictation Disc Company  
240 Madison Avenue  
New York, NY 10016

The Legal Secretary

Y66Y666 (Office Job Simulation, Dictation/Transcription  
Cassette)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

The Medical Secretary--Northside Medical

Y67Y676 (Office Job Simulation, Dictation/Transcription  
Cassette)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Pyramided Business Letter Dictation

BLD-I (9 cassette set, 50-80 wpm)  
BLD-II (9 cassette set, 80-110 wpm)  
Dictation Disc Company  
240 Madison Avenue  
New York, NY 10016

The Secretary, Executive Offices of America

Y65-Y656 (Office Job Simulation, Dictation/Transcription  
Cassette)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Shorthand Speed Sprint Drills

SSSD-CB (8 cassette set)  
Dictation Disc Company  
240 Madison Avenue  
New York, NY 10016

Cassettes continued

32 Speed-Building Cassettes

C200 (32 one-hour cassettes, case, key)  
Dictation Disc Company  
240 Madison Avenue  
New York, NY 10016

Textbooks

Century 21 Shorthand: Advanced Dictation/Transcription

R12  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Century 21 Shorthand Dictionary

R14  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Century 21 Shorthand Legal Dictionary

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Gregg Shorthand Dictionary, Series 90

24481-2  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Speed Dictation with Previews in Gregg Shorthand, Series 90

73045-8  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Transparencies

Gregg Shorthand Transparencies, Series 90

86642.2 Transcription/Punctuation (48 transparencies)  
86643.0 Transcription/Typing Style (48 transparencies)  
86644.9 Transcription/Spelling (48 transparencies)  
Gregg McGraw Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Techniques of Machine Transcription

GV116T (10 transparencies)  
Career Aids, Inc.  
8950 Lurline Avenue, Dept. T7 388  
Chatsworth, CA 91311

## RESOURCES

- Camp, Sue C. Developing Proofreading Skill. Gregg McGraw-Hill Book Company, 1980.
- Crank, Doris H. and Willie Oranda Pyke. "Suggested Strategies for Teaching Shorthand, Developing Shorthand Theory and Reading Skills (Part 1)." Business Education World, Vol. 60/No. 1, September-October, 1979, pp. 3-4.
- Crank, Doris H. and Willie Oranda Pyke. "Suggested Strategies for Teaching Shorthand, Transcription Skills (Part 3)." Business Education World, Vol. 60/No. 3, January-February, 1980, pp. 18-19.
- Dry, Samuel W. and Nellie E. Dry. Teaching Gregg Shorthand and Transcription. Portland: J. Weston Walch, Publisher, 1969.
- Jones, Ellis J. and David H. Kane. Proofreading Precision. South-Western Publishing Company, 1982.
- Leslie, Zoubek, Lemaster, Strony. Instructor's Handbook for Gregg Dictation and Introductory Transcription. Gregg McGraw-Hill Book Company, 1978.
- Motivation Manual, a How-to Approach. Gregg McGraw-Hill Book Company, 1979, p. 4.
- Stewart, Lanham, and Zimmer. Business English and Communication. Gregg McGraw-Hill Book Company, 1978. Fifth Edition.

## UNIT XI

### OFFICE PROCEDURES REVIEW

#### INTRODUCTION

A unit in general office procedures can cover many topics. Because a secretary has so many varied activities, this unit has been designed to review some of those not covered in other units in this curriculum guide. Some of the subject matter to be covered include office manners, the work station, mail processing, travel plans, and meeting procedures.

Students will have opportunities to contact local businesses for assistance in completing some of the activities.

#### COMPETENCIES

1. Examine the knowledge and skills necessary for successful performance in the office.
2. Develop proficiency in handling procedures for mail, shipping, travel, meetings, and conferences.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Recognize the importance of the duties of a secretary.
2. Demonstrate efficient handling of mail and shipping services.
3. Apply correct procedures in handling travel.
4. Exhibit the ability to help in planning and conducting meetings and conferences.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. On a written test, students will be able to identify and describe at least five duties of a secretary.
2. Given a list of five situations involving office visitors and telephone calls, students will be able to write (on a test) acceptable ways of handling these persons with at least 75 percent accuracy.

3. Given five pieces of incoming and outgoing mail on a test, students will be able to employ proper procedures for handling mail with at least 75 percent accuracy.
4. On a written test, students will be able to list and describe the function of at least three pieces of equipment used in processing mail.
5. Given shipping and mailing instructions, students will be able to select the appropriate method for sending various materials with at least 75 percent accuracy.
6. As an individual project, students will be able to make all arrangements for a business trip, including travel to and from a given destination, accommodations, appointments, itinerary, expense report, and follow-up tasks. A checklist will be used to evaluate student performance.
7. Given a list of duties to be performed in successfully conducting a meeting, students will be able to rank the duties in the order to be completed and describe on a written test the work associated with each duty with at least 75 percent accuracy.
8. In a written report, students will be able to explain the steps involved in holding a successful conference. A checklist will be used to evaluate the report.

#### SUGGESTED INTEREST APPROACHES

1. Invite postal employees, secretaries, and travel agents to speak on mail regulations, public relations, and travel.
2. Visit the mail room of a large company.
3. Interview a secretary or other office employee on office manners.
4. Contact office supply stores for brochures and information on mailing equipment.
5. Attend meetings of civic or public organizations to observe parliamentary procedure and the duties of the secretary.

#### METHODOLOGY

This unit contains various simulation activities relating to the business community. Class discussion and teacher lecture will be used to present content material from the textbook or other resources available to the instructor.

