ABSTRACT

ANALYSIS OF IN-COMPANY AND OUT-OF-COMPANY
EDUCATIONAL AND TRAINING PRACTICES FOR CLERICAL WORKERS
OF LEADING FIRMS IN THE GREATER BOSTON AREA

by

Eleanor Hollis Tedesco

The Problem

The problem of this study was concerned with (1) the present and future status of company training for clerical workers among firms in the Greater Boston area, (2) descriptions of formal training programs that these companies provide for their clerical workers, and (3) descriptions of formal training programs conducted by out-of-company agencies that these companies reported using in training their clerical workers.

Procedures

Data concerning present and future training practices were obtained from managerial personnel representing 645 companies responding by mail or by telephone to a questionnaire, with 606 companies providing usable mail questionnaires. Items studied involved training methods, tuition aid practices, and future training plans and needs. These data were reported in statistical summaries classified by each company's industry, total employee size, and/or clerical employee size.

Data concerning the structure of formal training programs for clerical employees were obtained from personal interviews with personnel in charge of administering and/or instructing in the

clerical training function, supplemented by observing and/or participating as a trainee in training sessions and by using printed or office duplicated materials supplied by interviewees. Thirty-eight companies with these programs were selected for case analysis. Each case study generally included an overview of a company's clerical training function; a description of its in-company formal clerical training activities according to purpose, administration and organization, objectives, content, and implementation; and a description of its out-of-company training activities according to tuition aid practices and other outside agencies utilized in training clerical workers. Twelve out-of-company agencies that companies reported using in training their clerical workers were also selected for case analysis. Each of these case studies described an out-of-company agency in terms of its function(s) and training activities being offered and/or planned for clerical workers. Volume I contains the problem and findings of the study; Volume II, the case studies.

Conclusions

The following conclusions have been drawn from an analysis of the findings of the study:

1. Businessmen are concerned about maintaining and improving the efficiency of their clerical work force.
2. Companies prefer to train clerical workers by using one or more on-the-job training techniques rather than by employing outside training agencies or by conducting in-company formal training programs.

3. The larger a company's clerical force the more likely the company is to provide clerical workers with (a) full or partial tuition aid for evening school or college courses, (b) in-company formal training programs, and (c) training provided by out-of-company agencies.
4. Formal training programs conducted by companies and by outside agencies generally focus upon workers' or an individual company's immediate clerical training needs rather than upon helping workers prepare for job advancement or for meeting long-range company goals.
5. Duplication exists between course offerings of educational institutions and other out-of-company training agencies and in-company formal training programs of business firms in areas of skill development and general education.
6. A gap exists between clerical training provided in schools and clerical training required for on-the-job performance.
7. The effect of technological changes upon clerical job requirements indicates a need for training in data processing and in technical secretarial skills.
8. The number of companies with substantial formal training programs for clerical workers is distinctly small.
9. In-company formal training programs often include some form of supervised on-the-job training or simulated office experience.

10. Many companies that conduct formal training programs do not utilize research methods in planning and developing their programs and do not evaluate and follow-up their training efforts in any way.
11. There is a lack of valid evidence concerning the value of training programs.

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By

Eleanor Hollis Tedesco

In Two Volumes
Volume I: The Problem and Findings

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CHAPTER I

INTRODUCTION

Each sector of our economy--both public and private--depends upon the functions of the office for successful performance of its objectives. The office has become the focal point through which the operations of an organization are facilitated and coordinated. Growth of the number of clerical workers from 877,000 in 1900 to more than 10 million in 1960, whereas the total labor force rose only from 29 million to about 68 million during the same period,[1] indicates not only the growth of American business but also the increasing importance of the office.

Increasing reliance of business organizations upon the functions of the office tends to be accentuated by the effect of continuously changing and mutually interacting organizational, environmental, and economic factors upon the organization's survival and growth. Efficiency of the office functions tends to be dependent upon the effectiveness and competence of the clerical staff--workers engaged in the facilitating and coordinating functions of the office. But current productivity, employment, research and development, and

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[1]U. S., Bureau of Labor Statistics, Manpower Report of the President and A Report on Manpower Requirements, Resources, Utilization, and Training, (1963), p. 201.

changing technological trends are creating serious problems with regard to changes in office activities and to shortages of trained clerical workers. Such a situation could threaten the satisfactory operation of the office and thus impede the success of American business and the nation's security and goals.

A major means of helping to alleviate problems concerned with changing office activities and shortages of trained office personnel is through education and training. Preparation for an office position has become a continuous process which begins in the schools prior to employment and needs to continue for the duration of the employee's on-the-job productivity. The entire job of training for business cannot possibly be accomplished by the schools. Business organizations also must participate actively in the training process. If educators and businessmen are to achieve the desired results, "strong support, even leadership and follow-through, on the part of business and industry must be interlinked with teacher initiative and educational know-how, if hoped for results are to be achieved . . . ."[2]

Statement of the Problem

As a part of the continuous process of developing a more effective training function, it is necessary to determine to some extent

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[2]Education for Office Employment, Proceedings of a Problem-Solving Conference Held in Alexandria, Virginia (Willow Grove, Pennsylvania: National Office Management Association, 1963), p. 6.

the current training situation in business and to attempt to predict possible future training needs.

This study assesses current company training practices and future changes that were expected or were thought to be needed to take place in the near future with respect to the training of clerical workers of all leading firms in the Greater Boston area.

The first aspect of the problem concerned the present status of company training for clerical workers among firms in the Greater Boston area, including identification of those changes which employers were planning or thought to be desired or needed in the near future concerning the development of company training for clerical workers.

The second aspect of the problem concerned descriptions of formal training programs that companies were providing for their clerical workers. A case study of each program was sought in terms of identifying purposes, administration and organization, objectives, content, and means of implementation.

The third aspect of the problem concerned descriptions of formal training programs conducted by out-of-company agencies that companies reported using in training their clerical workers. A case study of each out-of-company agency was sought in terms of identifying its over-all function(s) and its training activities for clerical workers with regard to purposes, administration and organization, objectives, content, and means of implementation.

Purposes of the Study

The general purpose of this study was to provide businessmen and business educators with data concerning company educational and training procedures for clerical workers. More specifically, the purposes of the study were:

1. To provide businessmen with an over-all pattern of the current status of company training for clerical workers as a basis for examining and evaluating their own training practices in terms of current practices and desired practices.

2. To provide those company personnel concerned with the training of clerical workers with case examples of formal training practices that are currently being conducted for clerical workers.

3. To inform business educators about those training programs companies needed for their clerical workers.

4. To acquaint business educators with current training procedures that are being used by companies in order to provide a basis for interchanging ideas with businessmen.

5. To add to the general knowledge of training programs for clerical workers.

6. To identify general trends in the area of company training for clerical workers.

Need for the Study

The need for a study of company training practices for clerical workers is apparent when consideration is given to the following facts:

1. The pattern of labor force growth is changing the composition of the supply of office personnel.

2. The scarcity of trained clerical office workers is increasing.

3. The changes in technology are affecting the activities of clerical office workers.

4. There is little published information regarding training activities conducted by businesses for clerical office workers.

The Changing Composition of the Supply of Clerical Office Workers

The pattern of labor force growth is changing the composition of the supply of office personnel. The United States Department of Labor estimates that from 1960 to 1975 the labor force is expected to increase from 73 million to 93 million--a net increase of 27 per cent. Two-thirds of this net increase in the labor force represents young people under 25 years and adult women over 25 years entering the labor force.[3] At the same time the number of clerical workers will rise from approximately 15 per cent to 16 per cent of the working population--an increase of 4 million workers.[4] This prospective net change in employment only partially indicates future manpower requirements. Replacement needs will also create a large additional demand for clerical workers, as employee turnover is high among this particular group of workers.

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[3]U. S., Bureau of Labor Statistics, Occupational Outlook Handbook, (1963-1964 Edition), p. 13.

[4]U. S., Bureau of Labor Statistics, Manpower Report of the President and A Report on Manpower Requirements, Resources, Utilization, and Training, (1964), p. 244.

These labor force trends indicate that business will need to employ a large proportion of young and inexperienced workers as clerical employees and can expect a high turnover rate among them. Employers will find that these workers will require additional preparation to meet the requirements for efficient office work. As a result, businesses will need to provide more and better job training procedures in order to train these workers to satisfactory levels of skill.[5]

> In a real sense, the nation's ability to achieve rapid progress will depend on the success with which businesses measure up to this challenge of training, developing and providing opportunities for the great influx of young people into useful employment during the rest of the decade.[6]

Older women who return to work with a background of experience and training will often need refresher training in order to compete successfully with other employees.[7] Many young people and adult women will choose to work part time.[8] The Commissioner of Labor Statistics of the United States Department of Labor states ". . . that perhaps as many as one-third of the additional jobs which will be developed in the economy between now and 1970 will be

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[5]U. S., Bureau of Labor Statistics, Manpower Challenge of the 1960s, (1961), p. 14.

[6]"Education by Business," Business in Brief, No. 47 (November-December, 1962), p. 7.

[7]Manpower Report of the President, (1964), op. cit., p. 138.

[8]Manpower Challenge of the 1960s, op. cit., p. 19.

part-time jobs . . . ."[9] These workers will require training especially adapted to their needs.

Company training programs will perform an indispensable role as a result of the growth and the changing composition of the supply of office personnel. Employers will need to re-examine and strengthen their clerical training procedures and to investigate new training methods and facilities in order to fully utilize these new labor force entrants.

The Scarcity of Trained Clerical Office Workers

Although the labor force is growing at an unprecedented rate, demand for trained clerical personnel often exceeds the available supply. This shortage has existed in varying degrees since World War II. Problems related to the clerical shortage are qualitative as well as quantitative. The main reasons for this continuing situation are: (1) the increasing volume of paperwork necessary in business and government operations, (2) the low birth rate of the late 30's and the early 40's, (3) the demand for new kinds of skills caused by data processing, and (4) the tendency for increasing proportions of high school youths to obtain college training and to prepare for positions with more prestige and opportunity than clerical ones. More jobs could be filled if some of the unemployed or the underemployed were given the necessary training.

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[9]Ewan Clague, "Wealth and Welfare in the 1960's," (Paper read before the Annual Meeting of the National Conference of Catholic Charities, Atlantic City, New Jersey, September 15, 1962), p. 9.

Serious shortages of clerical employees are occurring among such groups as machine operators, typists, stenographers, and secretaries. "It is estimated that by 1965, even with automation, there will be a shortage of some 600,000 office workers."[10] The major step that employers have taken to overcome the shortage is to develop training programs. Many firms are conducting such activities as training inexperienced employees in the necessary skills, retraining older employees, and training present employees for higher positions.

In a study concerning the recruiting and the selection of office employees, the Chief of the Management Testing Unit of the United States Civil Service Commission reports that the shortage of skilled office employees has caused about 25 per cent of 320 employers to maintain formal training programs for inexperienced office employees. He concludes that

> the expense and the effort required to establish these programs is one further indication of the extreme shortage of office employees and the need for special efforts if vacancies are to be filled promptly and quality standards are to be maintained.[11]

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[10]L. M. Collins, "The Clerical Worker of the Future," The Clerical Program in Business Education, The American Business Education Yearbook, The National Business Teachers Association and The Eastern Business Teachers Association (Somerville, N. J.: Somerset Press, Inc., 1959), Vol. 16, pp. 83-84.

[11]Milton M. Mandell, Recruiting and Selecting Office Employees (New York: American Management Association, 1956), p. 54.

According to a survey by John A. Patton Management Engineers, Inc., the work productivity of office employees is reported to be between 30 to 50 per cent of required output.[12] Many business leaders suggest increasing the productivity of present employees through the process of company training to minimize the shortage of clerical workers. This possible solution is implied in a statement made by the Staff Director of the Educational Division of the National Office Management Association:

> Frequently a company does not actually need more workers in this category (although it may think it does), what it actually requires is more productivity from its present staff. To the degree that production can be increased, the demand for additional clerical workers will be decreased and the shortage situation eased. Concerted, sustained action by all companies in this direction could conceivably eliminate all serious shortage among clerical workers for a long time--and perhaps even permanently.[13]

DePhillips, Berlinder, and Cribbin, Professors of Management and Industrial Relations at New York University, indicate that the consensus of many writers about labor shortages centers around one cause and one apparent solution:

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[12]Fred A. Schultz, "Recent Developments in Office Management," American Business Education, Vol. XV, No. 4 (May, 1959), p. 246.

[13]T. W. Kling, "Supply and Demand for Clerical Workers," The Clerical Program in Business Education, The American Business Education Yearbook, The National Business Teachers Association and The Eastern Business Teachers Association (Somerville, N. J.: Somerset Press, Inc., 1959), Vol. 16, p. 23.

> The cause is either lack of training programs or not enough training programs. The solution--greater attention on the part of American industry to the huge educational task facing it and the need for an increasing effort in this direction if the shortages are not to hamper our industrial growth. Of course, training programs are not going to solve all the employee-shortage problems. Neither are they going to make business firms that are foundering into successful enterprises. The important thing to consider is that training in industry requires the same intelligent, purposeful effort that goes into technological improvement. Certainly, if a company is to achieve its maximum growth, it must recognize that it has a definite responsibility to train and develop its employees for new skills and for greater responsibilities.[14]

The Personnel Director at St. Luke's Hospital, Milwaukee, Wisconsin, also advocates using training to reduce or to eliminate problems regarding finding, satisfying, and keeping clerical workers:

> . . . it takes sizeable amounts of time, money and effort to place a clerical employee; training is but an effort to protect that investment. Today there is a critical shortage of this type of personnel. To find and develop these people requires the finest effort of today's alert training forces.[15]

With a growing demand for office personnel and with a diminishing supply of these workers, cooperative action is essential in allaying any shortages that might have adverse effects upon business or the country's economy. Although no panacea exists for solving the

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[14]Frank A. DePhillips, William M. Berlinder, and James J. Cribbin, Management of Training Programs (Homewood, Illinois: Richard D. Irwin, Inc., 1960), p. 262.

[15]John A. Witt, "Are We Overlooking Something?--Yes, Clerical Training," Journal of the American Society of Training Directors, Vol. 15 (January, 1961), pp. 34-35.

clerical shortage situation, proper utilization of training procedures by business is and will be a major means of helping to eliminate this problem.

The Changes in Office Activities

Within the next few years automation is expected to have an even greater impact upon the office. Electronic data processing and other laborsaving devices need to be employed in order to handle the increasing volume and complexity of recordkeeping and communications of business operations.

Evidence of the growth of paperwork is indicated by the increase in clerical employment. Today clerical workers are the second largest occupational group in the nation's labor force. The counteracting effect of automation will only retard the rate of clerical growth; in some cases, the use of automated equipment may increase, rather than reduce, the number of persons required. As one labor specialist indicated, "If computers and similar devices had not been developed, U. S. industry would have literally been buried under a mass of paperwork by now."[16]

Automation and other technological innovations are eliminating many routine elements of office jobs.

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[16]Larston D. Farrar, "Forecast '62," Administrative Management Vol. XXIII, No. 1 (January, 1962), p. 18.

> Electronic data processing is having its greatest effects on detailed, repetitive manual work in functions such as accounting, addressing, billing, inventory control, payrolls, and other recordkeeping. Many clerical occupations--especially those of a service character, such as bank teller, complaint clerk, receptionist, and secretary--continue unaffected by automation.[17]

Yet the work requirements of even the service-type postions are being changed to some extent by the introduction of new office machines. These shifts in manpower requirements have serious implications for the education and training of the present and the future work force.

The growing complexity of many jobs stresses the need for companies to provide training and retraining for new and for experienced clerical workers. The Corporate Trust Officer of the Chemical Bank New York Trust Company comments:

> Personnel changes are not needed to meet the demands of automation. Rather, the workers' skills must be elevated. Management is responsible for providing the plans and facilities that will train workers in the new techniques necessary to operate successfully under automated systems.[18]

Thus, training is necessary in helping to satisfactorily adjust technological changes to the labor supply and to the labor demand. The Deputy Assistant Secretary for Standards and Statistics, United States Department of Labor, states:

> Training is the link between labor supply and labor demand. The technological potential can be realized only if the labor supply in kind and numbers is adapted to

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[17]Manpower Report of the President, (1964), op. cit., p. 62.

[18]Clayton M. Nicholson and Richard Kelly, "Are Standard Clerical Skills Suited to Today's Automated Offices?" Administrative Management, Vol. XXII, No. 11 (November, 1961), p. 12.

> labor requirements. Individual potentials and satisfactions, under any given set of technological facts, are likely to be maximized under such circumstances. Technological unemployment can be minimized by a flexibly trained labor force capable of meeting the job requirements of a changing technology.[19]

Although business and education leaders recognize that training is a major means in helping to derive maximum benefits from these technological changes, a gap exists between training given in schools and training required by businesses. John Diebold, a recognized authority on automation, says:

> Automation is widening the gap between many of the skills taught in school and those demanded by the world of work. Some of the blame can be placed on industry. Its efforts to keep schools informed of needed skills have been meager indeed. It is also true that educators themselves frequently have lagged in their efforts to find out the needs of industry and the professions.[20]

At a one-day seminar conducted by the National Office Management Association concerning the impact of automation on training office employees, Jeff Coats, as President of the Professional Sales Development Company, in the concluding summary talk points out:

> The office is in a process of change. We know that. But we do not yet have full knowledge of the training needs that this change is creating, and will create . . . .

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[19]Charles D. Stewart, "Social Implications of Technological Progress," Impact of Automation (Washington, D. C.: U. S. Government Printing Office, November, 1960), p. 13.

[20]John Diebold, "Automation: Its Implications for Counseling," A reprint from the Occupational Outlook Quarterly (Washington, D. C.: U. S. Government Printing Office, September, 1962), p. 3.

> We need more cooperation between industry and education in the matter of training and education for the office of tomorrow.[21]

To meet the challenges of "Industrial Revolution II," Arthur J. Goldberg, former Secretary of Labor, states:

> One of the most important lessons learned thus far is that the need for training and retraining the work force exists across the board in American life. No employer or employee is exempt from the need, and each ignores it at his own cost.
>
> It is evident, also, that no master plan can be drawn for lifting the skills of a work force as varied and diverse as ours. The situation in each community, and within each industry, requires its own devices and tools. What each does have in common is the need for maximum cooperation among important segments of the community--education, business . . . .[22]

As the speed of innovation increases, the job of training becomes more complex and more important. Changing office activities indicate the extent of the growing dependence of efficient office operations upon continuous training. Determination of the training procedures that business now is using and is contemplating using should reveal changes occurring in office activities and possible training needs for clerical office workers.