## UNIT OUTLINE

### OFFICE PROCEDURES REVIEW

#### I. Managing the Office

- A. Responsibilities
  - 1. Routine duties
  - 2. Assigned tasks
  - 3. Supervision
  - 4. Public relations
- B. Work station
  - 1. Equipment
  - 2. Supplies
  - 3. Decorations
  - 4. Maintenance

#### II. Mail and Shipping Services

- A. Mail
  - 1. Incoming mail
  - 2. Outgoing mail
  - 3. Volume mail
  - 4. Equipment
  - 5. Special services
- B. Shipping
  - 1. United Parcel Service
  - 2. Express service
  - 3. Freight

#### III. Travel

- A. Arrangements
  - 1. Domestic
    - a. Air
    - b. Bus
    - c. Car
    - d. Rail
    - e. Ship
  - 2. International
    - a. Passport
    - b. Visa
    - c. Immunization
- B. Itinerary
- C. Expense report
- D. Follow-up

#### IV. Meetings and Conferences

##### A. Meetings

1. Pre-arrangements
  - a. Reservations
  - b. Notices
  - c. Agenda
2. Meeting procedures
  - a. Parliamentary procedure
  - b. Notes
3. Post-meeting duties
  - a. Minutes
  - b. Other

##### B. Conferences

1. Registration
2. Speakers
3. Publicity
4. Social

#### SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. On a written test, students will be able to identify and describe at least five duties of a secretary.
- 

##### Subject Matter Content

Managing the office

##### Learning Activities

1. Divide into groups and list duties of a secretary. Consolidate the group lists into one class list and discuss.
2. Categorize the duties from Activity 1 as "routine," "assigned," "supervisory," or "public relations."
3. Visit a business office and interview the secretary to determine how an attractive work station is maintained and what equipment and supplies are most commonly used. Prepare a class list of the findings.

- 
2. Given a list of five situations involving office visitors and telephone calls, students will be able to write (on a test) acceptable ways of handling these persons with at least 75 percent accuracy.
- 

Subject Matter Content

Public relations-

Learning Activities

1. Listen to a guest speaker (secretary, office manager, or executive) explain guidelines for handling office visitors. Type a list of the guidelines presented.
2. Write a situation that might occur in an office involving a difficult visitor.
3. Select a partner and choose one event from Activity 2 to role play.
4. Choose another event and partners will switch roles.
5. Evaluate the secretary's handling of the situation. (Appendix A)
6. View a film or filmstrip on office manners. (See Supplementary Materials for suggestions.) Discuss film in class.

- 
3. Given five pieces of incoming and outgoing mail on a test, students will be able to employ proper procedures for handling mail with at least 75 percent accuracy.
- 

Subject Matter Content

Mail--incoming, outgoing, volume

Learning Activities

1. Process incoming mail by opening, dating, sorting, and distributing. Check for accuracy.
2. Process outgoing mail by inserting into envelopes, weighing, affixing postage, and sorting. Check for accuracy.

XI-5

3. Use a Zip Code Directory to find the correct ZIP code for various addresses. Check for accuracy.
4. Visit the mail room of a large company to observe steps in handling the mail.
5. In groups, compose a short report; summarizing the steps you observed in Activity 5. Have a member of the group type the report and post it in the classroom.

- 
4. On a written test, students will be able to list and describe the function of at least three pieces of equipment used in processing mail.
- 

Subject Matter Content

Mail--equipment

Learning Activities

1. Set up a model desk to be used in processing mail. Make a list of supplies and equipment needed.
2. Choose one of the following pieces of mail equipment:
  - a. postage meter
  - b. scale
  - c. mail opener
  - d. time and date recorder
  - e. folding and inserting equipment
  - f. electronic ZIP code sorter
  - g. sorting racksContact office supply stores to obtain information on functions, cost, maintenance, and other information available.
3. Use information from Activity 2. Compare brands and recommend one to purchase. Defend your choice in class.

Mail--equipment

4. Contact the postal service or have a post office employee speak to the class on current postage rates for different classes of mail. Make a chart (poster) to display in the classroom.
5. Prepare a bulletin board with brochures on mail equipment.

- 
5. Given shipping and mailing instructions, students will be able to select the appropriate method for sending various materials with at least 75 percent accuracy.

---

Subject Matter Content

Mail--special services and shipping

Learning Activities

1. Prepare in groups a crossword puzzle using terminology related to special mailing services and shipping methods.
2. Call or visit a representative of an express service or freight company to obtain information concerning rates and services available. Present your findings to the class.
3. Prepare special mail or other packages for mailing or shipping. Share with class.
4. Type an outgoing mail schedule from your city and post on the bulletin board.

- 
6. As an individual project, students will be able to make all arrangements for a business trip, including travel to and from a given destination, accommodations, appointments, itinerary, expense report, and follow-up tasks. A checklist will be used to evaluate student performance.

---

Subject Matter Content

Travel

Learning Activities

1. Visit a travel agency to learn what services can be provided. Prepare a bulletin board showing these services.

## Travel

2. Find a sample itinerary in a typing book or other textbook and type a copy of it, paying close attention to proper form.
3. Choose a city at least 200 miles from your own and compare the cost and convenience of travel by air, bus, car, rail, and ship (if applicable). Then choose a city less than 200 miles from your own. Make a table showing the comparative cost of each mode of transportation. Choose the mode you feel is most economical and support your choice in class.
4. Write to the proper government agencies for information on passports, visas, and inoculations needed for international travel. Present your findings to the class.

---

Given a list of duties to be performed in successfully conducting a meeting, students will be able to rank the duties in the order to be completed and describe on a written test the work associated with each duty with at least 75 percent accuracy.

---

### Subject Matter Content

#### Meetings

### Learning Activities

1. Follow parliamentary procedure in conducting a mock meeting involving all class members.
2. Volunteer to act as secretary for a meeting of a school organization. Be sure to perform all pre- and post-meeting duties as well as meeting procedures. Report your experiences to the class.
3. Type the minutes from Activity 2 and submit to your teacher.
4. Observe the secretary at the next meeting you attend. Note his/her actions during the course of the meeting. Report observations to class.

- 
8. In a written report, students will be able to explain the steps involved in holding a successful conference. A checklist will be used to evaluate the report.
- 

Subject Matter Content

Conferences

Learning Activities

1. Compose and type a letter inviting a prospective guest speaker to a conference. Check for correctness.
2. Prepare a registration form to be sent to persons to attend your conference. Be sure to include space for all necessary information such as room reservation, meals (banquets), arrival and departure dates, etc. Discuss with class.
3. Write a short paragraph to make the conference sound as appealing as possible. Present to class.
4. Investigate places of interest in your town or area which you may recommend to visitors attending the conference. Type your recommendations in attractive form and place on bulletin board.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Individual projects
- \* Written reports

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Rating Sheets  
Typing Supplies  
Poster Paper  
Typewriter  
Pens  
Pencils

### Teacher

Textbook and Manual  
Rating Sheets  
Bulletin Board Materials  
Mail Processing Supplies  
Robert's Rules of Order  
Filmstrip Projector  
Film Projector  
Film/Filmstrips

APPENDIX A  
HANDLING VISITORS

Use this form to rate the secretary's performance. Place a check mark in the appropriate column.

	Acceptable	Unacceptable
Greeting		
Courtesy/Tact		
Helpfulness		
Vocabulary		
Tone of Voice		
Decision Making		

APPENDIX B

CHECKLIST FOR TRAVEL ARRANGEMENTS :

\_\_\_\_\_ Convenient mode of transportation

\_\_\_\_\_ Suitable accommodations

\_\_\_\_\_ Appointments timely scheduled

Reports typed:

\_\_\_\_\_ in acceptable format

\_\_\_\_\_ with no uncorrected typographical errors

Project contains:

\_\_\_\_\_ complete information

\_\_\_\_\_ logical arrangement of material

\_\_\_\_\_ correct grammar

\_\_\_\_\_ correct punctuation

Overall project is \_\_\_\_\_ acceptable \_\_\_\_\_ unacceptable.

401

APPENDIX C

CHECKLIST FOR HOLDING A CONFERENCE

Steps include:

- securing speakers
- mailing publicity to prospective participants
- preparing menus
- planning social activities
- reserving the meeting rooms
- receiving registrations by mail
- publicizing the conference
- obtaining biographical material from speakers
- securing necessary equipment
- setting up registration
- preparing notices to direct participants to meeting rooms
- typing the program
- sending thank-you notes
- sending follow-up reports, letters
- making an evaluation of the conference

Overall report is  acceptable  unacceptable.

## SUPPLEMENTARY MATERIALS

### Activity Packs

#### Office Practice Activities

03-2418-B5 (50 spirit masters)  
J. Weston Walch, Publisher  
Box 658  
Portland, ME 04104-0658

#### Recording Secretary Activity Pack

09-2424-B5 (1 cassette, 14 visual masters, 16 spirit masters,  
1 teacher guide)  
J. Weston Walch, Publisher  
Box 658  
Portland, ME 04104-0658

### Books

#### Reference Manual for Office Personnel

Sixth Edition  
K45 (Reference Manual)  
K451 (Study Guides)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

### Cassettes

#### Office Simulation--Dictation/Transcription Cassette

Y656 (1 cassette)  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

### Films

#### Basic Job Skills: Dealing with Customers

Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

#### Ben Franklin, Here!

Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Help Wanted: Secretary  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

How to Conduct a Meeting  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

How to Run a "Better" Mail Room  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Mail it Right!  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

More and Louder  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Office Practice: Manners and Customs  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Parliamentary Procedure in Action  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Secretary: A Normal Day  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Story of the U.S. Mail  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Filmstrips

Dealing with People  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

The Executive Secretary  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Helping Your Boss Get More Done  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Just a Secretary  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Mail Processing: The Ins and Outs  
RM6005 (1 filmstrip, 1 cassette, and teacher guide)  
Career Aids, Inc.  
8950 Lurline Avenue  
Dept. K45  
Chatsworth, CA 91311

Working World of the Secretary  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

Your Parliamentary Partner: Mr. Main Motion  
Business Education Films  
7820 20th Avenue  
Brooklyn, NY 11214

### Simulations

Pinetree Fashions  
Y52  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

The Secretary, Executive Offices of America  
Y65  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

405

Slides

Daily Office Procedures

04-2305-B5 (22 35mm slides)

05-2306-B5 (1 cassette)

J. Weston Walch, Publisher

Box 658

Portland, ME 04104-0658

Processing Incoming and Outgoing Mail

MI1355 (35 slides, 1 cassette, teacher guide)

Career Aids, Inc.

8950 Lurline Avenue

Dept. K45

Chatsworth, CA 91311

XI-17

406

## RESOURCES.

Church, Olive D. and Anne E. Schatz. Office Systems and Careers.  
Boston: Allyn and Bacon, Inc., 1981.

Hanna, J. Marshall, et al. Secretarial Procedures and Administration,  
7th edition. Cincinnati: South-Western Publishing Company, 1978.

Jennings, Lucy Mae. Secretarial and Administrative Procedures. Englewood  
Cliffs, NJ: Prentice-Hall, Inc., 1978.

Leaming, Marj P. and Robert J. Motley. Administrative Office Management--  
A Practical Approach. Dubuque, Iowa: Wm. C. Brown Company  
Publishers, 1979.

Moon, Harry R. Office Procedures Teachers' Manual. Bronx, NY: Milady  
Publishing Company, 1981.

Oliverio, Mary Ellen and William R. Pasework. Secretarial Office  
Procedures, 9th edition. Cincinnati: South-Western Publishing  
Company, 1977.

Pasework, William R. and Mary Ellen Oliverio. Clerical Office Procedures,  
6th edition. Cincinnati: South-Western Publishing Company, 1978.

Stewart, Jeffrey R., Jr., et al. Office Procedures. New York: McGraw-  
Hill Book Company, 1980.

## UNIT XII

### SPECIALIZED OFFICE PROBLEMS

#### BANKING

#### INTRODUCTION

This unit is designed to review the background information on the various services of banks. It will also serve as an aid to the students in the development of competencies that are necessary to perform banking tasks.

#### COMPETENCY

Demonstrate the ability to communicate information accurately and to apply appropriate skills to complete the assigned tasks.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate the ability to use banking terms.
2. Exhibit the ability to arrange tasks in a bank in order of priority.
3. Develop skills necessary to perform banking tasks.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given background information, students will be able to define banking terms on a written test with at least 75 percent accuracy.
2. Given a schedule of daily activities in class, students will be able to arrange their tasks in the order of priority with at least 75 percent accuracy.
3. Given necessary information, students will be able to compose and type letters, memorandums, and reports in class with at least 75 percent accuracy.

4. Given necessary information in class, students will be able to complete banking forms with at least 75 percent accuracy.
5. Given a production test, students will be able to complete the tasks assigned within a given period of time with at least 75 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' understanding of bank services.
2. Visit a local bank to learn of services to community and the equipment used and make report to class. (Could be done in small groups.)
3. Invite a representative from the bank to speak to the class on employer expectations regarding beginning employees.
4. Collect free materials from banks to use as bulletin board displays.

#### METHODOLOGY

This unit is designed for independent study; however, it does provide for some group activities. Teacher lecture will also be used to reinforce the student activities.