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[21]Impact of Automation on the Training of Present and Future Office Employees, Proceedings of a Problem-Solving Seminar Held in New York (Willow Grove, Pennsylvania: National Office Management Association, 1962), p. 62.

[22]Arthur J. Goldberg, "Challenge of 'Industrial Revolution II,'" The New York Times Magazine, April 2, 1961, p. 36.

The Need to Investigate Training Activities

Periodic studies of company training practices are necessary to assist schools and businesses in the process of training clerical office workers. Some of the particular areas which can utilize these research findings are discussed below.

Business educators must have sufficient knowledge of changing office activities in order to adequately prepare their business students. This information is necessary, as

> a requisite for improvement of education and training in business is a complete knowledge of the practices of business firms relative to education and training. Study of a representative sample of the many education and training practices of business firms throughout the country is necessary to gain such knowledge . . . .[23]

Business educators need periodically to evaluate and improve their business curricula and instructional procedures. Examination of company practices can help determine whether or not education for business is accomplishing those outcomes that are desired by business. Planty, McCord, and Efferson, in Training Employees and Managers, write that "recommendations for improving the practice of teaching in American commerce and industry can be most valuable if they follow and grow out of an analysis of current training practices."[24]

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[23]Benjamin Franklin Thomas, "An Introductory Study of Education and Training Programs in Business" (unpublished Ed. D. dissertation, Indiana University, 1954), p. 315.

[24]Earl G. Planty, William S. McCord, and Carlos A. Efferson, Training Employees and Managers (New York: The Ronald Press Company, 1948), p. 127.

In his study, Educational Activities of Business, Serbein indicates that "ability to anticipate the future is important in curriculum building, and an interchange of information between business and education can help in making appropriate adjustments in curricula."[25]

Businesses and schools should co-ordinate their activities for effective utilization of joint talents and resources. A community study concerned with current training practices should reveal the extent businesses now duplicate instruction currently available in educational institutions. Better allocation of scarce educational resources will result in schools concentrating upon those programs for which businesses are less well equipped and which are better suited to the traditional purposes of education.

The economic and social pressures of our economy are forcing businesses to recognize the need for faster and more efficient methods of training. Companies that have experimented with new teaching methods and devices can contribute greatly by reporting the potentialities of the limitations of tried innovations.

A detailed study of company training procedures can be used as a guide by business educators and businessmen in solving their own problems. The practices of one company may differ from those of another. Yet many companies in numerous industries are known to use

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[25]Oscar N. Serbein, Educational Activities of Business (Washington, D. C.: American Council on Education, 1961), p. 3.

similar training practices.[26] Knowledge of what businesses are doing can assist those companies seeking to develop their own programs.

DePhillips, Berliner, and Cribbin in supporting this view point out that

> . . . if the copying company adapts another company's program to its specific needs, then it is at least taking advantage of established practice and also being creative relative to its own educational task.[27]

They further write that

> . . . an investigation along scientific lines can be of value in setting up a training program and that this can best be accomplished by studying current practices in a single company or in many.[28]

Current studies of training procedures for clerical office workers have been concerned mainly with only those programs which offer training to beginning clerical and stenographic office workers. As shown in Chapter II, Review of Related Research, there has been a lack of research concerning the extent of the training procedures for all levels of clerical workers and for all firms, not just large and well-known ones. Moreover, little is known about current training procedures, especially with regard to formal programs, of companies in the Greater Boston area.

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[26]William R. Spriegel and Virgil A. James, "Trends in Training and Development, 1930-1957," Personnel, Vol. 40 (January-February, 1959), p. 60.

[27]DePhillips, Berliner, and Cribbin, op. cit., p. 255.

[28]Ibid., p. 399.

Delimitations of the Study

Delimitation As to Geographical Area

This study was confined to those business firms located in the Greater Boston area, also known as the Boston Standard Metropolitan Statistical Area or the Boston SMSA.

Delimitation As to Personnel Studied

This study was concerned with the training and education practices for clerical office workers. The case study of formalized training practices was concerned with those clerical workers employed in nonsupervisory or clerical office positions.

Delimitation As to Business Firms

This study was concerned with the training practices of all firms, regardless of size, listed in: (1) the 1963 Dun and Bradstreet Million Dollar Directory,[29] (2) Greater Boston Chamber of Commerce data, and (3) the 1963-1964 membership roster of the Boston Chapter of the National Office Management Association.[30] Educational institutions and federal government agencies were excluded.

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[29] 1963 Dun and Bradstreet Million Dollar Directory (New York: Dun and Bradstreet, Inc., 1963).

[30] The National Office Management Association recently changed its name to the Administrative Management Society.

Definition of Terms

Those terms whose meanings are pertinent to an understanding of the study have been defined as follows:

Business education as used here refers to "that area of education which develops skills, attitudes, and understanding essential for the successful direction of business relationships . . . ."[31]

Clerical office worker, clerical worker, or clerical employee as used here refers to a worker engaged in the facilitating and coordinating functions of the office which include activities concerned with recording, coordinating, communicating, and reporting data for managerial decision.

Formal training or structured training as used here refers to planned instruction conducted in a classroom or conference situation. Such training may be highly organized, such as vestibule training, or may be less formally structured but in other aspects involve more than supervised on-the-job training.

Induction or orientation as used here refers to "a type of training designed to familiarize a new employee or trainee with company policies, plans, and procedures which directly or indirectly affect his job."[32]

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[31]Carter V. Good (ed.), Dictionary of Education (New York: McGraw-Hill Book Company, Inc., Second Edition, 1959), p. 71.

[32]A. E. Benn, The Management Dictionary (New York: Exposition Press, 1952), p. 238.

Informal training or on-the-job training as used here refers to that form of training which places the experienced or the inexperienced worker directly on the job and which prepares the worker for a specific job by a variety of ways ranging from trial and error to oral or written instructions.

Instructor or program instructor as used here refers to a person employed by the company to teach in a formal training program.

Trainee as used here refers to a worker who is "engaged under direct supervision in learning a job that may require up to several months of continuous employment, with or without related schooling in vocational subjects, before the worker may be considered fully qualified to perform the job."[33]

Training as used here refers to "that process which, under company auspices, seeks in a planned, co-ordinated and continuous manner to develop in all employees those understandings, skills, and attitudes, which will maximize individual present and future efficiency and the effectiveness of the over-all company operation."[34] The term as used in this study includes formal and informal training that a company conducts internally or sponsors outside of the company.

Vestibule training as used here refers to that form of formal "training conducted in an area removed from the shop, but in which there is provision for equipment and instructors to conduct the program."[35]

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[33]Good, op. cit., p. 268.

[34]DePhillips, Berliner, and Cribbin, op. cit., p. 6.

[35]Benn, op. cit., p. 336.

CHAPTER II

REVIEW OF RELATED LITERATURE

The increasing development of formalized company training procedures since the advent of World War II is reflected in the growing body of literature dealing with training in industry. This literature mainly consists of articles in professional journals, company reports, and unpublished theses and dissertations.[1]

Studies were found that investigated the general status of training for all company employees or for several classifications

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[1]An attempt was made to review literature concerning training needs and practices involving nonsupervisory or clerical office employees that has been written over the past fifty years and especially since 1940. Sources available at the following institutions were searched: Baker Library, Harvard University Graduate School of Business Administration; Boston University College of Business Administration Library; Boston University School of Education Library; and Kirstein Business Branch of the Boston Public Library.

The main sources used to locate related literature were: (1) indices and bibliographies of research studies, (2) indices to professional journals relating to the fields of business administration and business education, and (3) indices to publications of the American Management Association, National Industrial Conference Board, National Office Management Association, and Society for Personnel Administration. Identification of studies and reports through these sources led to a fourth source--the related literature section of theses and dissertations as well as references contained in other literature on training.

of employees in other geographical areas or in the nation as a whole. Other studies have been made which concentrated upon different phases of formalized training procedures for particular occupational groups. A few of these studies have investigated formal training programs for office employees; but, in general, these studies have been limited to studying one type of training program and to presenting their findings mainly in statistical summaries.

Examination of research studies and company reports concerned with training office employees in industry reveals in summary: (1) no extensive investigation of the types of training that firms which range in size from few employees to many employees within a specified geographical area provide for all levels of clerical office employees and (2) no intensive case study of formal training programs that firms provide for these employees.

Only those studies which pertain to some aspect of training clerical employees in industry are reviewed in this chapter. The related studies have been grouped as follows: (1) status studies of the training function in business, (2) studies identifying the need for clerical training, (3) studies of formalized training procedures for clerical workers, and (4) company reports of training experiences. Only a brief summary of the purpose, method of investigation, and selected conclusions of each study is attempted.

Status Studies of the Training Function in Business

A number of studies have investigated various aspects of the general status of the training function for a wide range of occupational categories in the nation's private industry. The following studies selected for review are significant to the present study in that they identify prevailing practices concerned with training office employees in their overview of the status of company training.

1948: Training Programs in Denver

Cutler[2] investigated the status of training in 100 firms located in Denver. A questionnaire was completed by an official from each company during a personal interview. A supplementary study was also made of 83 industrial training programs being carried on in other parts of the United States by using information obtained from journal articles and from company publications.

Among the conclusions of importance to this study are:

1. One or more in-service training programs are conducted in 92 per cent of the 100 firms, with the majority of firms including programs for new employees.

2. The training function is found within or closely associated to the personnel or industrial relations department.

3. Training seems to be carried on by individuals who have other responsibilities. Less than half (48 per cent) of the firms delegate training responsibilities to a training director; 18 per cent, to supervisors.

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[2]T. H. Cutler, "In-Service Training Programs within Industry in Denver" (unpublished Ph. D. dissertation, University of Colorado, 1948).

4. Objectives of training programs, in order of reported frequency, have been classified as follows: (a) to improve performance, (b) to prepare for promotion, (c) to break in new man, (d) to teach sales techniques, (e) to prevent accidents, and (f) individual objectives such as better labor relations, morale, make more money, specific problems, and personality development.

5. Training is not thought of as a separate distinct item but rather as a part of the total management or personnel budget. Only 17 of the 92 organizations claiming training were able to or willing to provide an approximate direct cost for their training programs over the latest fiscal year.

6. Prevalence of formal job training increases with the number of employees in a company. Firms employing 200 or more all reported in-service training programs; those employing fewer than 20 employees all reported no training programs.

7. The following trends were indicated from the study of 83 published programs: (a) statements of training goals although generally of an organizational nature are increasingly available; (b) classroom instruction involving assignments and recitation exceed on-the-job instruction with older approaches of lecture and vestibule training decreasing; (c) cooperation between business and education with regard to training is increasing; (d) titles of training courses offered reflect the diversity of industrial needs and the range of training requirements for different occupations; (e) a definite awareness and desire for evaluation or measurement of the effectiveness of training exists.

This study is helpful to the present study in giving an indication of those training practices being used by companies located within a limited geographical area.

1949: Training Practices of New York Manufacturing Firms

Brophy[3] conducted a survey of current practices of the organization, administration, and operation of plant-training programs in manufacturing firms in upstate New York. Direct observation, interviews, and questionnaires were the techniques used to study programs of 98 selected firms. The plants ranged in size from one to over 5,000 employees, with the majority employing 1,000 or more employees.

Among the conclusions reached by Brophy are:

1. An organized training program is conducted in eight out of every ten plants, with plants more likely to provide training for those employees nearest the point of fabrication and processing. Training programs for clerical and accounting workers are provided in only one firm out of four and mainly in those firms employing more than 2,000 employees.

2. Irrespective of size, plants are most concerned with on-the-job training and indentured apprenticeship training and are least concerned with pre-employment or vestibule courses and out-of-hours general courses. The largest plants are more concerned with training programs and offer greater variety than smaller plants.

1958: Educational Activities of Nation's Largest Corporations

Clark and Sloan[4] made a survey of the educational activities carried on by the nation's 500 largest (measured by dollar sales) industrial corporations. The study was based primarily upon questionnaires, personal conferences, and literature distributed by the

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[3]John M. Brophy, Training in New York State Industries (Ithaca, New York: New York State School of Industrial and Labor Relations, 1949).

[4]Harold F. Clark and Harold S. Sloan, Classrooms in the Factories (Rutherford, New Jersey: Institute of Research, Fairleigh Dickinson University, 1958).

corporations. Of the 482 questionnaires mailed, 349 replies or 72.4 per cent were completed.

Clark and Sloan found:

1. Of the total number of respondents, 84.4 per cent conduct some type of educational activity requiring participants to attend regularly. Most of these corporations carry on in-company and out-of-company programs.

2. The teaching staff of companies providing in-company activities are regular company personnel performing these duties on a full-time or part-time basis. About half of these companies supplement their teaching staff with college professors or others of comparable authority employed on a part-time basis.

3. Corporations that offer employees out-of-company educational opportunities generally defray expenses completely or partially. This policy usually is contingent upon grades received.

4. Corporations which provide educational activities usually conduct orientation and managerial-supervisory development programs. The other divisions of subject matter are provided in the following declining order of frequency: human relations, technical and professional, and general education.

5. Corporations offer classes to the following employee groups listed in order of declining training participation: foremen and supervisory, junior executives, business professional, senior executives, factory operatives, clerical staff, and families of corporation personnel. Less than a third of the corporations, 31.4 per cent, report educational programs available to the clerical staff.

6. No correlation between particular industries and interest in or lack of interest in educational programs appears evident.

The study also described a number of integrated educational programs in managerial development and technical instruction and outlined the subject matter and teaching methods of various courses in the five subject-matter divisions. However, none of these practices were examined in reference to clerical training.

1958: Status and Functions of Nation's Training Departments

The Professional Standards Committee of the American Society of Training Directors conducted a study of the status and functions of training departments in business, industry, and government. The study was reported in a series of eight articles by Belman and Bliek. Data were based on questionnaires received from 255 members of the American Society of Training Directors, which was 35.6 per cent of the original distribution of 715. Most of the respondents represented multi-unit organizations with 2,000 or more employees located in the Midwest and in the East.[5]

The objectives of the study were to identify the functions of the training department, to learn about its internal administrative structure, to determine specialization within the training occupation, and to assess the status of the training staff.[6]

The following conclusions were pertinent to the present study:

1. Most companies place the training function within the organizational area that is concerned with employment, development, selection, and welfare of people.[7]

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[5]Harry S. Belman and John E. Bliek, "The Head of the Training Function," Journal of the American Society of Training Directors, Vol. 13, No. 2 (February, 1959), p. 42.

[6]Harry S. Belman and John E. Bliek, "A Survey of the Status and Functions of Training Departments," ibid., Vol. 12, No. 8 (August, 1958), p. 35.

[7]Belman and Bliek, "The Head of the Training Function," ibid., Vol. 13, No. 2 (February, 1959), p. 53.

2. Training staffs are usually small regardless of the size of the organization. Organizations often rely upon their own personnel to perform the major part of the training activity and employ only a small number of professional trainers.[8]

3. Training is given most often for improving efficiency and morale and for employee development.

4. Review of course titles shows that no single type of training program is found in every organization. A standard class of training programs appears to be developing in order to meet continuing and recurring needs and desires: conference leadership, orientation, safety, JIT.

5. A marked difference exists between programs provided and programs demanded in organizations. Trainers and management prefer to provide programs in communications and human relations but indicate a growing demand for programs in job skills, technical, and cost and waste reduction.

6. Clerical programs are provided by nearly 17 per cent of the respondents and demanded by nearly 5 per cent of them. Of 23 possible types of company programs, clerical training ranks seventh in declining frequency of programs provided and seventeenth, of programs demanded.

7. Programs for rank and file employees may not be receiving the attention that is desired with major concentration being given to supervisory training and management development programs.[9]

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[8]Harry S. Belman and John E. Bliek, "The Internal Organization of the Training Function," ibid., Vol. 13, No. 9 (September, 1959), pp. 40-43.

[9]Harry S. Belman and John E. Bliek, "The Nature of Current Training Function Activities," ibid., Vol. 15, No. 2 (February, 1961), pp. 34-35.

1959: Employee Relations Personnel in Nation's Private Industry

Yoder and Nelson[10] were interested in determining patterns of duties and responsibilities of employee relations staff members and their essential characteristics and qualifications. Composite job descriptions were developed from mail questionnaires completed by 600 men and women who held employee relations positions in private industry throughout the nation.

Duties and responsibilities were grouped according to seven employee relations functions: (1) department administration, (2) employment and placement, (3) training, (4) collective bargaining (where a union exists), (5) wage and salary administration, (6) benefits and services, and (7) personnel research. These classifications have been useful to the present study in grouping the duties and responsibilities of those employees concerned with conducting training sessions for clerical office workers.

Yoder and Nelson found that only training specialists spent the majority of their time training employees: an average of 84 per cent of their time is spent on the training function and 16 per cent on department administration, research, and employment and placement. This part of the investigation provided the present study with knowledge of general patterns of education, experience, and job duties of those employees carrying out the training function. The usefulness of this information was limited to the extent that no

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[10]Dale Yoder and Roberta J. Nelson, Jobs in Employee Relations, Research Study No. 38 (New York: American Management Association, 1959).

correlation was made between these data and the particular subject areas or employee groups with which the responding training specialists were involved.

1960: Training Practices of Greater Louisville Manufacturing Industries

Stahl,[11] in a study that was very similar to Brophy's, studied the scope, organization, and principles of employee training programs in skilled, semi-skilled, and technical occupations of manufacturing industries. Of the 160 firms selected for study in the Greater Louisville area, 119 agreed to participate. Firms ranged in size from 50 employees to over 2,000 employees, with 60 per cent of the firms employing fewer than 250 employees and about 5 per cent employing more than 2,000 persons. The person in each company who had primary responsibility for the development and coordination of the training function was interviewed.