#### UNIT OUTLINE

##### BANKING

- I. Review Background Information (See--Financial Records Unit).
  - A. Bank Services
    1. Checking account
    2. Savings account
    3. Loans
    4. Investments
    5. Safety deposit
    6. Trust
    7. Consumer services

- B. Terminology
1. Bank
  2. Check
  3. ABA transit number
  4. Non-sufficient funds (NSF)
  5. Passbook
  6. Deposit ticket
  7. Forged check
  8. Check protector
  9. Bank statement
  10. Raised check
  11. Endorsement
  12. Bank draft
  13. Stop payment

II. Skills and Tasks

- A. Determine priorities and make decisions
- B. Compose and type letters, memorandums, and reports
- C. File banking documents and correspondence
- D. Complete bank forms used by employees
  1. Teller's slips
  2. New account forms
  3. Deposit tickets--checking and savings accounts
  4. Checks
  5. Savings withdrawal request forms
  6. Transfer of funds forms
  7. Cash in and out forms
  8. Stop payment request forms

SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

1. Given background information, students will be able to define banking terms on a written test with at least 75 percent accuracy.

Subject Matter Content

Background information

Learning Activities

1. Compile a list of banking terms and present the list to the class.
2. Compose sentences using the banking terms from Activity 1.
3. Prepare a bulletin board using banking terms.
4. Complete the Scrambled Word Exercise reviewing banking terms. (Appendix A)

- 
2. Given a schedule of daily activities in class, students will be able to arrange their tasks in the order of priority with at least 75 percent accuracy.
- 

Subject Matter Content

Setting priorities

Learning Activities

1. Interview various workers in a bank and present to the class a list of tasks performed by each.
  2. Discuss in small groups the lists composed in Activity 1 and arrange tasks in order of priority.
  3. Present to class the new list worked out in Activity 2.
- 

3. Given necessary information, students will be able to compose and type letters, memorandums, and reports in class with at least 75 percent accuracy.
- 

Subject Matter Content

Skill improvement

Learning Activities

1. Collect various styles of business letters to show examples of proper and improper styles.
  2. Prepare bulletin board display showing various letter styles. Type any styles not collected in Activity 1 and use these also in the bulletin board display.
  3. Compose and type letters, memorandums, and reports from problem situations given by the teacher in rough draft form.
- 

4. Given necessary information in class, students will be able to complete banking forms with at least 75 percent accuracy.
-

Subject Matter Content

Learning Activities

Skill development and improvement

1. Collect forms used in banks and present them to the class.
2. Complete banking forms using problems furnished by the teacher.
3. Visit bank or listen to a presentation given by a bank representative on the employee's use of banking forms.
4. Prepare a bulletin board or poster display of banking forms.

- 
5. Given a production test, students will be able to complete the tasks assigned within a given period of time with at least 75 percent accuracy.
- 

Subject Matter Content

Learning Activities

Skill improvement

1. Take timed drills on completing banking forms supplied by teacher.
2. Write a report on the importance of speed and accuracy in performing banking tasks.
3. Type a simulated banking project provided by teacher.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Class participation grade
- \* Student project grade
- \* Group project grade

### EQUIPMENT AND SUPPLIES

#### Student

Textbook  
Notebook  
Instruction Sheets  
Letterheads  
Onion Skin Paper  
Plain White Paper  
Carbon Paper  
Banking Forms  
    Teller's slips  
    Deposit tickets--checking  
        and savings accounts  
    New account forms--check-  
        ing and savings  
        accounts  
    Cash in and out forms  
    Transfer of funds slips  
    Stop payment request  
        forms  
    Checks  
    Savings withdrawal  
        request forms  
Typewriter  
Calculator/Adding Machine  
Bulletin Board Supplies  
Pens  
Pencils

#### Teacher

Textbook and Manual  
Transparencies  
Overhead Projector  
Bulletin Board Supplies  
Filmstrips  
Filmstrip Projector  
Cassette Player  
Duplicator  
Pen  
Pencil

APPENDIX A  
BANKING TERMINOLOGY  
SCRAMBLED WORDS

Directions: Unscramble the words and place them in the blank provided.

- |                        |           |
|------------------------|-----------|
| 1. HECCK               | 1. _____  |
| 2. KOPSAOBS            | 2. _____  |
| 3. TEPDOSI CITTEK      | 3. _____  |
| 4. RGFEDO KEHCC        | 4. _____  |
| 5. CECHK RETTOPRODC    | 5. _____  |
| 6. NKAB TATSENMET      | 6. _____  |
| 7. AKBN FATRD          | 7. _____  |
| 8. POTS TAPYNME        | 8. _____  |
| 9. TESRENDEMON         | 9. _____  |
| 10. BAA RATNITS NUBMRE | 10. _____ |
| 11. SIREDA KHCEC       | 11. _____ |
| 12. KNAB               | 12. _____ |

Answers: 1. check 2. passbook 3. deposit ticket 4. forged check  
5. check protector 6. bank statement 7. bank draft  
8. stop payment 9. endorsement 10. ABA transit number  
11. raised check 12. bank

7-II-X

SUPPLEMENTARY MATERIALS

Filmstrips

The How and Why of Banking Series  
Young Executives Section  
Louisiana Bankers Association  
P. O. Box 2871  
Baton Rouge, LA 70821

Textbooks

Math for Business Careers  
ISBN: 0-07-031121-8, 1975  
Gregg & Community College Division  
McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

Secretarial Office Procedures  
ISBN: 0-538-11320-0, 1972  
South-Western Publishing Company  
11310-Gemini Lane  
Dallas, TX 75229

Workbook

The How and Why of Banking  
Young Executives Section  
Louisiana Bankers Association  
P. O. Box 2871  
Baton Rouge, LA 70821

## RESOURCES

Huffman, Harry, et al., Math for Business Careers. New York: McGraw-Hill Book Company, 1975.

Moon, Harry R., Office Procedures. Bronx, NY: Educational Publishers, 1981.

Warmke, Roman and Eugene Wyllie, Consumer Economic Problems. Cincinnati: South-Western Publishing Company, 1977.

The How and Why of Banking. A Teaching Guide. Baton Rouge: Young Executives Section, Louisiana Bankers Association, 1982.

## UNIT XII

### SPECIALIZED OFFICE PROBLEMS

#### INSURANCE OFFICE

#### INTRODUCTION

It is essential that today's students be given opportunities to relate their business education skills and know-how to realistic experiences in the classroom. Therefore, this unit is designed to provide the students with tasks performed by an insurance clerk.

#### COMPETENCIES

1. Demonstrate the ability to communicate accurately information relating to insurance.
2. Demonstrate the ability to apply appropriate skills to complete assigned insurance tasks.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate the ability to use insurance terms.
2. Exhibit the ability to arrange tasks in an insurance office in the order of priority.
3. Develop skills necessary to perform insurance tasks with speed and accuracy.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given background information, students will be able to define insurance terms on a written test with at least 75 percent accuracy.
2. Given an unarranged schedule of each day's activities in class, students will be able to arrange their work schedule with at least 75 percent accuracy.

3. Given background information, students will be able to compose and type letters, accident reports, and premium invoices in class with 100 percent accuracy.
4. Given background information, students will be able to complete insurance forms in class with 100 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Give a pretest to determine the students' understanding of insurance terminology and the types of insurance coverages available.
2. Visit local insurance agency to help students see the many facets of the insurance business.
3. Invite an insurance agent to speak to the class on skills expected by employers of beginning employees in an insurance office.
4. Small group of students will visit an insurance office and make a report to the class.

#### METHODOLOGY

This unit is basically designed for independent study. However, it does provide for some group activities to further aid students in the development of their skills. Teacher lectures will also be used to reinforce student activities.

#### UNIT OUTLINE

##### INSURANCE OFFICE

- I. Background Information
  - A. Types of insurance coverages
    1. life insurance
      - a. whole life (also known as straight life and permanent life)
      - b. term life
      - c. endowment life
      - d. limited-payment life
    2. health and accident insurance
    3. hospitalization insurance
    4. workmen's compensation

5. property insurance
  - a. fire and extended coverage
  - b. theft or burglary
  - c. wind damage
  - d. earthquake
  - e. fidelity
  - f. comprehensive liability
6. automobile insurance
  - a. comprehensive
  - b. collision
  - c. bodily injury
  - d. property damage
  - e. medical payments
  - f. uninsured motorist
  - g. no-fault insurance

B. Terminology

1. insurance
2. policy
3. premium
4. endorsement
5. deductible
6. appraisal
7. policy period
8. claim
9. lapse
10. economic risk
11. policyholder

II. Skills and Tasks

- A. Determine priorities and make decisions
- B. Compose and type letters and accident reports
- C. Type documents, memorandums, notices, premium invoices, changes in coverage (endorsement requests), voucher checks, index and ID cards from rough draft copies
- D. Compute premiums
  1. vehicle
  2. homeowners
- E. File and retrieve insurance documents
- F. Complete insurance forms
  1. accident statements
  2. memo forms
  3. voucher checks
  4. notices
  5. worksheets

## SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given background information, students will be able to define insurance terms on a written test with at least 75 percent accuracy.
- 

### Subject Matter Content

### Learning Activities

Background information

1. Write sentences using insurance terms.
  2. Match words with a list of definitions. (Appendix A)
  3. Prepare bulletin board using insurance terms.
- 

2. Given an unarranged schedule of each day's activities in class, students will be able to arrange their work schedule with at least 75 percent accuracy.
- 

### Subject Matter Content

### Learning Activities

Setting priorities

1. Interview a secretary in an insurance office and make a list of tasks performed.
  2. Discuss in small groups the list of tasks in Activity 1 and arrange the list in order of priority.
  3. Present to class the list from Activity 2.
  4. Prepare a bulletin board using tasks in an insurance office.
- 

3. Given background information, students will be able to compose and type letters, accident reports, and premium invoices in class with 100 percent accuracy.
-

### Subject Matter Content

Skill improvement

### Learning Activities

1. Compose and type letters, accident reports, and premium invoices from problems given by the teacher.
2. Compose and type a report on a dramatization of an accident presented in class or after viewing film of an accident.
3. Present the various versions of the accident to the class.
4. Prepare and type the premium invoices for several automobiles and homes. Use charts obtained from an insurance office.
5. Discuss in small groups the importance of speed and accuracy in completing tasks in an insurance office. Present findings to class.

- 
4. Given background information, students will be able to complete insurance forms in class with 100 percent accuracy.
- 

### Subject Matter Content

Skill development and improvement

### Learning Activities

1. Collect forms used in insurance offices and prepare a bulletin board display.
2. Visit insurance office or listen to a presentation given by a representative from an insurance office. Examine hand-out materials, and participate in related activities.
3. Add forms obtained in Activity 2 to the bulletin board display, if samples are not posted.
4. Complete insurance forms using information in problems supplied by teacher.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Quiz at end of each section on background information.
- \* Class participation
- \* Projects

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Instruction Sheets  
Office Manuals  
Typewriter  
Calculator/Adding Machine  
Letterheads  
Onion Skin Paper  
Plain White Paper  
Memorandum Forms  
Accident Report Forms  
Voucher Checks  
Notice of Cancellation Forms  
Endorsement Request Forms  
Envelopes  
Vehicle Rating Work Sheets  
10-Day Reminder Notices  
Index Cards and ID Cards  
Premium Invoices (Vehicle  
and Homeowners)  
Folders  
Pencils  
Pens

### Teacher

Textbook and Manual  
Bulletin Board Supplies  
Office Manuals  
Overhead Projector  
Transparencies and Supplies  
Folders  
Filmstrip  
Filmstrip Projector  
Pen  
Pencil

APPENDIX A

INSURANCE TERMINOLOGY

Directions: Write in the blanks the terms from column 2 that match the statements in column 1.

<u>Column 1</u>	<u>Column 2</u>
_____ 1. A modification or change in coverage after the issuance of the insurance policy.	Economic risk Insurance
_____ 2. An unexpected event such as a collision.	Policy Premium
_____ 3. The part of the insurance claim for which the policyholder is responsible.	Endorsement
_____ 4. The expiration of the policy.	Deductible
_____ 5. A common means of sharing risks.	Comprehensive
_____ 6. One who carries insurance.	Policy period
_____ 7. The amount paid for insurance.	Claim
_____ 8. A contract between one who buys insurance and the insurance company.	Lapse Policyholder
_____ 9. A demand by an individual for compensation from an insurance company.	Renewal Accident
_____ 10. An estimate of the value of property.	Depreciation Appraisal

APPENDIX A  
INSURANCE TERMINOLOGY

ANSWER KEY

1. Endorsement
2. Accident
3. Deductible
4. Lapse
5. Insurance
6. Policyholder
7. Premium
8. Policy
9. Claim
10. Appraisal

## SUPPLEMENTARY MATERIALS

### Film/Filmstrip

#### The Secretary--A Normal Day

(16 mm, 11 minutes, color)

Louisiana Dept. of Education  
Vocational Education Materials Center Library  
P. O. Box 44064  
Baton Rouge, LA 70804

Write to: Institute of Life Insurance, Educational Division,  
277 Park Avenue, New York, NY 10017 for catalog  
of titles of filmstrips and films.