Stahl's conclusions that were significant to the present study are:

1. Industry usually provides in-plant training for skilled workers, semi-skilled workers, and supervisory personnel but seldom provides such training for executives, managers, or engineering personnel.

2. Typical in-plant training programs consist of job orientation, on-the-job training, and apprenticeship training.

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[11]Edgar Elias Stahl, "The Scope, Organization, and Principles of Vocational-Technical Training in Industry" (unpublished Ed. D. dissertation, Indiana University, 1959).

3. Training duties are the collateral responsibilities, frequently of minor significance, of the person in charge of achieving the training objectives.

4. Companies do not agree upon the identification of the groups responsible for operating in-plant training programs. Executive management, the personnel staff, and the supervisory personnel establish training policy.

5. Industry prefers brief training programs rather than lengthy skill development programs except in the area of apprenticeship training.

6. Industry relies heavily upon training facilities provided by outside agencies and encourages employees to participate in after-hours training.

These conclusions were limited to the extent that Stahl did not distinguish between formal training activities and supervised on-the-job training ones in reporting training practices being used by industry.

1961: Educational Opportunities of Louisiana Companies

A report of the educational opportunities offered employees by selected Louisiana firms was made by Sandoz.[12] The study was based upon mail questionnaires received from 83 firms ranging in size from 10 to 5,851 employees.

Among the conclusions reached by Sandoz are:

1. In-company training is offered by 75 of the 83 companies. The largest number of different courses are offered in the technical and professional area and next in the managerial and supervisory area.

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[12]Dolores Mary Sandoz, "Educational Activities Offered Employees by Some Selected Louisiana Companies" (unpublished Ph. D. dissertation, Louisiana State University and Agricultural and Mechanical College, 1961).

2. In-company training is conducted by full-time employees who in most cases also perform other company duties.

3. All classes of employees participate in in-company training. Foremen, skilled workers, technical workers, and clerical workers participate more frequently than other employee groups.

4. Fifty-nine companies give part- or full-tuition reimbursement to employees who take courses to increase job knowledge or to acquire additional skills and learning. Over 40 per cent of these companies also allow employees to take courses which are not relevant to their present or future positions.

These conclusions were limited to the extent that Sandox did not identify the type of in-company training in which clerical workers were participating and did not indicate whether all or particular employee categories were eligible for company tuition aid.

1961: Training and Educational Activities of Nation's Business Firms

Another study was reported in this year by Serbein.[13] He conducted a nationwide research study under a grant from the Fund for the Advancement of Education to determine the extent, pattern, and content of training and educational activities of business organizations. Data were obtained from 1,605 firms ranging in size from 100 to 10,000 employees by mail questionnaires and by interviews. Of the firms that replied, 756 engaged in some kind of in-company education. Firms employing 10,000 or more employees almost universally reported some type of educational program.

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[13]Serbein, op. cit.

Conclusions which were of interest to this study are:

1. The majority of in-company programs are concerned with supervisory or executive training and professional or technical training.

2. The most important purpose for giving courses is to increase employees' knowledge and skill for greater productivity. Next in importance is preparing the employee for promotion.

3. The criterion most often used to select employees for in-company education is job classification. Next in frequency is recommendation by top management.

4. The program leader or instructor is most often a company employee with regular operational or staff duties.

5. Company courses are given on both company and employee time. In general, companies pay all program expenses.

6. Large firms make the greatest use of out-of-company education and training.

Serbein's findings about the future training plans of the participating companies enabled him further to conclude:

> . . . business, particularly large business, plans to maintain and strengthen present in-company educational programs, with the result that business will probably more and more assume a large part of the burden of providing specialized training for its employees. This conclusion is further strengthened by the fact that business plans practically no expansion in out-of-company programs.[14]

Although the study covered the entire range of business personnel and presented an overview of all phases of educational activity sponsored by business, the study discussed in detail only certain training programs in management and professional-technical areas and did not include programs for clerical employees.

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[14] Ibid., p. 107.

1962: Formal Training Programs in the Nation's Industry

A nationwide survey to determine the extent and type of formal training in industry was conducted by the United States Bureau of Apprenticeship and Training.[15] The study was undertaken to assist the Department of Labor in appraising the adequacy of the country's manpower development efforts as required by the Manpower Development and Training Act of 1962 and to provide an appraisal of private industry's training activities prior to the impact of this Act.

After pilot surveys were completed in Mercer County, New Jersey, and in the State of New Jersey, questionnaires were sent to 9,600 of the nation's firms. This survey represented a 1 per cent stratified systematic sample of organizations by size class within each major industry that reported to each of the 50 State Employment Security Agencies for unemployment insurance compensation. More than 85 per cent of the questionnaires were returned. Companies ranged in size from 4 employees to over 5,000 employees.

Findings were given in terms of 711,054 firms which employed 37 million workers--half of the nation's labor force. Of these workers, 2.7 million were enrolled in employer-sponsored training programs.

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[15]U. S., Bureau of Apprenticeship and Training, Training of Workers in American Industry, Research Report No. 1 (Washington, D. C.: U. S. Department of Labor, Manpower Administration, Bureau of Apprenticeship and Training, 1962).

Conclusions which seemed relevant to the present study are:

1. Formal training within industry is provided by fewer than one in five companies which indicates that private industry has adopted no formalized training for its workers and relies on some formal training system or obtains workers from other sources.

2. The larger the number of employees in a company the greater is the probability that a training program is in operation.

3. Service industries show somewhat higher proportions of workers in training than goods-producing industries. Although manufacturing industries report the largest number of training programs, finance, insurance, and real estate industry and retail trade industry report the highest proportions of companies with training programs.

4. Most trainees are enrolled in short courses in which development of new skills or improvement of existing ones is only incidental.

5. Of nearly 3.6 million trainees, 48,000 or 1.3 per cent are trainees in office skills training. Of the 1.5 million trainees with identifiable occupations, 54,900 are office and clerical workers.

6. The most prevalent types of training programs are: skilled trades with 58,100 programs; managerial or supervisory, 29,000; sales, 24,700; business and industry processes, 22,700; orientation, 20,100; safety, 18,200; engineering and technical training, 18,000; and office and clerical, 11,000.

7. Among major occupational groups the number of programs that are being offered to office and clerical workers ranks fifth, with 13,800 programs.

8. Employer-subsidized training in educational institutions is heavily concentrated among large companies.

1963: Training Background of Nation's Workers

The United States Bureau of the Census[16] made a nationwide survey to learn the job training background of adult workers, ages 22 to 64. Information was sought from members of the labor force who had completed less than three years of college. Workers were asked whether they had received formal training, what kinds of training they had had, how their training was related to their education, whether the training had been used on their current or previous jobs, and how they had learned their current jobs.

The findings indicated that most job training was obtained at the start of an adult's working life. Nearly half of the women started their last job training before they were 18, which reflected the importance of high school business education for girls.

The clerical occupational group was the only group besides the professional and technical group in which the majority of workers reported that they had learned their current jobs through formal instruction. High school vocational and commercial courses represented the largest source of training previously taken by these workers.

About 3 per cent (1.4 million) of these adults were enrolled in formal training programs at the time of the study. The sources of training programs that were currently being taken by women were: special school, 39.5%; junior college, 19.7%; high school, 17.8%;

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[16] Manpower Report of the President, (1964), op. cit., pp. 66-71.

correspondence school, 10.5%; company school, 8.6%; armed forces, 2.5%; apprenticeship, .6%; technical institute, .6%. The study did not attempt to investigate the purpose for which training was being taken.

Studies Identifying the Need for Clerical Training

Data have been obtained from employers and/or employees to determine areas in which employees need more clerical training. These investigations often have been limited to companies located in a particular community and frequently are concerned only with the high school preparation needed by new employees. Examples of such studies are described below.

The following studies are especially relevant to the present study in that (1) they identify areas in which office employees are deficient or need additional training and (2) they indicate a need for formalized company training. Subjects which were reported most frequently as needing attention were typewriting, shorthand, office machines, business letter writing, English usage, and telephone techniques. Changes occurring in office operations and procedures which might have implications for clerical training were not investigated in these studies.

1914 - 1941: Community Surveys

A number of community surveys have been made to determine training needs of office employees. Typical community surveys conducted between 1914 and 1941 have been briefly summarized by Monograph 58.[17] Of these eleven studies, nine were conducted by school authorities and two by chambers of commerce. Employers, company employees, and/or business graduates of particular high schools were contacted personally or by mail questionnaire. In general, these studies attempted to determine what subjects business graduates found most valuable to their work and/or to determine in what areas employers found their workers deficient or in need of more training. Subjects most frequently mentioned throughout this period were penmanship, arithmetic, English, spelling, and typewriting.

Of these investigations, one of the earliest was conducted by the Boston Chamber of Commerce in 1914. This study is described here because it concerns the geographical area of the present study.

The Boston Chamber of Commerce conducted this investigation by compiling vocational histories of 1,165 office employees through written testimonies and personal conferences. Employees named the following six subjects, in declining order of frequency, that they believed had been of vocational use to them: penmanship, arithmetic, bookkeeping, typewriting, shorthand, and other subjects.

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[17]R. G. Walters, The Community Survey, Monograph 58 (Cincinnati: South-Western Publishing Company, 1942).

1941: Occupational Adjustments of Office Workers

Finkelhor[18] studied the occupational adjustments of beginning office workers in Pittsburgh. The study was concerned with occupational adjustments met by these workers in seeking employment and in doing office work and with relationship adjustments in associating with other employees. Data were obtained by interviewing 115 employers and by interviewing and examining anecdotal records of behaviors of 130 beginning office workers who had studied at the Business Training College in Pittsburgh.

Finkelhor found no uniform procedure for helping office employees learn their job duties. The majority of participants indicated that office employees learned their duties from fellow employees. Forty-five per cent of the employees interviewed admitted that there was no definite procedure for learning the details of the job. Finkelhor concluded that lack of knowledge concerning office policies and procedures and inadequate preparation caused occupational adjustment difficulties for these workers.

1955: Problems Experienced by Beginning Office Workers

Liguori[19] interviewed 22 employers and 120 beginning women office workers in the Cincinnati and Pittsburgh areas to determine problems experienced by beginning office workers in obtaining and

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[18]Dorothy C. Finkelhor, Occupational Adjustment of Beginning Workers (Stillwater, Oklahoma: Oklahoma Agricultural and Mechanical College, 1943).

[19]Frank E. Liguori, "Problems of Beginning Office Workers" (unpublished Ph. D. dissertation, University of Pittsburgh, 1955).

holding jobs. Beginning office workers were defined as high school graduates with no more than four months of work experience.

Among the findings pertinent to the present study are:

1. Beginning workers receive job orientation from fellow employees and from supervisors and express a need for additional help.

2. Beginning employees indicate that they have difficulties with shorthand, typewriting, spelling, English, office machines, arithmetic, telephone duties, and filing.

3. Employers indicate that high school graduates lack sufficient training in shorthand, letter composition, grammar, office machines, bookkeeping, typewriting, and arithmetic.

4. Both beginning employees and employers indicate that beginning employees possess personal qualities which cause difficulties.

Liguori concluded that beginning workers are encountering considerable difficulties in performing clerical skills.

1955: Employment of Beginning Office Workers in Oklahoma City

Reed[20] conducted a study to determine circumstances surrounding employment of beginning office workers in Oklahoma City. Questionnaires were handed to 323 office managers of selected business firms. Usable data were obtained from 233 of these firms. Office managers were asked about job opportunities available to beginning office workers, basic education requirements, means employees are selected, standards that beginning employees must meet, duties of beginning workers, traits and abilities to which beginning office workers are deficient, and types of machines and equipment utilized.

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[20]James Ralph Reed, "Circumstances Surrounding the Employment of Beginning Office Workers in Oklahoma City" (unpublished Ed. D. dissertation, The University of Oklahoma, 1955).

Among the conclusions which were of interest to this study were:

1. Beginning employees in office service occupations encounter difficulty in initiating, organizing, and executing efficiently the office tasks assigned to them. Far fewer are deficient in basic abilities such as spelling, penmanship, English usage, speech, and reading.

2. Beginning typists and beginning stenographers are frequently deficient in their ability to perform efficiently the tasks which are basic to their occupational classifications.

3. Beginning office employees in all occupational classifications are most frequently deficient in accuracy.

4. Greater difficulty is experienced in securing workers for higher level office service positions than for positions at the lower level. Occupational classifications most difficult to fill are private secretary and secretary-stenographer.

It was beyond the scope of this study to designate how office managers overcame deficiencies found in their beginning office workers and overcame shortages of particular classifications of office workers. The study did indicate that employers are willing to co-operate with schools in providing students with on-the-job training so that they may gain practical experience prior to full-time employment. The study also pointed out that persons seeking employment in higher level office service positions must possess extensive education, ability, and experience.

1945 - 1961: Community Surveys

A number of master theses have been concerned with determining training needs of office employees in a particular community. Among such master theses completed between 1945 and 1961 were the following:

Eastwood[21] investigated the status of stenographers employed in the Syracuse area in regard to personal qualifications, duties performed, machines used, training deficiencies, and standards required by business. Del Tedesco[22] investigated 40 employers in Columbus concerning the adequacy of the preparation of high school business course graduates. McCready[23] was concerned with determining the need for and the content of an in-service training course in stenographic procedures for employees of a large Boston insurance company. Betti[24] conducted a survey of 128 business firms in the Greater Boston area (1) to determine deficiencies of new office employees with regard to job preparation, personality traits, and work habits and (2) to obtain suggestions from businessmen for improving business education programs in schools. Eaves[25] sought to determine the business training needs of office employees employed by 30 firms located

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[21]Betty A. Eastwood, "An Analysis of the Qualifications and Duties of Stenographer, Class B, as Determined by Judgments of Personnel Managers and Beginning Stenographers" (unpublished Master's thesis, Syracuse University, 1948).

[22]Mary Macino Del Tedesco, "Reactions to the Employability of High School Business Course Graduates" (unpublished Master's thesis, The Ohio State University, 1949).

[23]Marjorie E. McCready, "A Study to Determine the Need for and the Content of In-Service Training Courses in Stenographic Procedures for the New England Mutual Life Insurance Company, Boston, Massachusetts" (unpublished Master's thesis, Boston University, 1949).

[24]Ida-Marie Betti, "A Survey of 128 Greater Boston Business Firms to Determine Some of the Deficiencies of New Office Employees" (unpublished Master's thesis, Boston University, 1954).

[25]John B. Eaves, "In-Service Business Training Needs of Office Employees of the Portsmouth Area of Virginia" (unpublished Master's thesis, Virginia Polytechnic Institute, 1956).

in the area of Portsmouth, Virginia. Jensen[26] investigated the causes for dismissing clerical workers during a three-year period, from 1953 through 1956, in ten San Francisco Bay area firms which employ a large number of clerical personnel. Greer[27] conducted a study to determine training needs of office employees employed by firms in Waynesboro, Virginia.

In these studies, employers or both employers and office employees were contacted personally or by mail questionnaire. The investigators, for the most part, attempted to determine in what areas workers were deficient or needed more training. Subjects most frequently mentioned by these investigators included basic skills, such as typewriting, shorthand dictation and transcription, office machines, English skills, and telephone usage.

Studies of Formalized Training Procedures for Clerical Workers

The studies in this group represent major studies that have concentrated upon investigating company training practices for clerical office employees. They are also significant to the present study in providing an overview of formal training procedures and programs.

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[26]Warren Martin Jensen, "A Study of the Causes for Dismissal of Clerical Workers from Selected Businesses in the San Francisco Bay Area" (unpublished Master's thesis, San Francisco State College, 1956).

[27]Aileen K. Greer, "A Comparative Study, As Viewed by the Employer and the Employee, of the In-Service Business Training Needs of Office Workers in Waynesboro, Virginia" (unpublished Master's thesis, Virginia Polytechnic Institute, 1961).

1944: Work Analysis of General Clerical Employees

One of the earliest studies concerned with investigating such formal training procedures was conducted by Potter[28] in 1944. She studied the duties of the typical general clerical employee and the characteristics of typical in-service training programs for these workers. This study is no longer in print and no copy of the study could be located. Information about this study was obtained from a secondary source.

Among the findings of interest to this study were the following:

1. In-service training programs are usually concerned with the skills and techniques required for the job as well as with human relations and with supervision.

2. The typical in-service training program is organized to increase the efficiency of the inexperienced worker and to prepare the experienced worker for advancement. No particular effort is made to select employees on the basis of ability or aptitude.

3. Employees attend classes voluntarily after working hours.

1945: Status of Business Education Training in Nation's Largest Corporations

Anderson[29] found that 23 corporations most frequently provide office employees with on-the-job training and, through special arrangements with outside agencies, after-work training. Training is primarily concerned with teaching technical information, orienting

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[28]Thelma Maude Potter, An Analysis of the Work of General Clerical Employees (New York: Bureau of Publications, Teachers College, Columbia University, 1944). As summarized in Harrison, op. cit., p. 27.

[29]Margaret Vance Anderson, "The Status of Training in Business Education Provided by Corporations of the United States" (unpublished Master's thesis, University of Tennessee, 1945).

to the company, and preparing for job advancement. Training programs most frequently include orientation and training in business practices and skills; less frequently, shorthand skill improvement courses; and still less often, typewriting courses. Courses in economics, public speaking, and secretarial practices are offered on a voluntary basis. Employees in these companies usually are encouraged to take additional training at educational institutions at company expense.

1952: Training Practices of Denver Companies

Lewis[30] investigated training practices in 16 companies in Denver by interview and in 18 companies throughout the United States by letter. Lewis found that informal or on-the-job training by a supervisor or a fellow employee is the most common kind of office training. Specialized training programs have been developed to minimize a shortage of skilled workers and a high turnover caused by an increased demand for workers by the government and by new businesses. Lewis concluded that businessmen's complaints about excessive turnover, poor attitudes, and shortage of skilled workers indicate that the present informal on-the-job training methods are not accomplishing the results that could be achieved through a planned training program.

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[30]Clare Elliot Lewis, "An Analysis of the Training Programs for Office Employees in Selected Business Organizations" (unpublished Master's thesis, University of Colorado, 1952).