### Textbooks

#### Applied Business Mathematics

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

#### General Business for Everyday Living

ISBN: 07-050800-3, 1972  
Gregg Division  
McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### Reference Manual for Office Employees

South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

#### Reference Manual for Stenographers and Typists

McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### Skill for Consumer Success

ISBN: 0-538-08100-7, 1981  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

#### Word Division Manual

Second Edition, 1970  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Simulation

The Insurance Clerk--An Office Simulation

ISBN: 0-538-25610-9, 1981

South-Western Publishing Company

11310 Gemini Lane

Dallas, TX 75229

426

XII-20

## RESOURCES

Huffman, Harry, et al.; Math for Business Careers. New York: McGraw-Hill Book Company, 1975.

Moon, Harry R., Office Procedures. Bronx, NY: Educational Publishers, 1981.

Morrison, Phyllis, The Business Office. New York: McGraw-Hill Book Company, 1978.

Warmke, Roman and Eugene Wyllie, Consumer Economic Problems. Dallas: South-Western Publishing Company, 1977.

## UNIT XII

### SPECIALIZED OFFICE PROBLEMS

#### LEGAL OFFICE

#### INTRODUCTION

For students seeking a career in the legal profession, provisions must be made to promote their interest and also improve their specialized skills in their chosen area of concentration. The COE student must possess basic skills along with some knowledge of related skills. This unit will focus on the special skills needed to function efficiently in the legal office.

#### COMPETENCIES

1. Develop skills needed to perform efficiently in the legal office.
2. Exhibit personal growth in the performance of special office duties that occur in the legal office.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Exhibit an understanding of legal terminology.
2. Demonstrate the ability to type from legal rough draft.
3. Prepare forms used in the legal office.
4. Improve performance in handling office tasks.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a test on legal terms, students will be able to spell, define, and compose sentences with 100 percent accuracy.
2. Given a corrected copy using legal proofreader's marks in class, students will be able to produce mailable copy.
3. Given a mortgage form to type in class, students will be able to correctly complete the form with 100 percent accuracy.

4. Given in class the necessary information needed to complete a will, students will be able to type and assemble the document with 100 percent accuracy.
5. In a classroom simulated office, students will be able to demonstrate the procedures of preparing for an office meeting using a checklist for evaluation with 100 percent accuracy.
6. In a group discussion, students will be able to suggest at least two ways to contact, in case of an emergency, the employer who is absent from the office.
7. Given a list of business transactions in class, students will be able to handle the transactions with 100 percent accuracy.

#### SUGGESTED INTEREST APPROACHES

1. Give a pre-test to determine levels of ability to perform in a legal office.
2. View films involving activities associated with a legal office.
3. Invite attorneys to speak on the qualifications needed to work in a legal office.
4. Invite a court reporter to speak on responsibilities involved in their profession.

#### METHODOLOGY

This unit is designed to focus on the skills and qualifications needed to perform in a legal office. The activities are designed with the purpose of building interest and skills in this area. Teacher lecture will provide information to support the activities listed.

#### UNIT OUTLINE

##### LEGAL OFFICE

- I. Specialized Terminology
  - A. Common legal terms
  - B. Legal proofreader marks

## II. Specialized Documents and Duties

- A. Document preparation
  - 1. Mortgages/deeds
  - 2. Wills
  - 3. Contracts
- B. Special office duties
  - 1. Prepare for meetings
  - 2. Handle problems during employer's absence
  - 3. Maintain financial records

### SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given a test on legal terms, students will be able to spell, define, and compose sentences with 100 percent accuracy.
- 

#### Subject Matter Content

Legal terminology

#### Learning Activities

1. Participate in a spelling bee as a means of improving spelling ability.
2. Match definitions with terms on a worksheet. Check answer sheet for correctness. (Appendix A)
3. Prepare sentences using legal terminology. Have student check and discuss use of terminology.

- 
2. Given a corrected copy using legal proofreader's marks in class, students will be able to produce mailable copy.
- 

#### Subject Matter Content

Practicing proofreading

#### Learning Activities

1. Identify proofreader's marks used in a legal office from teacher supplied material.
2. Type from rough draft copy. Check typed copy with key.
3. Proofread document using proofreader's marks. Check correctness from master copy.

- 
3. Given a mortgage form to type in class, students will be able to correctly complete the form with 100 percent accuracy.
- 

Subject Matter Content

Learning Activities

Preparing mortgages

1. Discuss in small groups information used in the preparation of a mortgage. Prepare a master list of information to be included.
  2. Research forms used in preparing mortgages. Discuss findings in class.
  3. Prepare a bulletin board illustrating mortgage forms.
  4. Type a practice job using a mortgage form supplied by teacher.
- 

4. Given in class the necessary information needed to complete a will, students will be able to type and assemble the document with 100 percent accuracy.
- 

Subject Matter Content

Learning Activities

Preparing wills

1. Research information needed to draft a will. Present report to the class.
2. Prepare a personal, handwritten will.
3. Type a copy of a will from information provided by teacher.
4. Assemble all pages and prepare the cover or binder for the will completed in Activity 3.

- 
5. In a classroom simulated office, students will be able to demonstrate the procedures in preparing for an office meeting using a checklist for evaluation with 100 percent accuracy.
- 

Subject Matter Content

Preparing for meetings

Learning Activities

1. Prepare a room for a meeting. Evaluate using a checklist. (Appendix B)
  2. Prepare an agenda for a meeting. Present to class.
  3. Attend a club meeting and take minutes. Transcribe on typewriter and compare completed minutes with transcript.
- 

6. In a group discussion, students will be able to suggest at least two ways to contact, in case of an emergency, the employer who is absent from the office.
- 

Subject Matter Content

Employer's absence

Learning Activities

1. List reasons why employer may need to be contacted and the problems which may arise if unable to make contact. Present list to class.
2. Prepare a telegram used as a means of contacting employer briefly stating reason for emergency.
3. Role play emergency situations which may arise during an employer's absence.

- 
7. Given a list of business transactions in class, students will be able to handle the transactions with 100 percent accuracy.
- 

Subject Matter Content

Learning Activities

Handling finances

1. Post in-coming checks to the proper ledgers. Compare with completed checks on overhead projector.
2. Prepare a deposit slip and check accuracy with manual.
3. Type checks and post to proper account ledgers. Check for accuracy.
4. Balance office checkbook. Check for accuracy.
5. Reconcile a bank statement. Check for accuracy.
6. Prepare bulletin board using students' completed work in Activities 1-5.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Performance test
- \* Class participation

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Pen/Pencil  
Correction Supplies  
Typewriter  
Bulletin Board Supplies  
Adding Machine/Calculator  
Dictaphone  
Cassette Player and Tapes  
Telephone Simulator  
Copy Machine  
Hand Stapler  
Checkwriter  
Legal Forms  
Date Stamp  
Checklists

### Teacher

Textbook and Manual  
Teacher-made Tests  
Evaluation Sheets  
Checklists  
Overhead Projector  
Transparencies  
Transparency Pens

APPENDIX A  
COMMON LEGAL TERMS

Match the following definitions with the words listed below. Use the letter of the word listed by placing it in the blank provided to correctly match the word with the definition.

- |           |   |                  |
|-----------|---|------------------|
| 1. _____  | Written testimony taken under oath outside the courtroom.   | A. Sua Sponte    |
| 2. _____  | Court order requiring the person to whom it is directed to perform or refrain from performing an act.                             | B. Action        |
| 3. _____  | Surrender of an accused criminal by one state to another state.   | C. Adjudicate    |
| 4. _____  | Serious crime usually punishable by imprisonment.   | D. Moot          |
| 5. _____  | On one's own will or voluntarily.   | E. Statutory Law |
| 6. _____  | A legal proceeding or suit in a court of law whereby one seeks relief or recovery from another for an injury or a violated right. | F. Deposition    |
| 7. _____  | Law which has been created by statute in the legislature.   | G. Injunction    |
| 8. _____  | To decide a case by law.  | H. Extradition   |
| 9. _____  | Something which can be debated, argued, or discussed.   | I. Averment      |
| 10. _____ | A declaration positively stating that the facts are true.   | J. Felony        |

APPENDIX A

ANSWER KEY

1. F
2. G
3. H
4. J
5. A
6. B
7. E
8. C
9. D
10. I

XII-31

436

APPENDIX B

EVALUATION CHECKLIST FOR PREPARATION OF MEETING ROOM

Did Student:

Have agenda prepared?

Provide ashtrays (if applicable)?

Provide note paper?

Provide pencil/pen?

Establish seating arrangement?

Prepare to take minutes?

Provide coffee/refreshment?

Provide a copy of Robert's Rules of Order,  
bylaws, etc.

Greet and seat each member pleasantly?

Provide necessary equipment?

Yes	No

SUPPLEMENTARY MATERIALS

Textbooks/workbooks from:

Southwestern Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

- #L-21 Applied Business Law.
- #L-22 Consumer Law
- #L-23 Family Law
- #L-24 Students' Rights and Responsibilities.
- #L-25 Tort Law
- #L-26 Criminal Law

It's the Law

- #N60 - Textbook
- #N60M - Teacher's Manual

The Auditing Clerk

- #Y01 - Textbook/workbook
- #Y01M - Teacher's Manual

Century 21 Shorthand Legal Dictionary

- #R-16

The Legal Secretary

- #Y66 - Office Job Simulation
- #Y666 - Dictation/Transcription Cassettes

Legal Office Typing

- #K-58 - Textbook

## RESOURCES

Bates, Marjorie D. and Mary C. Casey. Legal Office Procedures.  
St. Louis: McGraw-Hill Book Company, 1975.

Keeton, Martha and Melissa Briscoe. CATALOG OF PERFORMANCE OBJECTIVES,  
CRITERION-REFERENCED MEASURES AND PERFORMANCE GUIDES FOR LEGAL  
SECRETARY AND COURT REPORTER. Vocational Technical Education  
Consortium of States. University of Kentucky, 1976.

Morrison, Phyllis G. The Business Office. Dallas: Gregg Division,  
McGraw-Hill Book Company, 1978.

Roderick, Wanda W. Legal Studies: To Wit. "Basic Terminology and  
Transcription." Cincinnati: South-Western Publishing Company,  
1979.

Schatz, Anne E. and Olive D. Church. Office Systems and Careers.  
Boston: Allyn and Bacon, Inc., 1981.

## UNIT XII

### SPECIALIZED OFFICE PROBLEMS

#### MEDICAL OFFICE

#### INTRODUCTION

People in business are looking for workers who can adapt to office tasks the skills learned in school. This unit will provide an opportunity for students to refine their skills and apply them to medical situations.

#### COMPETENCIES

1. Develop an awareness of the environment in a medical office.
2. Identify the legal responsibilities of the medical office worker.

#### GENERAL PERFORMANCE OBJECTIVES/GOALS

1. Demonstrate a knowledge of the vocabulary used in medical offices.
2. Handle tasks in the medical office responsibly.
3. Handle legal matters efficiently.

#### SPECIFIC PERFORMANCE OBJECTIVES AND MASTERY CRITERIA

1. Given a test, students will be able to spell and use correctly in sentences common medical terms with at least 80 percent accuracy.
2. Given simulated office tasks, students will be able to type medical forms and letters with at least 90 percent accuracy.
3. Given a list of medical office tasks, students will be able to rank tasks in order of priority with at least 80 percent accuracy.
4. On an objective test, students will be able to identify legal responsibilities of the medical office worker with at least 75 percent accuracy.

## INTEREST APPROACHES

1. Give pretest to determine the typing ability and knowledge of the student.
2. Provide samples of medical forms to be used with this unit.
3. Invite a medical secretary to talk on "The Duties of the Medical Secretary."

## METHODOLOGY

This unit has been designed to adapt office skills to medical tasks. A variety of medical problems will be provided. Teacher lecture will be used to convey information not covered elsewhere in unit. Office simulations will be used to provide a realistic approach to such jobs.

## UNIT OUTLINE

### MEDICAL OFFICE

#### I. Medical Terminology

- A. Common terms
- B. Common abbreviations

#### II. Medical Office Typing Tasks

- A. Patient case history
- B. Discharge summaries
- C. Insurance forms

#### III. General Medical Office Tasks

- A. Appointments
- B. Answering the phone
- C. Greeting patients

#### IV. Accounting Procedures

- A. Pegboard
- B. Ledger sheets
- C. Daily log
- D. Billing procedures

441

## V. Legal Obligations in the Medical Office

- A. Privileged communications
- B. Authorizations for release of records information
- C. Malpractice
- D. Patient's financial obligations

### SPECIFIC PERFORMANCE OBJECTIVES AND LEARNING ACTIVITIES

- 
1. Given a test, students will be able to spell and use correctly in sentences common medical terms with at least 80 percent accuracy.
- 

#### Subject Matter Content

Medical terminology

#### Learning Activities

1. Listen to a recording of medical terms and practice pronouncing the terms.
2. Choose terms from the recording and write the shorthand outline for each.
3. Prepare a notebook of unfamiliar medical terms, compile, and give a copy to each member of the class.
4. Use a dictionary to find the meanings of a list of root words used in medical terminology. (Appendix A)
5. Write 10 sentences using medical terms from notebook prepared in Activity 3.