1953: Personnel Policies and Practices in Small Chicago Offices

Speck[31] studied current personnel policies and practices in offices with 5 to 100 employees. Personnel policies and practices were classified into five areas: employment procedures, employee induction and training, compensation and benefits, miscellaneous personnel activities, and managerial activities. Mail questionnaires and interviews were used to obtain information from 359 companies located in the Chicago area.

Speck's conclusions concerning employee training policies and practices are:

1. In general, management does not have a well-planned indoctrination program for new employees.

2. Development of training programs for general office workers, establishment of employee educational aid plans, and employment of student trainees indicate management is giving thought to the problem of training office workers.

3. Rank and file office workers are trained most frequently by supervisors and experienced workers and by the understudy method.

4. The larger the office the greater is the tendency to establish a planned indoctrination procedure for new employees, to establish and maintain formal training programs, to pay all or part of the employees' school fees, and to employ cooperative student trainees.

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[31]Eldred C. Speck, "Personnel Policies and Practices in Offices with 5 to 100 Employees" (unpublished Ph. D. dissertation, Northwestern University, 1953).

1954: Formal Training Programs of Two Minnesota Firms

Thomas[32] studied the formal education and training programs of two Minnesota firms with reference to their philosophy and objectives, organization, and certain operational procedures. Both firms are well-established, successful companies with extensive education and training programs for employees.

Data were obtained from current literature and from interviews with company personnel of the participating companies. Tentative principles for education and training in business were developed. These principles then were compared with the practices being employed in the programs of these two firms.

Thomas concluded:

1. The educational and training objectives of both companies are to improve the employees' performance and, in turn, the company's operation. The main emphasis is placed on job training for current jobs and for lateral transfer, upgrading, or promotion. Moderate emphasis is given to business, economics, and general education.

2. Course content is determined by line and training staff personnel through job analyses and employee evaluations.

3. Teaching methods and devices vary with the type of training given. Performance or practice, demonstration, and individual instruction are the most common methods used to train for specific skills.

4. Instructors are company personnel and are given some training to increase their teaching effectiveness.

5. Trainees are evaluated informally by observation and achievement and occasionally formally by examination. The training director, line personnel, and trainees informally evaluate training programs on the basis of subjective observation of job performance.

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[32]Thomas, op. cit.

The study contributed to the present investigation by identifying those elements of a training program that were thought to be necessary for inclusion in an intensive study of training programs.

1955: Formal Training Programs for General Clerical Workers in New York City

Wuthenow[33] studied the aims, methods, materials, and content of formal training programs for general clerical workers. Findings were based on check sheets and interviews with the personnel manager or training director of each of 36 firms with programs in New York City.

Among the conclusions which were significant to this study are:

1. The main purpose for establishing training programs is to provide employees with those skills and knowledges necessary for performing their duties. Programs are given to correct skill deficiencies, to adapt these skills to those clerical procedures peculiar to the firm, and to orient employees to the company.

2. Company training is given to new clerical employees in typewriting, filing, and adding-calculating machine operation because employees lack or possess inadequate skills in these areas for on-the-job efficiency.

3. Although no one method of teaching is preferred, the most popular teaching pattern is a combination of lecture and demonstration.

4. Companies do not have specific methods for evaluating the success of their training programs. Most firms depend upon verbal or written routine reports provided by the employee's supervisor which do not specifically evaluate the training received.

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[33]Edith V. Wuthenow, "In-Service Training Programs for Clerical Workers" (unpublished Ed. D. dissertation, New York University, 1955).

5. The teaching approach, materials, and methods used in these programs do not differ to any great extent from those used in the high school clerical practice programs. Environment and motivational factors rather than course content or teaching methods employed seem to determine the degree of success achieved through programs in transforming high school graduates into efficient employees.

Wuthenow recommended that schools should strive to improve clerical programs in order to eliminate those weaknesses found in new general clerical employees by businessmen. Companies probably could eliminate one-third of their training programs if high school graduates were well prepared in basic clerical skills.

This study contributed to the present study by indicating through statistical summaries some of the formal training practices followed by companies that are also located within a large metropolitan area. The interview form contructed by Wuthenow for use in learning about a particular training program was consulted by the investigator in developing the interview guide for the present study.

1955: Administration and Operation of Centralized Office Services in 16 Firms

Coonrad[34] investigated the administration and operation of centralized office services in business organizations located in midwestern and southwestern regions of the United States. The office services included stenographic and typewriting, filing, mechanical communications, mail and messenger, duplicating, and office supplies.

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[34]Harold Adrain Coonrad, "The Administration and Operation of Common Office Services" (unpublished Ed. D. dissertation, Indiana University, 1955).

An interview-observation technique was used to obtain data from 16 firms which represented various types of businesses and which ranged in size from 130 office employees to 2,000 office employees.

Coonrad's conclusions relating to training practices are:

1. A formal induction orientation program generally is not employed.

2. Beginning workers learn their duties and responsibilities from supervisors and from fellow workers while performing job activities.

3. In some cases procedural manuals are provided as aids to on-the-job instruction for stenographers, typists, and file clerks.

1956: Current Office Practices

Mandell,[35] under the auspices of the American Management Association, made a survey of current recruiting and selection practices of office employees. Questionnaires were sent to office managers and personnel directors in 1,000 firms. Replies were received from 320 organizations ranging in size from under 50 office employees to over 1,000 office employees.

Conclusions pertinent to the present study are:

1. The respondents indicate that the greatest single weakness among applicants for office jobs is faulty attitudes, specifically, inadequate motivation and unwillingness to accept responsibility. The second greatest weakness is inadequate preparation, which includes deficiencies in spelling, grammar, and mathematics.

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[35]Mandell, op. cit.

2. Training programs are found more frequently in companies employing more than 500 office employees than in companies with fewer than 200 office employees.

3. Turnover rates in excess of 10 per cent are found in 84 per cent of the companies with training programs as compared with 55 per cent of the companies without programs.

4. The lack of qualified office employees has caused 24 per cent of the responding companies to maintain formal training programs to train inexperienced employees in the necessary skills.

1958: Federal Civilian Training Practices

A report of current federal civilian training practices was provided by the United States Civil Service Commission.[36] Information was compiled from reports received from departments, bureaus, and independent agencies of the federal government. Although this report is concerned with the activities of the federal government and not industry, this report has been reviewed here because the training practices seemed to be in agreement with many of those found in industry.

Conclusions that seemed relevant to the present study are:

1. Many of the agencies of the federal government have issued formal statements to guide employee training activities.

2. In most cases the supervisor is given the responsibility for training employees. Some agencies provide specialized training staffs or centralized schools to assist supervisors in meeting their responsibilities.

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[36]U. S., Civil Service Commission, The Training of Federal Employees, Personnel Methods Series No. 7 (January, 1958).

3. The most effective type of training is on-the-job training given by supervisors in the course of daily operations. Formal courses effectively supplement this training when they are consistent with daily practices.

4. Nearly every agency gives its employees a planned orientation to the organization, personnel system, and work he is to do.

5. Some formal training is given to clerical workers in correspondence, office procedures, shorthand and typewriting refresher courses, office machines, filing, recordkeeping, and reporting.

6. Formal training is given to clerical workers to prepare them for advancement in those situations with high turnover rates. Training assures the availability of qualified personnel to fill vacancies and lessens the possibility of serious interruptions of work operations.

7. Evaluation of training is mainly subjective because the administration of scientific evaluation methods is impractical for applying to in-service training. Most agencies receive written evaluations from trainees and from their supervisors concerning the value and the effectiveness of particular training.

The report further concluded that informal on-the-job training is used most frequently to meet the needs of clerical workers. The report recommended that agencies reassess both the training needs of their employees and the adequacy of current programs for meeting these needs in order to present more formalized training to increase their employees' motivation and efficiency.

1958: Training Programs for Beginning Stenographers

Harrison[37] studied the objectives, methods and materials, courses and content, and standards used in in-service training

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[37]Alice Marjorie Harrison, "An Analysis of Formal In-Service Training Programs for Beginning Stenographers" (unpublished Ph. D. dissertation, The Ohio State University, 1958).

programs for beginning stenographers. The analysis was based upon questionnaires received from 37 office, training, and/or personnel managers, from 307 trainees in the training programs or employees of these companies, and from 36 training instructors.

Among the conclusions that were reached by Harrison are:

1. Businessmen are concerned about improving the efficiency of stenographers as indicated by the maintenance of formal in-service training programs and the partial or full payment of school fees for enrolling in courses related to present or prospective jobs.

2. In-service training programs for beginning stenographers are found more frequently in companies employing 100 or more office employees, including 18 or more stenographers.

3. The majority of these programs are given to provide remedial training for inadequately trained stenographers.

4. Other than orientation, typewriting, and shorthand and transcription are most often included in the training program.

5. Most of the trainees have had a year or more of high school typewriting, shorthand, and transcription; few trainees have had business training beyond the high school level.

6. Trainees are selected on the basis of graduation from a high school business program, tests, and/or a company policy requiring all new stenographic employees to participate in the program.

7. Most of the companies periodically evaluate their training programs to determine whether the skills acquired are adequate or inadequate, whether they are used on the job, and whether there is carry over from the training to the job.

8. Trainees are evaluated by class instructors. Attitudes, initiative, problems, and tests are important in evaluation.

9. After completion of training, many of the companies conduct follow-ups of their trainees to determine whether training has been adequate for the particular job.

10. Rewards are given to trainees in the form of promotion, certificates or diplomas, and recognition in company house organs.

Although Harrison's study was concerned with only company programs offered to beginning stenographers, she investigated more of the various elements of clerical training programs than any of the other reported studies. Her study was especially helpful to the present study in its identification of areas which might be included in a case study of formal training programs.

1961: How Companies Train Clerical Workers

The Dartnell Office Administration Service[38] made a study to determine how companies train clerical workers for maximum productivity. Of the estimated 1,000 questionnaires mailed to Dartnell subscribers to the Service, about 10 per cent replied.

> The survey covered companies of all sizes in the United States. The majority that answered were located in California, Colorado, Florida, Illinois, Minnesota, New York, and Ohio.
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> The kinds of businesses that replied included those that have fairly large clerical staffs: savings institutions, insurance companies, manufacturers (oil, rubber, etc.), services such as Brink's--payroll service, hospitals, and state government offices.[39]

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[38] How 101 Companies Train Clerical Workers (Chicago: Dartnell Corporation, 1961).

[39] Quoted from a letter to the investigator from Marilyn French, Editor, Management Publications, The Dartnell Corporation, July 30, 1964. The letter also states that the study was made in 1961 and published in May of that year.

Major conclusions of the study are:

1. Eighty per cent of the offices do not have any planned, established, and standard procedure for training clerical employees.

2. Over 50 per cent of the companies that do have clerical training programs begin training when the employee is hired; the other companies train periodically, prior to advancement or when training is needed.

3. In over 85 per cent of the replying companies, the immediate supervisor or the department head is responsible for training the clerical staff under his direction.

4. Fifty-four per cent of the companies indicate that tests, merit-rating techniques, or other personal evaluation instruments are used as part of the training program.

5. Organized training programs usually were developed as a result of company growth or a shortage of qualified personnel.

6. The majority of the 101 companies do not send clerical employees outside the company for training, but about 30 per cent of the companies have used outside consultants for training.

Company Reports of Training Experiences

A few companies have reported their company training experiences for clerical office employees in publications relating to fields such as business, business education, and office management. Such reports usually present a general description of the training experience and do not attempt to discuss all aspects of the training activity.

Some of the most recent reports are summarized below in order to indicate various forms of clerical office training activities with which businesses in other parts of the country are involved. These training activities range from cooperative programs on the

pre-employment level to programs developed for advancement and efficiency purposes on the employment level.

The Lederle Laboratories Division of the American Cyanamid Company[40] offers a cooperative office study program to the seven high schools in Rockland County, New York, in order to correlate school studies with future careers. The company holds four two-week training sessions each year. Each session covers practice in typewriting and in shorthand dictation as well as demonstrations of office tabulating equipment.

The E. I. DuPont de Nemours and Company[41] in cooperation with the Goldey Beacom School of Business in Wilmington, Delaware, instituted the Academic Stenographic Training Program for high school and college graduates to relieve the critical shortage of office workers. Each trainee works a half day and attends school a half day for 38 weeks. In return DuPont pays each girl $46. Successful completion of the program leads to a permanent position with DuPont. After two years of employment with the company, DuPont reimburses the trainee for her tuition.

The Procter and Gamble Company[42] offers a Saturday Training Program to meet problems of recruiting, selecting, and training.

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[40]Orvis R. Hazard, "This Manufacturer Trains Business Students," Business Education World, Vol. 38 (June, 1958), pp. 11-13.

[41]Sid R. Peters and J. William Harrison, Jr., "The DuPont-Goldey Beacom Earn-While-You-Learn-Program in Wilmington, Delaware," EBTA Journal, Vol. 1, No. 2 (Spring Issue, 1963), pp. 50-54.

[42]Jean Crontz, "Training Solves Problems," The Journal of Business Education, Vol. XXXV (March, 1960), pp. 258-259.

The program is designed to produce well-qualified applicants for stenographic and typewriting positions and to enable these trainees to do productive work as soon as they become full-time employees. From several hundred applicants, the company selects the 35 most qualified applicants to participate in the program. Trainees are taught the company's correspondence procedures and standards of work and at times are paid by the company. If a trainee's work is satisfactory, the company offers her full-time employment.

The company gives a similar training program to stenographers and typists who begin employment without the Saturday Training experience. A series of nine discussion-type advanced training meetings also are held several times a year for all new clerical employees. In addition, stenographers may take speed building and refresher shorthand courses during office hours for better job performance or for job advancement.

The Public Service Electric and Gas Company of Newark, New Jersey,[43] instituted a conference program for secretaries to encourage the interchange of ideas. A group of 15 secretaries meets with a trained conference leader for eight two-hour direct-discussion sessions during working hours. The secretaries are selected from various departments on the basis of need and experience that they can contribute to the meetings. The program includes the following topics: duties and responsibilities, the boss, how to get along with

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[43]Arthur D. Stearns, Jr., "Conference Program for Secretaries," Journal of the American Society of Training Directors, Vol. 13, No. 5 (May, 1959), pp. 32-35.

people, telephone courtesy, taking care of visitors, planning work, effective use of time, dictation, transcription, letter writing, typewriting, and filing.

The Field Service and Support Division of Hughes Aircraft Company[44] decided to offset the shortage of competent stenographers by training present employees for promotion to these positions. After a study of the training function--its value to the company and to the employees, its effectiveness, its cost, and the length of time necessary to achieve particular training objectives--the company found that a course in Stenoscript ABC shorthand would meet its needs.

The course is given three hours a week for 11 weeks. Upon completion of the course, 95 per cent of the trainees are able to qualify for the Hughes stenographic rating of accurately transcribed dictation at 80 words per minute. A follow-up survey of past graduates of the course revealed that 92 per cent of them have used their skill to obtain promotions or better job ratings. A six-hour refresher course is being planned to help students maintain and surpass their original speeds.

The home office of Combined Insurance Company[45] in Chicago developed an eight-week course for secretaries to top executives and

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[44]Patricia L. Perkins, "Meeting the Demand for Stenographers," The Journal of Business Education, Vol. XXXVIII (March, 1963), pp. 237-238.

[45]Phil Hirsch, "A Secretarial Training Program for the Smaller Office," The Office, Vol. 46 (July, 1958), pp. 76-83.

a six-week course for secretaries to lower-echelon executives and stenographic-pool transcribers. Each course consisted of a weekly two-hour session conducted by the training director. The purpose of the program was an attempt to update top-level secretaries in letter writing techniques, to improve the English fundamentals of all levels of secretaries and stenographic pool transcribers in certain aspects of secretarial work for promotion for secretarial vacancies within the organization, and to find ways to overcome interpersonal difficulties that occasionally occur between executives and their secretaries.

Whippany Laboratory of Bell Telephone Laboratories Incorporated[46] has developed a comprehensive training program for secretaries and for the executives they serve. In brief, the new employee is assigned to the stenographic department to receive on-the-job training in performing stenographic duties for nonmanagement personnel. She attends a one-hour class session of speed dictation given four times a week on company time until she can pass a 100-word-per-minute test on technical dictation. The training program also includes intensive study of the company's reference manual for secretaries and tours to the various services located throughout the company that a secretary would use. Special lectures are given on such subjects as travel, security, telephone manners, and company policy. Before training is completed, the new employee spends a week

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[46]Harriet B. Filmer, "Training Program for Secretaries and the Executives They Serve," The Journal of Business Education, Vol. XXXVIII (May, 1963), pp. 323-325.

at a "training desk" to determine whether she is ready for her first secretarial assignment or needs more training in the stenographic department. In this capacity the stenographer is rated on her performance as a secretary to the two supervisors in charge of secretarial service. In addition, an informal training session is given to executives on "How to Use a Secretary" to assist them in optimizing the use of their secretaries on nontechnical and administrative matters.

A major advance in the training process has been developed by the Bell System.[47] Automatic training equipment has been devised for operators of the 100A Traffice Service Positions.

> Voices of customers and distant operators are simulated as they would occur on actual calls and recorded on magnetic tape that is played back to the trainee in conjunction with . . . signals controlled by paper tape.[48]

The training equipment also recognizes and informs the student when she makes an operating error. Only on special occasions will an instructor be needed, such as to present new material or more effective or efficient practices than the stored program. In these cases, the instructor will assist the student while the equipment operates automatically, providing economy of time and an opportunity for greater consideration on the part of the student. The automated teacher is patient, tireless, immune to distraction, and, through careful programming, a subject-matter expert in the field.

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[47]R. D. Kroning and D. H. Gale, "Automatic Training for Operators of the 100A TSP," The Bell Laboratories Record, Volume 41 (September, 1963), p. 317.

[48]Ibid.

Summary

Although a variety of conclusions have been presented on the basis of the studies cited, many of them are complementary. The agreement of these conclusions tends to show the existence of similar training practices in industry. This is an indication that only a small proportion of industry is cognizant enough of the need to provide clerical employees with formalized training. Although clerical employees most often learn their duties from either a fellow worker or a supervisor or both, the more clerical employees in an office the greater is the tendency for companies to establish training programs. Programs most often seem to be developed in order to strengthen basic skills, to prepare for advancement, to give technical information, and to provide company orientation. Many of the same training needs are being mentioned throughout these studies, over a period of 47 years. Training seems to be needed most often in typewriting and in shorthand; the next greatest need for training is in office machines, business letter writing, English usage, and telephone techniques.