- 
2. Given simulated office tasks, students will be able to type medical forms and letters with at least 90 percent accuracy.
- 

#### Subject Matter Content

Medical office typing

#### Learning Activities

1. Type an insurance form to be sent to a patient.

## Medical office typing

2. Type a cover letter to accompany the insurance form prepared in Activity 1.
3. Type a discharge summary from patient records.
4. Type a medical history from taped dictation.
5. Type a records' release-of-information form from rough draft.
6. Type a Workmen's Compensation form.
7. Type a request for Medicaid payment form.
8. Exchange papers and check the forms and letters after the completion of the preceding seven activities.

- 
3. Given a list of medical office tasks, students will be able to rank tasks in order of priority with at least 80 percent accuracy.
- 

### Subject Matter Content

Medical office tasks

### Learning Activities

1. Prepare a daily appointment sheet.
2. Complete a patient's charge slip and post on the daily log sheet.
3. Post patient charges on ledger sheets.
4. Complete a ledger card for a patient with Medicaid.
5. Prepare monthly statements from ledger sheets used in Activity 3.
6. Exchange papers from Activities 1-4 and obtain peer evaluation.

Medical office tasks

7. Role play in teams a telephone conversation between patient and secretary. Rate the secretary using checklist. (Appendix B)
8. Role play in teams office situations involving a patient who is having a problem with monthly statements. Rate the secretary using checklist. (Appendix B)

- 
4. On an objective test, students will be able to identify legal responsibilities of the medical office worker with at least 75 percent accuracy.
- 

Subject Matter Content

Legal responsibilities

Learning Activities

1. Discuss case studies (provided by teacher) in small groups and present group findings\*to the class.
2. Prepare bulletin board on the medical secretary's legal responsibilities.
3. Have a legal secretary speak to the class on legal responsibilities.
4. Interview an attorney concerning legal responsibilities of medical office workers and report findings to the class.

## EVALUATION AND TESTING

### Ways to Evaluate Pupil Growth

- \* Unit test
- \* Class participation grade
- \* Production test
- \* Student rating sheets

## EQUIPMENT AND SUPPLIES

### Student

Textbook  
Notebook  
Rating Sheets  
Pencil/Pen  
Typing Paper  
Typing Eraser  
Carbon Paper  
Onion Skin  
Word Division Guide  
Pegboard  
Ledger Sheets  
Typewriter  
Simulation Set  
Medical Dictionary  
Shorthand Dictionary

### Teacher

Textbook and Manual  
Rating Sheets  
Transcribing Machines  
Cassette Tapes  
Sample Forms  
Recording Media

APPENDIX A

Write the meaning of the following root words in the blanks provided.

1. hem \_\_\_\_\_
2. cephal \_\_\_\_\_
3. bronch \_\_\_\_\_
4. gastr \_\_\_\_\_
5. trache \_\_\_\_\_
6. rhin \_\_\_\_\_
7. phleb \_\_\_\_\_
8. ophthalm \_\_\_\_\_
9. nephr \_\_\_\_\_
10. laryng \_\_\_\_\_
11. therap \_\_\_\_\_
12. myel \_\_\_\_\_
13. scler \_\_\_\_\_
14. vuls \_\_\_\_\_
15. derm \_\_\_\_\_

APPENDIX A

ANSWER KEY

1. blood
2. head
3. windpipe
4. stomach
5. windpipe
6. nose
7. vein
8. eye
9. kidney
10. larynx
11. treatment
12. marrow
13. hard
14. pull
15. skin

APPENDIX B  
STUDENT RATING SHEET

Directions: Place a check under the columns which indicates the appropriate rating for the characteristic indicated in the left column.

RATINGS

- 5-Superior  
4-Excellent  
3-Average  
2-Good  
1-Poor

	Superior	Excellent	Good	Average	Poor
Courteous	_____	_____	_____	_____	_____
Showed Interest	_____	_____	_____	_____	_____
Was Helpful	_____	_____	_____	_____	_____
Pleasant Voice	_____	_____	_____	_____	_____
Choice of Words	_____	_____	_____	_____	_____
Tactful	_____	_____	_____	_____	_____
Complete Information Given	_____	_____	_____	_____	_____

Comments \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## SUPPLEMENTARY MATERIALS

### Cassettes

#### The Medical Secretary

Y676 Dictation/Transcription cassette  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

#### Medical Office Procedures

87646-0 simulation recording--stenographic  
87647-9 simulation recording--nonstenographic  
Gregg McGraw-Hill Book Company  
P. O. 996  
Norcross, GA 30091

### Textbooks

#### Medical Office Procedures

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### The Medical Secretary: Terminology and Transcription

Student's transcript  
Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### Medical Typing Practice

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### Typing Medical Forms

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

#### The Medical Secretary

Office Job Simulation Y67  
South-Western Publishing Company  
11310 Gemini Lane  
Dallas, TX 75229

Miscellaneous

Gregg Medical Shorthand Dictionary

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

10,000 Medical Words Spelled and Divided for Quick Reference

Gregg McGraw-Hill Book Company  
P. O. Box 996  
Norcross, GA 30091

450

XII-45

## RESOURCES

Cooper, Marian G. and Miriam Bredow. The Medical Assistant. New York: McGraw-Hill Book Company, 1978.

Eshom, Myreta. Medical Secretary's Manual. New York: Meredith Publishing Company, 1966.

Kabbes, Elaine F. Medical Secretary's Guide. West Nyack: Parker Publishing Company Inc., 1967.

Morrison, Phyllis C. The Business Office. New York: McGraw-Hill Book Company, 1978.

Reschke, Elaine M. The Medical Office. New York: Harper & Row Publishers, 1975.

Root, Kathleen Berger and Edward E. Byers. Medical Typing Practice. New York: McGraw-Hill Book Company, 1967.