The findings of many of the studies reviewed tend to be limited by the dates of the investigations and by the changes that have been occurring in the office situation with the introduction of automation. None of these studies investigated the general status of clerical training within a particular geographical area or made an intensive study of formalized training procedures that companies

provide for their employees. In addition, no detailed description of a clerical training program was included in these studies that could serve as a model in reporting similar programs. Investigations, for the most part, have concentrated upon examining the various characteristics of clerical training programs item by item rather than in light of each program's total pattern.

CHAPTER III

SOURCES OF DATA AND METHODS OF PROCEDURES

This chapter describes the sources of data and the procedures used for obtaining and analyzing data about company training practices for clerical employees. A description of (1) nature and sources of data, (2) the sample, (3) instruments for data collection, (4) method of data collection, and (5) method of data analysis is presented for each phase of the study: Phase 1, Phase 2, and Phase 3.

Nature and Sources of Data

Data needed to arrive at a solution to the problem under investigation concerned securing information about the status of company training practices for clerical employees (Phase 1), about the structure of in-company formal training programs for clerical employees (Phase 2), and about the structure of training activities of outside agencies used by companies for clerical employees (Phase 3). In addition, certain background data about the geographical area were needed to facilitate interpreting the findings of the study.

Phase 1

The first phase of the study was concerned with training practices that companies provide or plan to provide for their

clerical employees. Items that were studied involved training methods, tuition aid practices, and future training plans and needs. These data were obtained from mail questionnaires completed by managerial personnel in selected companies in the Greater Boston area. A limited amount of data also was obtained from telephone interviews with managerial personnel.

Phase 2

The second phase of the study was concerned with an analysis of formal training activities that companies in Phase 1 conducted and/or sponsored for their clerical employees. The structure of these activities was studied according to purpose, administration and organization, objectives, content, and implementation. These data were obtained from personal interviews with personnel in charge of administering and/or instructing in formal programs, from observing sessions in progress, and from company materials supplied by these interviewees. Information obtained during interviews was also checked against questionnaire responses.

Phase 3

The third phase of the study was concerned with an analysis of those activities provided by out-of-company agencies that companies in Phase 1 reported using in training their clerical employees. The training function and training activities of those agencies that provided structured training programs were studied. Data were obtained through personal interviews with those in charge of training activities supplemented by participation in training sessions as

a trainee, direct correspondence with interviewees, and printed materials supplied by interviewees.

Background Data

Background data consist primarily of a description of the geographical area in which the companies were located. These data concern the population, industry, labor force, and occupational structure of the area. Data were obtained from unpublished and published federal and state documents and through personal interviews with federal and state government representatives. No special instruments were used to obtain these data.

The Sample for Phase 1

The selection of data for Phase 1 involved determining the statistical universe, sampling units, type of sample, and members to be included in the sample.

Statistical Universe

The statistical universe consisted of all business companies located in the Greater Boston area in the fall of 1963. Selection of this area was based upon the following criteria:

1. The need to select an area in and around a commercial-industrial center which could be considered to be a unified area through the integration of its economic and social activities.

2. The need to select a geographical division which could be easily described in relation to other areas of the nation and to the nation itself.

3. The need to select an area which tended to indicate patterns of population and employment development that were similar to those of the nation as a whole.

A description of the Greater Boston area is presented in Chapter 4.

Sampling Units

The business firm was selected as the sample unit. A firm or a company was defined as either (1) a single-unit organization or (2) a multi-unit organization consisting of plants, establishments, and/or divisions with varying degrees of autonomy. Independent subsidiaries were considered as separate companies.

Type of Sample

The sample for Phase 1 was selected by purposive sampling, a nonrandom sampling method. Randomization was not employed for the following reasons:

First, a simple random sampling of the population was not possible because (1) the identity of each population member was unknown and (2) the population was not homogeneous. The names of all population members located in the area had not been compiled into a single list. Published and unpublished lists of firms that were available contained only partial listings of the population. These lists were restricted to certain segments of the population, such as membership in a particular industry or a particular organization, and even then did not include all firms within the designated classification.

Second, the population was not amenable to stratification because of insufficient information about its distribution with respect to employee size and industry. Lack of information prevented dividing the population into strata according to the number of employees employed by each member with or without classification by industry. At the time the study was undertaken, no information was available in published or unpublished form concerning the total number of firms located in the Boston area which were classified according to the various employee-size categories with or without further classification by industry.[1] In addition, available lists of firms which listed particular segments of the population often did not specify employee size.

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[1]The total number of companies by employee size was given in U. S., Bureau of the Census, County Business Patterns, First Quarter, 1962, Part 1, United States Summary, (1963), p. 166.

However, the Massachusetts Division of Employment Security recently compiled data about firms located in the Boston SMSA for a special project. All firms that employ four or more persons and who are subject to the Massachusetts Employment Security Law were included in this list of firms. Therefore, it can be assumed that these data contained most of the firms in the population with 4 or more persons. These data did not identify firms by name. Each firm was listed by SIC number and by town and included average total employment based on the months of January, February, and March 1963. These data had not been summarized by size of firm and/or by industry. The investigator was permitted to tabulate these data by employee size and by industry. However, these data were not available in time to be considered for use in selecting the sample but were helpful in interpreting the findings of the study.

Third, the prime purpose of the study was to focus upon those companies most likely to conduct formalized training for clerical employees. Probability sampling seemed to be inappropriate in attempting to locate these companies. This segment of the population could be easily underrepresented by randomization.

Selection of Sample Members

The main criteria used in selecting companies for Phase 1 involved financial status, employee size, and interest in the office function. An attempt was made to select those companies leading in financial position, those employing a large number of employees, and those showing an interest in the office function.

A sample consisting of 745 companies was drawn from three sources:[2] (1) 1963 Dun and Bradstreet Million Dollar Directory,[3] (2) the Greater Boston Chamber of Commerce, and (3) the Boston Chapter of the National Office Management Association. Not included were government agencies, educational institutions, and those companies located outside of Boston that may have been included in information provided by the last two sources. Each source is described below.

All companies in Dun and Bradstreet's directory, a listing of 579 companies with headquarters in the Greater Boston area, were

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[2]The Boston Chapter of the American Society of Training Directors also provided its membership list. All companies with employee representation had been included.

[3]1963 Dun and Bradstreet Million Dollar Directory, op. cit.

included in the sample. These companies were considered to be among those leading in financial position within the area and most likely to be financially able to support formal training practices. Basic qualifications for a listing of a business in this directory is an indicated net worth of $1,000,000 or more. Included are industrial concerns, utilities, transportation companies, finance and insurance companies, wholesale and retail companies, and subsidiaries with less than qualifying net worth but deriving occupational financial strength from a formal arrangement with the parent company. Not generally included are professional and consulting agencies.

The list of companies that was drawn from Dun and Bradstreet's directory included only those companies with home offices in the Greater Boston area. Companies with locations in the Greater Boston area but home offices elsewhere were drawn from the other two sources. The Greater Boston Chamber of Commerce supplied a list of companies employing 500 and over employees. This list was compiled by the Chamber's Research and Development Department from various directories. From this list of 107 companies, 40 were included in the sample. Of the remaining 67 companies, 62 had been previously drawn from Dun and Bradstreet's directory; and 5 were not drawn because they were government agencies or educational institutions.

The Boston Chapter of the National Office Management Association provided its 1963-1964 membership list. Membership in this organization includes executives whose main line of work lies within the office management field. One of the objectives of the association

is to assist in the development of in-company educational training programs for employees. The 1963-1964 program and roster of the Boston Chapter states:[4]

> . . . members have a sense of responsibility for giving every employee on the job better working conditions, better compensation, greater happiness and security in the return for better production and greater achievement as individuals.
>
> They believe in doing the best job possible for their companies and for themselves . . . and in assisting office clerical employees to be more productive to that end.

The membership list contained 227 companies with employee representation. Of this total, 126 were drawn. Of the remaining 101 companies, 15 were deleted because they were governmental agencies or educational institutions or were located outside of the Greater Boston area; 79 had already been drawn from Dun and Bradstreet's directory; and 7, from the Greater Boston Chamber of Commerce list. Table 1 presents a summary of the total number of companies drawn from each of the three sources.

Revision of Sample

The original sample of 745 companies, which was drawn from the aforementioned sources, was revised slightly. Sixty-eight companies were deleted during a telephone check to obtain the name of the company employee who should receive a questionnaire: forty-five companies had merged recently with large companies in the sample

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[4]National Office Management Association, Boston Chapter, "Program and Roster, 1963-1964," Boston, 1963.

TABLE 1.--Sources of Companies Selected for Sample

Source	Number of Companies Listed	Revised Total[a]	Total Drawn for Sample
Dun and Bradstreet Million Dollar Directory	579	579	579
Greater Boston Chamber of Commerce	107	102	40[b]
Boston Chapter of National Office Management Association	227	212	126[c]
Total	. .	. .	745

[a]Governmental agencies, educational institutions, and firms located outside of the Boston SMSA were deleted.

[b]Companies listed in 1963 Dun and Bradstreet Million Dollar Directory were excluded.

[c]Companies listed in 1963 Dun and Bradstreet Million Dollar Directory and/or in the list supplied by the Greater Boston Chamber of Commerce were excluded.

or were subsidiaries of a parent company located at the same address; three reported that they had relocated outside of the Greater Boston area; ten were no longer in existence or were in the process of liquidation; and ten were either the trustee office of a company or a one-employee office located in the Greater Boston area with a large number of personnel employed outside of the area. The following tabulation indicates the nature of these deletions:

	No. of Firms	No. of Firms
Original Sample		745
Reasons for Deleting Sample Members:		
Duplicates (mergers, subsidiaries at the same location)	45	
Firms relocated outside of area	3	
Firms no longer in existence or being liquidated	10	
Questionnaire did not apply--no clerical employees (Trustee office of firm, one company employee in area with large numbers of employees outside of area)	10	
Total Deletions		68
Revised Sample		677

The revised sample contained 677 companies. Table 2 shows the distribution of these companies by industrial classification and by size of company.

Representativeness of Sample

Generalizations can be made only for the population which the sample represents. It is desirable to know whether or not the companies included in the sample are distributed by size and by type of business in approximately the same proportions as are known to exist in the population.

Data about those companies in the population containing four or more employees were obtained from the Massachusetts Division of Employment Security. (See footnote 1.) This information was

TABLE 2.--Distribution of Companies Selected for Sample by Industrial Classification and by Size of Company, 1963-1964[a]

Industrial Classification[b]	Size of Company								
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	Total
	Expressed in % of those responding in each category above.								
Agriculture, Forestry, and Fisheries	. .	. .	. .	1.0	.6	. .	. .	. .	.3
Mining	. .	. .	2.5	. .	. .	. .	. .	. .	.3
Construction	. .	. .	. .	4.1	2.5	1.7	3.1	1.2	1.9
Manufacturing	. .	8.8	14.8	15.5	46.0	61.7	67.2	52.4	39.4
Transportation, Communication, and Utilities	. .	4.4	1.2	2.1	6.8	2.5	. .	12.2	4.4
Wholesale Trade	. .	19.1	23.5	25.8	14.9	7.5	3.1	. .	13.6
Retail Trade	25.0	7.4	11.1	13.4	2.5	8.3	17.2	12.2	9.3
Finance, Insurance, and Real Estate	25.0	44.1	35.8	33.0	19.3	10.8	3.1	15.9	22.3
Services	50.0	16.2	11.1	5.2	7.5	7.5	6.3	6.1	8.4
Total	100.0	100.0	100.0	100.1[c]	100.2[c]	100.0	100.0	100.0	99.9[c]
(No. of companies in each size of company category)	(4)	(68)	(81)	(97)	(161)	(120)	(64)	(82)	(677)

[a]See Appendix G, Table 41, for a table that includes number as well as percentage of companies in each category.

[b]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[c]The percentages in this table and in other tables in this chapter will not necessarily add to 100 per cent because of rounding.

tabulated by size and by type of company as shown in Tables 3 and 4 according to percentages of row and column totals, respectively.

Chi-square analysis for goodness of fit was used to determine whether there was any significant difference between population and sample frequencies. The computed value of chi square was not beyond the 5 per cent probability level for each of the following null hypotheses:

1. No significant difference exists between the distribution of the sample and that of the population containing companies employing 500 and over employees with regard to company size.[5]

2. No significant difference exists between the distribution of the sample and that of the population containing companies employing 500 and over employees with regard to type of company.

This implies that the sample distribution of companies with 500 and over employees does not differ significantly from the population distribution of companies with 500 and over employees classified by size and by industry, respectively. Other null hypotheses that were

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[5]The list of companies compiled from data provided by the Massachusetts Division of Employment Security contained 76 companies in the 1,000 and over category, whereas the list of companies in the sample contained 82 companies in this category. Additional data about the companies included in the population were obtained from the Massachusetts Division of Employment Security in order to examine this discrepancy. It was found that between the time data were collected by the Massachusetts Division of Employment Security and the time that data were collected for this study various fluctuations in employment, as to be expected, had occurred. In particular, six of the companies had slightly increased their employee size to the extent that they now were classified in the 1,000 and over size category rather than in the 500-999 size category. As a result, the population data were adjusted when testing this hypothesis.

TABLE 3.--Composition of the Population of Companies Located in Boston SMSA Employing Four or More Employees by Industrial Classification and by Size of Company, First Quarter 1963[a]

Industrial Classification[b]	Size of Company								
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	Total
	Expressed in % of those reported in each industrial classification.								
Agriculture, Forestry, and Fisheries	. .	74.4	22.5	2.5	.6	. .	. .	. .	100.0
Mining	. .	75.0	25.0	. .	. .	. .	. .	. .	100.0
Construction	. .	82.6	12.1	3.7	1.3	.2	. .	.1	100.0
Manufacturing	. .	53.4	24.5	10.8	6.6	2.5	1.2	1.0	100.0
Transportation, Communication, and Utilities	. .	72.2	14.9	6.2	4.0	1.3	.8	.7	100.1
Wholesale Trade	. .	77.4	15.3	4.4	2.3	.4	.2	. .	100.0
Retail Trade	. .	82.6	11.3	4.0	1.4	.4	.2	.1	100.0
Finance, Insurance, and Real Estate	. .	74.6	12.8	6.4	4.3	.8	.5	.7	100.1
Services	. .	78.9	14.5	3.9	2.0	.6	.1	.1	100.1
Total	. .	75.5	14.9	5.3	2.8	.8	.4	.3	100.0
(No. of companies in each size of company category)	. .	(18,590)	(3,677)	(1,311)	(679)	(200)	(93)	(76)	(24,626)

[a]See Appendix G, Table 42, for a table that includes number as well as percentage of companies in each category.

[b]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

Source: Computed from Covered Employment--Employers of Four or More, First Quarter 1963, By Area, By Industry, By Size, Boston SMSA, Commonwealth of Massachusetts, Division of Employment Security, Boston, Massachusetts.

TABLE 4.--Composition of the Population of Companies Located in Boston SMSA Employing Four or More Employees by Industrial Classification and by Size of Company, First Quarter 1963[a]

Industrial Classification[b]	Size of Company							
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	Total
	Expressed in % of those reported in each category above.								
Agriculture, Forestry, and Fisheries	. .	.6	1.0	.3	.1	. .	. .	. .	.6
Mining	. .	.1	.1	. .	. .	. .	. .	. .	.1
Construction	. .	9.2	6.8	5.9	3.8	2.5	. .	2.6	8.4
Manufacturing	. .	11.3	26.3	32.4	38.1	49.5	50.5	52.6	16.0
Transportation, Communication, and Utilities	. .	4.5	4.7	5.5	6.8	7.5	9.7	10.5	4.7
Wholesale Trade	. .	13.2	13.2	10.6	10.9	6.5	7.5	. .	12.9
Retail Trade	. .	34.8	24.0	23.7	16.3	14.5	18.3	13.2	31.8
Finance, Insurance, and Real Estate	. .	6.7	5.8	8.1	10.6	6.5	8.6	14.5	6.8
Services	. .	19.5	18.0	13.5	13.3	13.0	5.4	6.6	18.6
Total	. .	99.9	99.9	100.0	99.9	100.0	100.0	100.0	99.9
(No. of companies in each size of company category)	. .	(18,590)	(3,677)	(1,311)	(679)	(200)	(93)	(76)	(24,626)

[a]See Appendix G, Table 43, for a table that includes number as well as percentage of companies in each category.

[b]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

Source: Computed from Covered Employment--Employers of Four or More, First Quarter 1963, By Area, By Industry, By Size, Boston SMSA, Commonwealth of Massachusetts, Division of Employment Security, Boston, Massachusetts.

formulated and tested were beyond the 5 per cent probability level and therefore were rejected.[6]

The Sample for Phase 2

The sample for Phase 2 consisted of a subsample of Phase 1. It was composed of 41 companies that were determined to be conducting formal training activities for their clerical employees.

The Sample for Phase 3

The sample for Phase 3 consisted of those out-of-company training agencies that companies included in Phase 1 reported using or planning to use in training their clerical employees. These agencies included educational activities provided by equipment suppliers, trade associations, consulting organizations, and other organizations. Educational institutions that provided regular course offerings were not included in this sample.

Instruments for Data Collection

Phase 1

Data pertaining to the present and future status of company training for clerical employees were collected mainly through the use of a questionnaire (see Appendix A) which was sent to managerial personnel in the companies selected. In a few cases a limited amount

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[6]See Appendix J for null hypotheses that were examined and for computation of chi-square analyses.

of data was also obtained from telephone interviews with managerial personnel. The mail questionnaire was adapted as a guide in seeking information through this method. The first two sections of the mail questionnaire were used.

The questionnaire, divided into four sections, consisted largely of fixed-alternative questions with a few open-ended questions. A trial questionnaire was submitted to the investigator's doctoral committee, representatives of the National Office Management Association, and personnel directors of 25 companies drawn from the revised sample of companies.

Phase 2

A personal interview was used to gather data from managerial personnel about the structure of in-company training programs for clerical employees. Information was obtained partially through the use of a semi-structured interview outline (see Appendix B) incorporating basic elements thought to be necessary in a study of this nature.[7] The interview guide was designed to gather data about training programs with regard to purpose, administration and organization, objectives, content, implementation, and future training plans.

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[7]No conceptual framework for analyzing clerical training programs was found that could be used as a guide. In most studies of clerical training programs certain components were missing. In addition, characteristics of training programs, for the most part, were identified and interpreted in isolation and not within the framework of which each one was part. This situation necessitated identifying basic elements to be studied by reviewing reports of company training practices and by examining references concerned with theoretical aspects that might involve the different elements of any training program.

Phase 3

A personal interview also was used to obtain information about out-of-company training agencies that were being used or were to be used by respondents in training their clerical employees. This information was obtained from personnel in charge of these agencies partially through the use of a semi-structured interview outline. (See Appendix C.) Detailed data were sought about clerical programs with regard to purpose, administration and organization, content, implementation, participating companies, and future training plans.

Method of Data Collection for Phase 1

Questionnaire Mailees

Data about the present and future status of training for clerical employees were obtained by mail questionnaires. Questionnaires were sent to executives representing 677 companies. Because the selection of each mailee was considered an important factor in gaining reliable and usable information and in increasing the probability of response, an attempt was made to send a questionnaire to the executive in charge of the company personnel or office function. Names were obtained from the following sources: (1) 1963-1964 membership roster of the Boston Chapter of the National Office Management Association, (2) Poor's Register of Corporations, Directors and Executives,[8] and (3) Dun and Bradstreet's directory.

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[8] Poor's Register of Corporations, Directors and Executives (New York: Standard and Poor's Corporation, 1963).

If none of these sources contained the desired information, the company was contacted directly by telephone. The switchboard operator or an informed employee was asked the name of the personnel director or the person in charge of the office function.

Questionnaire Responses

In September 1963, a questionnaire, a letter of transmittal, and a letter endorsing the study from the president of the Boston Chapter of the National Office Management Association were mailed to executives representing 677 companies. (See Appendices A, D, and E.) In March 1964, executives that had not yet replied to this mailing were sent a follow-up letter (see Appendix F) and another questionnaire. Those executives that did not reply to the second mailing within one month were contacted by telephone to learn whether or not questionnaires had been received or misplaced. In a few cases a third questionnaire needed to be sent.

Of the 677 managerial employees that were sent questionnaires, 645 or 95.3 per cent responded in one of four ways: (1) by returning the questionnaire, (2) by sending a letter, (3) by making a notation on the letter of transmittal, or (4) by participating in a telephone interview. Table 5 shows the percentage distribution of these 645 companies by industrial classification and by size of company.

Of these 645 replies, 606 were usable mail questionnaires. However, the remaining 39 respondents did provide some information about their training activities. An analysis of responses to questionnaires mailed is given by the following tabulation:

TABLE 5.--Distribution of Companies Responding to Mail Questionnaires and to Telephone Calls by Industrial Classification and by Size of Company, 1963-1964[a]

Industrial Classification[b]	Size of Company								
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	Total
	Expressed in % of those responding in each category above.								
Agriculture, Forestry, and Fisheries	. .	. .	. .	1.1	.7	. .	. .	. .	.3
Mining	. .	. .	2.5	. .	. .	. .	. .	. .	.3
Construction	. .	. .	. .	3.3	2.6	1.7	3.3	1.3	1.9
Manufacturing	. .	9.5	13.9	15.2	47.0	61.5	66.7	50.6	39.4
Transportation, Communication, and Utilities	. .	4.8	1.3	2.2	6.6	2.6	. .	12.7	4.5
Wholesale Trade	. .	20.6	24.1	27.2	14.6	7.7	3.3	. .	14.0
Retail Trade	25.0	6.3	11.4	13.0	2.6	8.5	16.7	12.7	9.3
Finance, Insurance, and Real Estate	25.0	44.4	35.4	33.7	18.5	10.3	3.3	16.5	22.2
Services	50.0	14.3	11.4	4.3	7.3	7.7	6.7	6.3	8.2
Total	100.0	99.9	100.0	100.0	99.9	100.0	100.0	100.1	100.1
(No. of companies in each size of company category)	(4)	(63)	(79)	(92)	(151)	(117)	(60)	(79)	(645)

[a]See Appendix G, Table 44, for a table that includes number as well as percentage of companies in each category.

[b]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

	No. of Firms	No. of Firms	Per Cent of 677 Firms
Questionnaires Mailed		677	
Usable questionnaires received	606		
Incompleted questionnaires received . . .	7		
Letters	11		
Notations on transmittal letters	3		
Follow-up telephone calls	18		
Responses to Questionnaires and Telephone Calls		645	95.3
No response	22		
Did not wish to participate	10		
Total Nonresponse		32	4.7
Total Response and Nonresponse		677	

Questionnaire Respondents and Nonrespondents

Chi-square analysis for goodness of fit was used to determine whether or not there was any significant difference between the distribution of the respondents and that of the entire sample with respect to company size and to industrial classification.

The following null hypotheses were formulated:

1. No significant difference exists between the distribution of 606 respondents and that of the sample of 677 companies with respect to company size.

2. No significant difference exists between the distribution of 645 respondents providing complete or limited data and that of the sample of 677 companies with respect to company size.

3. No significant difference exists between the distribution of 606 respondents and that of the sample of 677 companies with respect to type of company.

4. No significant difference exists between the distribution of 645 respondents providing complete or limited data and that of the sample of 677 companies with respect to type of company.

Each of these hypotheses was tested and led to a computed value of chi square that was not significant beyond the 5 per cent probability level.[9] As a result, each hypothesis was accepted inferring that the distribution of respondents by company size and by type of company typifies both nonrespondents and respondents.

Analysis of Questionnaire Nonresponses

The failure to respond to the mail questionnaire varied with type of company and employee size of company.[10] Of the 32 nonresponding companies (see Table 6), 22 did not acknowledge the mail questionnaire and could not be reached by telephone during the follow-up. The remaining ten companies responded by letter, by notation on the questionnaire, or by telephone and indicated that they could not or did not wish to participate in the study. Reasons given included the following: "do not wish to participate" (3 firms); "questions are not applicable" (2 firms); "work load prevents participation" (2 firms); "reduction in office personnel

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[9]See Appendix K for computation of chi-square analysis for each of these null hypotheses.

[10]Information concerning total employee size of a company was obtained from industry directories or from state agencies. No information was available concerning clerical employee size of a company.

TABLE 6.--Distribution of Companies Not Responding to Mail Questionnaires and to Telephone Calls by Industrial Classification and by Size of Company, 1963-1964

Industrial Classification[ab]	Size of Company																	
	1-3		4-19		20-49		50-99		100-249		250-499		500-999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture, Forestry, and Fisheries																		
Mining																		
Construction							1	20.0									1	3.1
Manufacturing					1	50.0	1	20.0	3	30.0	2	66.7	3	75.0	3	100.0	13	40.6
Trans, Com, and Utilities									1	10.0							1	3.1
Wholesale Trade									2	20.0							2	6.3
Retail Trade			1	20.0			1	20.0					1	25.0			3	9.4
Finance, Insurance, and Real Estate			2	40.0	1	50.0	1	20.0	3	30.0	1	33.3					8	25.0
Services			2	40.0			1	20.0	1	10.0							4	12.5
Total			5	100.0	2	100.0	5	100.0	10	100.0	3	100.0	4	100.0	3	100.0	32	100.0
Per cent of 38 companies not responding			15.6		6.3		15.6		31.3		9.4		12.5		9.4		100.1	

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]See Appendix N for meanings of abbreviations used in this table.

makes responses of no significance" (1 firm); "against company policy to participate" (1 firm); and "office staff is too small" (1 firm).

Questionnaire Respondents and Population

Chi-square analysis for goodness of fit was also used to determine whether or not there was any significant difference between the distribution of the respondents and that of the population containing 500 and over employees. The following null hypotheses were formulated and tested:

1. No significant difference exists between the distribution of 606 respondents and that of the population containing 500 and over employees with regard to company size.

2. No significant difference exists between the distribution of 606 respondents and that of the population containing 500 and over employees with regard to type of company.

Each of these hypotheses was tested and led to a computed value of chi square that was not significant beyond the 5 per cent probability level.[11] As a result, each hypothesis was accepted. This inferred that the distribution of respondents employing 500 and over employees did not differ significantly from that part of the population employing a similar number of employees with regard to size and to type of company, respectively.

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[11]See Appendix L for computation of chi-square analysis for each of these null hypotheses.

Positions Held by Respondents

For purposes of interpretation an attempt was made to classify each respondent's title according to the functional area of business in which the title seems to indicate that the respondent was working. Categories included chief executive, administration function, employee relations function, finance function, and sales function.[12] Of the 606 mail respondents, 45.0 per cent of the respondents were associated with the employee relations function; and 34.3 per cent, with the administration function. Respondents most frequently reporting were those with titles indicating that they were in charge of personnel or office functions. Approximately 40.5 per cent of the respondents held titles which designated that they were in charge of personnel and/or training. Another 26.1 per cent of the respondents held titles indicating that they were in charge of the office function.

Method of Data Collection for Phase 2

Data about the structure of formal activities were obtained from personal interviews, observations of classes in session, and company materials supplied by interviewees. Arrangements were made to visit companies that were conducting formal training activities

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[12]Information supplied by Yoder and Nelson, op. cit.; George E. Terry, Principles of Management (Homewood, Illinois: Richard D. Irwin, Inc., 1964); and Improving Staff and Line Relationships, Studies in Personnel Policy, No. 153 (New York: National Industrial Conference Board, 1956).

for their clerical employees. Forty-one companies were found to be conducting such training and were asked to be interviewed. Of these companies, 38 or 92.3 per cent were personally interviewed. Interviews were completed by August 31, 1964.

An interview outline (see Appendix B) was adapted to each company's training activity and was used as a guide in interviewing management personnel in charge of the clerical training function. In some companies these employees were sharing or had delegated the instruction assignment to other personnel. In these instances interviews were also held with instructors when available. Interviews ranged in length from 30 minutes to eight hours depending upon the complexity of the company's training function and the number of people interviewed. During the conferences, the interviewer recorded the interviewee's responses verbatim in shorthand. Verification of some interviewees' responses as well as additional data were obtained from visits to training facilities, observations of classes in session, and printed or office-duplicated materials supplied by interviewees.

Method of Data Collection for Phase 3

An investigation was made of out-of-company agencies that questionnaire respondents reported utilizing in training their clerical employees. The person in charge of each of these agencies was contacted by telephone or by letter to determine the extent of training that was being offered. Excluded from the investigation were formal educational institutions, such as business schools,

colleges, and universities, providing regular course offerings that were subsidized by companies through tuition aid plans or other special arrangements.

Further study was made of those 12 agencies that offered or were planning to offer structured training programs. Data about these agencies were obtained through personal conferences with those in charge of training activities supplemented by direct correspondence with conferees and printed material supplied by them. An interview outline (see Appendix C) was used as a guide in obtaining information. Verification of some interviewees' responses as well as additional data were obtained from visits to training agencies and by observing and/or participating in training sessions. In one case the location of the agency had been changed to another state which made it impossible to conduct a personal interview and necessitated securing information by correspondence and by telephone.

Personal interviews ranged in length from two to six hours depending upon the complexity of the clerical training activities being offered. In addition, participation as a trainee in certain programs offered by four of the agencies ranged from one hour to two and a half days. Interviews were completed by August 31, 1964.

Method of Data Analysis

Data were tabulated by the traditional method of hand tabulation because relatively few cross-tabulations were needed.

Phase 1

The statistical analysis consisted primarily of tabulating answers to various items on the questionnaire and converting these totals to percentages. Tabulation of data by industry, by total employee size, and by clerical employee size was carried out where variations according to each of these factors seemed important.

The procedures that the Massachusetts Division of Employment Security use in classifying companies by their principal activity of business were followed in tabulation by industry.[13] For example, manufacturing companies represented by only sales offices in this area were classified under wholesale or retail trade; manufacturing companies with administration offices in this area were classified under manufacturing.

Information about each company's principal activity of business usually was obtained from questionnaires.[14] In a number of cases, the Massachusetts Division of Employment Security or the Massachusetts Department of Commerce were called upon for this information or for verification.

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[13]Information was obtained personally from Pauline Swiff, Senior Labor Market Economist, Massachusetts Division of Employment Security, Boston.

[14]The 1963 Dun and Bradstreet Million Dollar Directory included this information with each company listing. However, this information could not be used for those companies drawn from this source, as the principal activity that was listed for a company might not apply to that part of the company located in the Boston SMSA.

Data were also tabulated by responding companies' total employee size as well as by their clerical employee size. The investigator selected the employee breakdown used by the federal government in reporting census data and certain research findings. The adoption of this classification permitted using census data and the findings from government studies for purposes of interpreting and comparing with the findings of this study.

Chi-square analysis was used to determine the possible existence of any relationship between companies with formal training and those without such training with respect to certain variables.

Phase 2

Information obtained from a case study of a training program may be classified in several ways. A review of other studies about company training programs showed that data usually were presented in statistical summaries. In these studies data were classified item by item and not in light of the total pattern.

Classifications used by some of these investigators are as follows: Wuthenow[15] grouped data about formal training programs for general clerical employees according to aims, methods, materials, and content. Harrison[16] classified data about in-service training programs for beginning stenographic employees according to

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[15]Wuthenow, op. cit.

[16]Harrison, op. cit.

(1) training program organization and selection of personnel, (2) training program trainees and instructors, and (3) training program subject concerned with training period, class size, trainees in classes, course objectives, teaching methods, materials, course content, evaluation of trainee, and standards. Dartnell[17] classified information about training programs for office employees according to objectives, philosophy, scope, location, schedule, and eligibility.

Studies of training programs that have been presented in case form usually have been concerned with programs designed for other employee categories. Thomas[18] studied the training programs that two companies were providing for all of their employees. None of the programs provided by these two companies were designed especially for clerical employees. Nevertheless, this study was helpful in identifying those elements of a training program that were thought to be necessary in a case study of clerical training programs. Thomas classified data about training according to (1) purpose, (2) organization and administration involving place in organization structure, budget, group to whom offered, pattern for past few years, and plans for the future, and (3) implementation involving content, physical facilities, selection of trainees, instructors, methods and materials of teaching, and evaluation.

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[17]Dartnell, op. cit.

[18]Thomas, op. cit.

Serbein[19] presented case examples of training for management and professional technical employees. He included content and procedures in each of his program descriptions. He also presented a detailed case study of the educational program of a large company. Data were classified according to (1) organization of the firm and (2) programs and courses. The second category was further classified by participants involved and by type of training.

DePhillips et al.[20] in Management of Training Programs discussed training with regard to why train, training effectively, the purpose of training, evaluation of training, and training as a management function within the framework of a philosophy of management and training. Various elements involved in training programs are identified and grouped according to (1) trainee-learning procedures and (2) organization and administration.

All of this information was helpful in developing a plan for presenting the findings of each case study. The extensiveness and the degree of formality of clerical training activities conducted or planned by companies varied widely among those companies interviewed. Case studies, therefore, were divided into two groups according to the extent of structural analysis that could be applied meaningfully to each company's in-company formal training activity.

The first group contains case studies of 17 companies. Each case study presents an overview of a company's clerical training

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[19]Serbein, op. cit.

[20]DePhillips, Berliner, and Cribbin, op. cit.

function. Within this frame the company's formal training activities are presented. These activities are classified according to (1) in-company training and (2) out-of-company training. The structure of present and future in-company training is examined, when possible, according to purpose, administration and organization, objectives, content, and implementation. Out-of-company training is examined according to tuition aid plans and other outside agencies utilized in training clerical employees. These classifications were selected on the assumption that the various facets of formal training activities can be included within one of these structural elements.

The second group contains case studies of 21 companies. Each of these companies conducted a less structured and/or a limited amount of formal training activity. In each of these studies, only the company's in-company and out-of-company formal training activities are described.

Phase 3

Findings involving formal clerical training conducted by agencies outside of a company's jurisdiction were also presented in case form. Each case study describes the training function and those training activities being offered and/or planned for clerical employees. The same structural analysis used in Phase 2 was applied, when possible and feasible, to these findings.

Twelve out-of-company training agencies being used or to be used by questionnaire respondents were described. The write up of each agency was submitted to each conferee for approval.

Summary

Data needed to arrive at a solution to the problem under investigation concerned securing information from managerial personnel in selected companies located in the Greater Boston area about the status of training practices for clerical employees (Phase 1), about the structure of formal training activities provided by companies for their clerical employees (Phase 2), and about the structure of those activities offered by out-of-company agencies that companies use in training their clerical employees (Phase 3).

Data for Phase 1 were obtained from responses to mail questionnaires. Of the 677 managerial employees that were sent questionnaires, 645 or 95.3 per cent responded by mail or by telephone. Of these replies, 606 were usable questionnaires. Data for Phases 2 and 3 were obtained from personal interviews and in one case from telephone interviews. Thirty-eight interviews were conducted for Phase 2; and 12 interviews, for Phase 3.

Findings for Phase 1 were presented in statistical summaries classified by each company's industrial classification, total employee size, and/or clerical employee size. Chi-square analysis was used to determine the existence of any relationship between certain training practices and certain variables. Findings for Phase 2 were presented in case form and classified, when possible and feasible, according to those activities that were in-company and those that were out-of-company. Formal in-company training

activities were examined according to purpose, administration and organization, objectives, content, implementation, and future training plans. Findings for Phase 3 were also presented in case form; and, when possible, the same structural analysis used in Phase 2 was applied.

The next two chapters present background information and findings of the study. Chapter IV provides a description of the geographical area of the study. Chapter V provides information about the status and expected changes of training for clerical employees, about structured training activities provided by companies for their clerical employees, and about formal training offered by out-of-company agencies. In Volume II, Sections I and II present the case studies of companies with formal training for clerical employees; and Section III, the case studies of out-of-company agencies offering formal training for clerical employees.

CHAPTER IV

DESCRIPTION OF THE GEOGRAPHICAL AREA OF THE STUDY

This chapter defines the geographical area of the study and describes those aspects of the population, industry, labor force, and occupational structure of the area that seem necessary in assessing the clerical employment situation. A brief examination of the geographical area to which the investigation was confined provides a basis for interpreting the findings of the study and may be helpful to others concerned with clerical training who wish to utilize these findings.

Geographical Definition

The determination of the geographical area of the study was based upon the following criteria:

1. The need to select an area in and around a commercial-industrial center which could be considered to be a unified area through the integration of its economic and social activities.

2. The need to select a geographical division which could be easily described in relation to other areas of the nation and to the nation itself.

3. The need to select an area which tended to indicate patterns of population and employment development that were similar to those of the nation as a whole.

On the basis of these criteria, the definition that was developed by the Bureau of the Budget, Executive Office of the President in 1958, for the Boston Standard Metropolitan Statistical Area was selected.[1]

The Boston SMSA is one of the ten Standard Metropolitan Statistical Areas in Massachusetts. The area consists of 76 cities and towns covering 969 square miles.[2]

Population

According to the 1960 United States Census, the population of the Boston SMSA was 2,590,040. This figure represented 50.3 per cent[3] of the state's total population even though the Boston SMSA comprised only 11.7 per cent of the state's total land area.[4]

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[1]In New England, a Standard Metropolitan Statistical Area, as defined by the Bureau of the Budget, must include a group of towns which contain one city of at least 50,000 people or two continguous cities with a combined population of at least 50,000. Towns are included in an SMSA on the basis of the degree of their economic and social integration with the central city. For a more detailed explanation, see U. S., Bureau of the Census, U. S. Census of Population: 1960, Vol. I, Characteristics of the Population, Part 23, Massachusetts, (1963), p. viii.

[2]U. S., Bureau of the Census, U. S. Census of Population: 1960, Vol. I, Characteristics of the Population, Part 1, United States Summary, (1964), p. iii.

[3]U. S., Bureau of the Census, U. S. Census of Population: 1960, Vol. I, Characteristics of the Population, Part 23, Massachusetts, (1963), pp. 273-274.

[4]U. S. Census of Population: 1960, United States Summary, op. cit., pp. 20, 111.

Between 1950 and 1960 the population growth of the Boston SMSA increased by 7.4 per cent which was substantially lower than most of the nation's other metropolitan areas. Nevertheless, of the 212 nation's SMSA's in 1960, the Boston SMSA was seventh in population rank and contained one out of every 44 people who resided in these areas.[5]

Industry

The types of industries located in an area tend to determine the occupation of its labor force. The Boston SMSA is the New England regional center for trading, finance, and service. The area has achieved world renown as the site of outstanding educational, financial, and medical facilities. Of equal importance is the scientific and technological research and development that is being carried on throughout the area. The Boston SMSA has achieved greater economic diversity and relies to a greater degree upon employment in trade, finance, and service industries in contrast to some of the other metropolitan areas in the United States.[6]

Within the Boston SMSA may be found some representation of practically any industry found elsewhere in Massachusetts; yet, the Boston SMSA's pattern of industrial distribution differs from the other areas of Massachusetts. A comparison of its industrial distribution with that of the state's tends to obscure marked differences,

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[5] Ibid., pp. 106, 117.

[6] U. S. Census of Population: 1960, United States Summary, op. cit., p. 295

as the Boston SMSA accounts for approximately half of the state's total labor force. Table 7 has been devised to contrast the industrial distribution of the employed work force with corresponding data for the remainder of the state, exclusive of the Boston area.

The dominance of the more stable nonmanufacturing industries in the Boston SMSA is evident from Table 7 even though more than 40 per cent of all Massachusetts residents employed by manufacturing businesses in 1960 resided in the Boston area. The large proportion of nonmanufacturing industries in the Boston SMSA has been a contributing factor toward keeping its unemployment rate consistently below the rates of the other Massachusetts areas with their relatively heavier concentration in manufacturing industries and consequently greater sensitivity to economic conditions. Examination of the average annual unemployment rates from 1957 to 1963 showed that the Boston SMSA unemployment rate had remained constantly below the corresponding rates for the state and for the nation.[7]

Projections for the next decade tend to indicate growth in certain manufacturing industries such as electrical machinery and instrument categories. Growth in nonmanufacturing industries, particularly in the finance, service, and government sectors, is expected to increase substantially. The transportation, communication, and public utilities category, which is especially susceptible to automation, is expected to decline as a source of employment.[8]

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[7]Manpower Report of the President, (1964), op. cit., pp. 195, 234, 237.

[8]Commonwealth of Massachusetts, Massachusetts Transportation Commission, The Boston Regional Study, prepared by Melvin R. Levin, et al. (Boston, April, 1963), pp. 75-78.

TABLE 7.--Industrial Distribution of Employed Persons in the Boston SMSA and Remainder of State, 1960

Industry[a]	Boston			Remainder of State	
	Number	Per Cent of Total	Per Cent of State	Number	Per Cent of Total
Agriculture, Forest, Fish . .	6,411	.6	20.0	19,736	2.0
Mining	597	.1	50.0	616	.1
Construction . . .	51,042	5.0	50.0	48,781	5.0
Manufacturing . .	294,434	28.8	41.5	414,834	42.5
Trans, Com, Utilities . . .	68,373	6.7	59.0	47,091	4.7
Wholesale Trade .	42,229	4.1	65.0	23,682	2.4
Retail Trade . . .	148,697	14.5	53.0	131,912	13.5
Finance, Insurance, Real Estate . .	62,810	6.1	67.0	33,497	3.5
Services	237,103	23.1	57.0	179,664	18.3
Public Adm	56,668	5.5	60.0	33,325	3.9
Ind not reported .	55,361	5.4	. .	38,849	4.0
Total	1,023,725	100.0	51.2	976,587	100.0

[a]See Appendix N for meanings of abbreviations used in this table and in other tables in this chapter.

Calculated from: U. S. Census of Population: 1960, Part 23, Massachusetts, pp. 143, 201.

The establishment in the Boston SMSA of an electronic research center by the National Aeronautics and Space Agency is expected to help stimulate employment and, as a result of its presence, to create additional jobs in other industries. This stimulus to employment will tend to be offset to some extent by layoffs in the Quincy Shipyard, by the phasing-out of the Watertown Arsenal, and by recent employee reductions in the electrical-electronics industry.

Labor Force

In 1960, the Boston SMSA's labor force contained 1,078,471 or 50.6 per cent of the Massachusetts labor force of 2,129,285. The age composition of the area's labor force differed only slightly from that of the remainder of the state, as shown in Table 8.

TABLE 8.--Composition of the Labor Force by Age Group for the Boston SMSA and Remainder of the State, 1960

Age Group	Boston		Remainder of State	
	Number	Per Cent	Number	Per Cent
14 years over . .	1,078,471	100.0	1,050,814	100.0
14 - 19	80,546	7.4	76,721	7.3
20 - 24	105,428	9.8	91,954	8.8
25 - 34	208,719	19.4	202,010	19.2
35 - 44	234,135	21.7	253,523	24.1
45 - 64	387,822	36.0	373,783	35.6
65 and over . . .	61,821	5.7	52,823	5.0
Total	1,023,725	100.0	976,587	100.0

Calculated from: U. S. Census of Population: 1960, Part 23, Massachusetts, pp. 337, 340.

Almost two-thirds of the labor force of the area in 1960 were males, as shown in Table 9. Approximately three-fourths of all men and a third of all women 14 years of age or older in the area were in the labor force. A similar pattern characterized the state and the nation as a whole.[9]

TABLE 9.--Composition of the Labor Force by Sex in Massachusetts, Boston SMSA, and Remainder of State, 1960

Labor Force	Massachusetts		Boston		Remainder of State	
	Number	Per Cent	Number	Per Cent	Number	Per Cent
Males	1,375,779	64.6	694,848	64.4	680,931	64.8
Females	753,506	35.4	383,623	35.6	369,883	35.2
Total	2,129,285	100.0	1,078,471	100.0	1,050,814	100.0

Source: U. S. Census of Population: 1960, Part 23, Massachusetts, pp. 135, 173.

From 1950 to 1960, the labor force of the Boston SMSA increased by 10.5 per cent or 102,636 persons. About 66 per cent of the net addition to the area's labor force was accounted for by the increase in the number of women workers. Most of the increase was attributed to the influx of married women (husband present) to the area's labor force. The proportion of married women (husband present) in the female labor force had risen sharply from 29.9 per cent of the

[9]U. S., Bureau of the Census, Statistical Abstract of the United States, (1961), p. 203.

1950 total of 42 per cent of the 1960 total--an increase of 46,355 workers. The number of single women in the labor force decreased from 52.5 per cent of the 1950 total[10] to 39.5 per cent of the 1960 total--a decrease of 13,430 workers.[11] Similar increases in the female labor force participation rate occurred in the state and throughout the nation.[12]

An indication of possible future trends in the magnitude and distribution of the area's labor force between 1960 through 1970 is shown in Table 10. These employment changes have been based upon projections that were furnished by the United States Department of Labor for the labor force of the state and upon the following assumptions:

1. That approximately half of the increases for the Massachusetts labor force in the two five-year periods will occur in the Boston SMSA.

2. That the increases will be divided between males and females in the same proportion as the over-all increases for the state.

These projections presage an increase of 11.1 per cent for the area's labor force. During the first five-year period, the female labor force is expected to represent the larger part of the increase, whereas during the second five-year period more men than women are expected to be added to the labor force.

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[10]U. S., Bureau of the Census, U. S. Census of Population: 1950, Vol. II, Characteristics of the Population, Part 21, Massachusetts, Chapter C, (1952), p. 163.

[11]U. S. Census of Population: 1960, Part 23, Massachusetts, op. cit., p. 345.

[12]Manpower Report of the President, (1964), op. cit., p. 209.

These projections suggest the possibility that women may represent 37.0 per cent of the area's labor force in 1970 as compared with 35.6 per cent in 1960--a net addition of 60,000 women. Similar developments have been projected for the state and for the nation as a whole.[13]

TABLE 10.--The Size and Distribution of the Labor Force in Massachusetts and Boston SMSA for 1960 Projected to 1965 and 1970

Area and Labor Force	1960		1965		1970	
	Number[a]	Per Cent	Number	Per Cent	Number	Per Cent
Massachusetts						
Males	1,376,000	64.6	1,442,000	63.3	1,498,000	63.2
Females	754,000	35.4	835,000	36.7	873,000	36.8
Total	2,130,000	100.0	2,277,000	100.0	2,371,000	100.0
Boston SMSA[b]						
Males	695,000	64.4	728,000	63.1	756,000	63.0
Females	384,000	35.6	425,000	36.9	444,000	37.0
Total	1,079,000	100.0	1,153,000	100.0	1,200,000	100.0

[a]The size of the labor force is expressed to the nearest thousand in order to be consistent with the date provided for the state of Massachusetts by the U. S. Department of Labor.

[b]The labor force projections for 1965 and 1970 for the Boston SMSA are estimates based upon the U. S. Department of Labor's projections for Massachusetts and the 1960 U. S. Census for the Boston SMSA.

Sources: Data for Massachusetts from Manpower Report of the President, (1964), p. 245. 1960 data for Boston SMSA from U. S. Census of Population: 1960, Part 23, Massachusetts, p. 173.

[13]Ibid., p. 243.

Occupational Structure

Between 1950 and 1960 the Boston SMSA's civilian labor force showed an increase of 11.9 per cent, or a total of 109,007 workers, as compared with an increase of 4.1 per cent for the state as a whole. The difference in labor force growth tended to reflect Boston SMSA's strong emphasis on white-collar occupations. The Boston SMSA relies to a greater degree upon employment in finance and service occupations than many other areas within the state and throughout the nation.

By comparing data from the 1960 U. S. Census with the corresponding data for 1950, it is possible to observe the recent occupational changes that have been taking place in the civilian occupational structure of employed men and women residing in the Boston SMSA. In examining these changes, the following qualifications should be kept in mind:

1. A part of the labor force increase can be attributed to the addition of 11 towns to the Boston SMSA boundary definition in 1958. The total population of these towns in 1960 was 76,230. Of this population, 26,850 or 35.2 per cent were in the labor force in 1960.[14]

2. The increase in the number at work also reflects the reduction of 14,870 unemployed persons in the area between 1950 and 1960.[15]

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[14]Commonwealth of Massachusetts, Department of Commerce, Town and City Monographs, Nos. 9, 23, 108, 121, 140, 152, 158, 180, 198, 201, 235, (1960).

[15]U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter C, op. cit., p. 152; U. S. Census of Population: 1960, Part 23, Massachusetts, op. cit., p. 340.

3. The changes that have occurred during this period also are affected by the increase in the number of workers whose occupations could not be identified by the United States Census Bureau on the basis of replies to its questionnaires. In the 1960 U. S. Census, 67,766 workers were in this category as compared with 8,421 for 1950.

Table 11 shows the shifts that occurred in the occupational structure of the area's work force. Professional, technical, clerical, and sales occupations have become a greater proportion of the area's total occupational structure, whereas skilled, semi-skilled, and unskilled jobs have declined in importance. Similar changes also occurred in the occupational structure of the other areas of Massachusetts.[16] In contrast to the nation's occupational profile, among the area's employed the percentage of operatives decreased more noticeably and the percentage of craftsmen declined instead of slightly increasing.[17]

The most important increases in the area's major occupational groups occurred in the professional and technical groups and in the clerical group, with increases of 39,300 and 27,300 workers, respectively. Expansion in these groups seemed to be attributed to two trends in particular: (1) the growth in nonmanufacturing industries in the Boston SMSA in which white-collar occupations tend to predominate and (2) the change in the employment structure of

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[16] U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter B, op. cit., p. 73; U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter C, op. cit., p. 169; U. S. Census of Population: 1960, Part 23, Massachusetts, op. cit., pp. 137, 187.

[17] U. S. Census of Population: 1960, United States Summary, op. cit., pp. 528-533.

TABLE 11.--Occupational Structure of Civilian Labor Force in the Boston SMSA, 1950 and 1960[a]

Occupational Group	1950		1960		Change: 1950-1960
	Number	Per Cent	Number	Per Cent	Per Cent
Professional, Technical, Kindred Workers	110,412	12.1	149,761	14.6	+35.6
Managers, Officials, Proprietors, Incl Farm	90,129	9.9	86,354	8.4	-36.4
Clerical, Kindred Workers	163,877	17.9	191,235	18.7	+16.7
Sales Workers	79,092	8.6	82,129	8.0	+3.9
Skilled Workers					
Craftsmen, Foremen, Kindred Workers	136,277	14.9	134,477	13.1	-1.3
Semi-skilled Workers					
Operatives, Kindred Workers	177,119	19.4	169,373	16.5	-4.3
Service Workers, Exc Private Household	86,187	9.4	91,108	8.9	+5.7
Unskilled Workers					
Private Household Workers	17,158	1.9	15,075	1.5	-12.1
Farm Laborers, Farm Foremen	2,650	.3	1,781	.2	-34.3
Laborers, Exc Farm and Mine	43,396	4.7	34,666	3.4	-20.1
Occupations Not Reported	8,421	.9	67,766	6.6	+707.1
Total	914,718	100.0	1,023,725	100.0	+11.9

[a]The 1960 figures include the civilian labor force for the 11 towns which were added to the Boston SMSA in 1958. The labor force data concerning these towns could not be added to the 1950 figures, as the data for the smaller towns in the group were not available. It appears likely that the inclusion of these data in the 1950 figures would not result in any significant changes in the data shown for the Boston SMSA.

Sources: Data for 1950 from U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter B, p. 73. Data for 1960 from U. S. Census of Population: 1960, Part 23, Massachusetts, pp. 432-436.

manufacturing industries in which the number of production workers declined or remained the same, whereas the proportion of white-collar factory personnel increased significantly.

Clerical and Kindred Occupational Group

In 1960, clerical workers in the Boston SMSA numbered 191,235, which represented 18.7 per cent of the area's labor force. Between 1950 and 1960 clerical employees in the area increased by only 16.7 per cent as compared with 25.2 per cent for the remainder of the state and 33.8 per cent for the nation. Nevertheless, 58.8 per cent of the state's total clerical workers were employed in the Boston SMSA.[18]

The recent changes that have occurred in the industrial composition of the clerical group are shown in Table 12. Of the 27,348 workers added to the area's clerical and kindred occupational group between 1950 and 1960, the following industries accounted for the largest numbers: services (12,682), manufacturing (7,094) finance (6,269), and retail trade (3,076). These increases are reflections of the growth of nonmanufacturing industries, such as trade, services, finance, and insurance, which employ large numbers of clerical workers as well as the sizable expansion in the electrical-electronics industry and related research and development

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[18] U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter C, op. cit., pp. 277-278; U. S. Census of Population: 1960, Part 23, Massachusetts, op. cit., pp. 362, 374.

TABLE 12.--Industrial Composition of Clerical Occupation Group in the Boston SMSA, 1950 and 1960

Industry	1950		1960		Change: 1950-1960
	Number	Per Cent	Number	Per Cent	Per Cent
Agriculture, Forest, Fish . .	180	.1	255	.1	+.1
Mining	71	.1	109	.1	a
Construction . . .	2,170	1.3	2,830	1.5	+.4
Manufacturing . .	36,904	22.5	43,998	23.0	+4.0
Trans, Com, Utilities . . .	21,350	13.0	19,751	10.3	-1.0
Wholesale Trade .	10,920	6.7	10,843	5.7	-.1
Retail Trade . . .	17,960	11.0	21,036	11.0	+1.9
Finance, Insurance, Real Estate . .	26,952	16.4	33,221	17.4	+3.8
Services	22,774	13.9	35,456	18.5	+7.7
Public Adm	23,252	14.2	23,267	12.2	a
Ind not reported .	1,354	.8	469	.2	-.5
Total	163,887	100.0	191,235	100.0	+16.7

[a]Less than .05 per cent.

Sources: Data for 1950 from U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter C, pp. 277, 278. Data for 1960 from U. S. Census of Population: 1960, Part 23, Massachusetts, pp. 432-436.

organizations which have been outstanding features of the area's recent progress.

The source of much of this growth to the area's clerical occupational growth was drawn from the increasing number of women who have been entering the labor force market, as shown in Table 13. Between 1950 and 1960 women accounted for 85.9 per cent of the clerical group's net growth. In 1960, women represented 69.0 per cent of the sex distribution of the clerical group--an increase of 2.7 per cent over the corresponding figure for 1950. Yet, despite the fact that the proportion of males in the clerical group decreased, the absolute number of males engaged in clerical occupations did increase to some extent during this period. Nevertheless, the predominant source of the area's clerical workers was working women. The state and the nation reported similar patterns of clerical occupational growth.

Although the future increases are a matter of conjecture, an indication of the continued growth of the clerical work force was reported by the Manpower Skills Survey. This study was conducted by the Bureau of Business Research of Boston College for The Division of Employment Security, Commonwealth of Massachusetts, to obtain estimates of certain major aspects of labor supply and demand in selected semi-professional, skilled, and semi-skilled occupations between mid-1963 and mid-1966 in the Boston SMSA.

Based upon the assumption that present 1963 trends will continue in business, technology, and science, a representative cross-section of 653 employers was asked to estimate the number of new workers

TABLE 13.--Labor Force Distribution of the Clerical Occupational Group by Sex in the Boston SMSA, 1950 and 1960[a]

Clerical Group	1950		1960		Change: 1950-1960	
	Number	Per Cent	Number	Per Cent	Number	Per Cent
Males	55,464	33.8	59,315	31.0	3,851	14.1
Females	108,423	66.2	131,920	69.0	23,497	85.9
Total	163,887	100.0	191,235	100.0	27,348	100.0

[a]The 11 towns which were added to the Boston SMSA definition in 1960 had a total population of 76,230 and a total civilian labor force of 26,850 persons. The population of these towns in 1950 was 40,586. Labor force data for the smaller towns in this groups were not readily available. It is believed that the inclusion of the population and labor force data in the 1950 figures would not result in any significant change in the data shown for the SMSA.

Sources: Data for 1950 from U. S. Census of Population: 1950, Part 21, Massachusetts, Chapter C, pp. 277, 278. Data for 1960 from U. S. Census of Population: 1960, Part 23, Massachusetts, p. 187.

needed for expansion and for replacing labor force dropouts in 81 selected occupations for this period. These employers indicated that half of the total employee demand for expansion and most of the total employee demand for replacement would be concentrated in the clerical and sales categories.[19]

From 1964 through 1966 the projected over-all increase in employment is to be distributed particularly among the manufacturing,

[19]Bureau of Business Research, College of Business Administration, Boston College, Manpower Skills Survey (Chestnut Hill, Massachusetts: Boston College Press, 1964), p. 2.

trade, and services industries. Smaller upward employment trends were also indicated for government, transportation, and finance.[20]

Although these projections took into account prospective declines in work forces reported by responding employers, they did not include any allowance for employment by new employers who may be expected to begin business in the area during the projection period. As previously mentioned, a source of new employment for the Boston SMSA's work force appears to be the Electronic Research Center established by NASA. An indication of future need for clerical employment tends to be implied from a recent report by NASA which said that clerical and administrative personnel employed at five of their present bases constituted between 13 to 31 per cent of total employees.[21]

Summary

The Boston SMSA is one of ten Standard Metropolitan Statistical Areas in Massachusetts and covers 11.7 per cent of the state's total land area. In 1960, the Boston SMSA contained 50.3 per cent of the state's total population and ranked seventh in population among the nation's 212 SMSA's.

The Boston SMSA has achieved greater economic diversity and has been relying to a greater degree upon trade, finance, and services

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[20] Ibid., pp. 8-9.

[21] "Office Education: A Source of Skilled Office Personnel," Washington Report, Special Supplement, December 20, 1963, p. 2.

industries than other areas in Massachusetts and other metropolitan areas in the United States. Projections for the Boston SMSA for the next decade indicate growth in certain manufacturing industries such as electrical machinery and instrument categories. Growth in nonmanufacturing industries, particularly finance, services, and government sectors, is expected to increase substantially; however, the transportation, communication, and public utilities category, which is especially susceptible to automation, is expected to decline as a source of employment. The establishment of an electronic research center by the National Aeronautics and Space Agency is expected to help stimulate employment and to offset employment decreases in other sectors.

In 1960, the Boston SMSA's labor force, which represented 50.6 per cent of the Massachusetts labor force, numbered slightly over one million--an increase of 10.5 per cent over the corresponding figures for 1950. Projection for the next decade indicates an increase of 11.1 per cent in the labor force. The state and the nation as a whole show similar developments

Between 1950 and 1960 the occupational structure of the Boston SMSA showed changes somewhat similar to those of other areas of Massachusetts and the nation as a whole. The number of professional, technical, clerical, and sales occupations now represents a greater proportion of Boston SMSA's total number of occupations, whereas the number of skilled, semi-skilled, and unskilled jobs has declined proportionally. Increases in the professional,

technical, and clerical groups were generally attributed (1) to the growth in nonmanufacturing industries in which white-collar occupations tend to predominate and (2) to the changes in the employment structure of manufacturing industries in which the proportion of white-collar factory personnel increased.

In 1960, 18.7 per cent of the Boston SMSA's labor force were clerical workers. This group represented 58.8 per cent of the state's total number of clerical workers. Employers in the area have projected that between mid-1963 and mid-1966 half of the total employee demand for expansion and most of the total employee demand for replacement will be concentrated in the clerical and sales categories. Employers have also projected that from 1964 through 1966 the over-all increase in employment is to be distributed particularly among manufacturing, trade, and services industries. This projection did not include employment by new employers who may be expected to begin business in the area during this period, such as the Electronic Research Center established by NASA.

CHAPTER V

THE FINDINGS

This chapter presents the findings pertaining to (1) the status of company training for clerical employees and the expected changes, (2) characteristics and structure of formal training activities that companies were conducting and/or sponsoring for their clerical employees, and (3) the nature and scope of those formal training activities conducted by out-of-company agencies. The findings reflect prevailing practices and needs at the time of the study. No attempt was made to evaluate the quality of training activities.

The chapter is divided into five parts: (a) the environment of training, (b) present company training practices, (c) anticipated future of training, (d) structure of in-company formal training programs, and (e) structure of out-of-company formal training programs.

A. The Environment of Training[1]

Important factors to consider in studying company training practices for clerical employees include the nature of the company's economic function, the size of its total labor force, and the size

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[1]Findings in this section are based on a mail questionnaire to 677 companies. Of these companies, 645 responded by mail or by telephone. Of these replies, 606 were usable mail questionnaires.

of its clerical force. The first section of the mail questionnaire was designed to secure this information.

Nature of Business

Respondents were requested to identify the nature of their business. Table 14 presents the percentage distribution of 606 companies providing usable questionnaires classified by industry. Most frequently reporting were respondents from companies classified as manufacturing (40.1 per cent) or as finance, insurance, and real estate (23.4 per cent).

This distribution of companies by industrial classification differs somewhat from the population of companies in Boston. Industries that contained, for the most part, companies of small-employee size were underrepresented, as the criteria used in selecting companies to be studied were not designed to produce a miniature population. However, the results from chi-square analysis suggest that no significant difference exists between the distribution by industry of those responding companies employing 500 and over employees and the distribution by industry of those companies in the population employing a similar number of employees.

Total Size of Company

Table 14 also presents the percentage distribution of usable questionnaires by size of company. The majority (77.2 per cent) of these companies employed between 4 and 499 employees. Companies employing 500 and over employees were less frequently represented, with 9.7 per cent in size category 500-999 and with 12.7 per cent in size category 1,000 and over. Yet these companies represented a

TABLE 14.--Distribution of Companies Completing Mail Questionnaires by Industrial Classification and by Size of Company, 1963-1964[a]

Industrial Classification[b]	Size of Company								
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	Total
	Expressed in % of those responding in each category above.								
Agriculture, Forestry, and Fisheries	. .	. .	. .	1.2	.7	. .	. .	. .	.3
Mining	. .	. .	2.7	. .	. .	. .	. .	. .	.3
Construction	. .	. .	. .	3.7	2.7	1.8	3.4	1.3	2.0
Manufacturing	. .	9.8	13.3	17.1	46.3	61.1	66.1	49.4	40.1
Transportation, Communication, and Utilities	. .	5.9	1.3	2.4	6.8	2.7	. .	13.0	4.8
Wholesale Trade	. .	13.7	22.7	23.2	14.3	7.1	3.4	. .	12.2
Retail Trade	. .	7.8	10.7	12.2	2.7	8.8	17.0	13.0	9.2
Finance, Insurance, and Real Estate	50.0	52.9	37.3	37.8	19.0	10.6	3.4	16.9	23.4
Services	50.0	9.8	12.0	2.4	7.5	8.0	6.8	6.5	7.6
Total	100.0	99.9[c]	100.0	100.0	100.0	100.1[c]	100.1[c]	100.0	99.9[c]
(No. of companies in each size of company category)	(2)	(51)	(75)	(82)	(147)	(113)	(59)	(77)	(606)
Per cent of 606 companies responding	.3	8.4	12.4	13.5	24.3	18.6	9.7	12.7	99.9[c]

[a]See Appendix G, Table 46, for a table that includes number as well as percentage of companies in each category.

[b]Companies are classified according to the 1957 revision of the Standard Industrial Classification in this table and in other tables in this chapter that classify companies by industry.

[c]The percentages in this table and in other tables in this chapter will not necessarily add to 100 per cent because of rounding.

possible 78.7 per cent of the 169 companies in the population that employed 500 and over employees.

The distribution of responding companies by size classification differs from the population of companies. Available information about the population shows that the majority of companies employed fewer than 20 employees. However, companies with a small number of employees were judged to be less likely to be conducting formalized training practices than those employing a large number of employees. Therefore, the criteria used in selecting companies for the sample were designed to include those companies more likely to be employing a large work force. Chi-square analysis suggests that no significant difference exists between the distribution of responding companies employing 500 and over employees and the distribution of that part of the population employing a similar number of employees when classified by size.[2]

Clerical Size of Company

Table 15 shows the percentage distribution of usable questionnaires by clerical size and by industrial classification. Of these companies, 76.4 per cent employed fewer than 100 clerical employees.

As might be expected, the size of the office tends to be directly related to size of company and to industrial classification. The nature of a company's business has a particular bearing upon office size. The size of the office represents a larger proportion of the total employee size of those companies in which white-collar

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[2]See Chapter III and Appendix J for a discussion of statistical analysis.

TABLE 15.--Distribution of Companies Completing Mail Questionnaires by Industrial Classification and by Size of Office, 1963-1964[a]

Industrial Classification	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Agriculture, Forestry, and Fisheries	2.7	. .	.7	. .	. .	. .	. .	. .	. .	.3
Mining	. .	1.2	. .	. .	. .	. .	. .	. .	. .	.3
Construction	10.8	2.9	1.3	. .	1.3	. .	. .	. .	. .	2.0
Manufacturing	18.9	36.5	45.8	41.3	52.6	34.8	33.3	8.3	45.5	40.1
Transportation, Communication, and Utilities	5.4	3.5	3.3	4.8	3.8	8.7	11.1	25.0	9.1	4.8
Wholesale Trade	13.5	17.6	14.4	14.4	2.6	. .	. .	. .	. .	12.2
Retail Trade	13.5	9.4	5.2	6.7	12.8	13.0	11.1	8.3	36.4	9.2
Finance, Insurance, and Real Estate	18.9	22.9	20.9	25.0	23.1	30.4	33.3	58.3	. .	23.4
Services	16.2	5.9	8.5	7.7	3.8	13.0	11.1	. .	9.1	7.6
Total	99.9	99.9	100.1	99.9	100.0	99.9	99.9	99.9	100.1	99.9
(No. of companies in each size of company category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)
Per cent of 606 companies responding	6.1	27.9	25.2	17.2	13.0	4.0	3.0	2.0	1.8	100.2

[a]See Appendix G, Table 47, for a table that includes number as well as percentage of companies in each category.

occupations tend to predominate than of those companies in which production workers tend to predominate.

Table 16 shows the distribution of usable returns by total company size and by clerical size. Visual inspection shows a correlation between clerical size and total employee size. Comparison of Tables 14 and 15 further shows that clerical employees represented a small percentage of the total work force of those companies classified as manufacturing, services, construction, agriculture, wholesale trade, and retail trade. On the other hand, clerical employees represented a large proportion of the total work force of those companies classified as finance, insurance, and real estate and as transportation, communication, and utilities. For example, of the 77 companies employing 1,000 and over total employees, about one-half were in the manufacturing category; and the remaining were mainly in the finance, utilities, and retail trade categories. But only 12 of these 77 companies reported employing 1,000 and over clerical employees: nearly 60 per cent were from finance and 25 per cent were from utilities; only about 8 per cent were from manufacturing.

B. Present Company Training Practices[3]

Part one of the questionnaire contained eight questions designed to determine the present status of company training practices for clerical employees among companies located in the

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[3] See footnote 1 of this chapter for information about the sample on which these findings are based.

TABLE 16.--Distribution of Companies Completing Mail Questionnaires by Size of Company and by Size of Office, 1963-1964

Size of Company	Size of Office																			
	1-3		4-19		20-49		50-99		100-249		250-499		500-999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
1-3	2	5.4	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
4-19	16	43.2	35	20.6	..	..	..	..	..	..	..	..	..	..	..	..	..	..	51	8.4
20-49	6	16.2	45	26.5	24	15.7	..	..	..	..	..	..	..	..	..	..	..	..	75	12.4
50-99	6	16.2	28	16.5	34	22.2	14	13.5	..	..	..	..	..	..	..	..	..	..	82	13.5
100-249	5	13.5	39	22.9	48	31.4	37	35.6	17	21.8	..	..	..	..	..	..	1	9.1	147	24.3
250-499	1	2.7	19	11.2	33	21.6	32	30.8	15	19.2	8	34.8	..	..	..	..	5	45.5	113	18.7
500-999	..	..	3	1.8	12	7.8	14	13.5	23	29.5	4	17.4	1	5.6	..	..	2	18.2	59	9.7
1,000 and over	1	2.7	1	.6	2	1.3	7	6.7	23	29.5	11	47.8	17	94.4	12	100.0	3	27.3	77	12.7
Total	37	99.9	170	100.1	153	100.0	104	100.1	78	100.0	23	100.0	18	100.0	12	100.0	11	100.1	606	100.0

Boston SMSA. Responses to these questions were tabulated by clerical size of company, by type of company, and by total size of company when discussing formal training practices.

Position Titles of Personnel in Charge of Clerical Training

Titles of personnel in charge of training clerical employees are listed in Table 17. Titles are grouped by functional areas of business and by broad position categories for purposes of interpretation and facility in handling data. No attempt was made to classify titles by varying degrees of responsibility or by line and staff structure, as few titles accurately describe what the job holder does. In addition, the wide variety of titles made it impractical to list all possible titles. Similar or comparable titles were grouped under a common title when possible.[4]

Responsibility for training was most frequently delegated to managerial employees. More than one-half (53.3 per cent) of the respondents reported that personnel in the administration function were in charge of clerical training. Companies placed the responsibility for clerical training in the same functional area even though they possibly differed in the kind of responsibility and job duties assigned to such personnel. In at least 50 per cent of the companies, the title of the employee that was reported in charge of clerical training or sharing this responsibility appeared to be an employee performing the function of a department head.

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[4]See Chapter III, footnote 12, for information concerning references used in classifying titles. Titles that were grouped under a similar or comparable title are listed in Appendix I.

TABLE 17.--Position Titles of Personnel in Charge of Training Clerical Office Workers in 606 Responding Firms

Position Title[abc]	No.	%[d]	Position Title	No.	%	Position Title	No.	%
Adm--Top Management			Plant Mgr AND Sales Mgr	1	.2	Pers Dir AND Off Mgr.	1	.2
[a]President	3	.5	[a]Office Manager	125	20.6	Pers Dir AND Supvr(s)	2	.3
Vice President	5	.8	Asst Off Manager	2	.3	Pers Mgr OR Pers Asst	1	.2
Vice Pres and Cashier	1	.2	IBM Supvr OR Off Mgr	2	.3	Pers Opns Offr AND Supvrs	1	.2
Staff Asst to President	1	.2	Off Mgr OR Asst Off Mgr	1	.2	PR Offr AND Supvr(s).	1	.2
Senior Partner	1	.2	Off Mgr AND Asst Treas	2	.3	Finance		
Pres, Treas, AND Asst Treas	1	.2	Off Mgr AND Asst Vice Pres	1	.2	[a]Treasurer	24	4.0
Adm--Other			Off Mgr AND Dept Head	3	.5	Asst Cashier	1	.2
Administrative Assistant.	1	.2	Off Mgr AND Dept Repr	1	.2	[a]Asst Treasurer	17	2.8
[a]Administrative Director	2	.3	Off Mgr AND Exec Secy	1	.2	Asst Treas AND Comptr	1	.2
Asst Vice President	4	.7	Off Mgr AND Supervisor	2	.3	Asst Treas OR Chf Teller	1	.2
[a]Officer	2	.3	Off Mgr OR Dept Supvr	4	.7	Treas AND Asst Treas.	1	.2
Adm Asst OR Indiv Supvrs.	1	.2	[a]Supervisor(s)	56	9.2	Treas AND Head Secy	1	.2
Dir of Adm AND Indiv Depts	1	.2	Supvr OR Fellow Employee.	1	.2	Sales		
Vice Pres AND Gen Manager	1	.2	Supvr OR Predecessor	1	.2	District Sales Mgr	1	.2
[a]Department Head	109	18.0	Varies with department	1	.2	Sales Manager	3	.5
Assistant Manager	1	.2	Employee Relations			Fellow Worker	1	.2
Dept Hd OR Branch Mgr	1	.2	[a]Personnel Director	52	8.6	Does not apply	9	1.5
Dept Hd OR Off Manager	1	.2	[a]Asst Pers Director	3	.5	No answer	29	4.8
Dept Hd AND Pers Dept Staff	1	.2	[a]Training Director	23	3.8	No one	63	10.4
Dept Hds OR Pers Director	1	.2	Dir of Safety and Security	1	.2	No one special	8	1.3
Dept Hd(s) AND/OR Supvr(s)	4	.7	Pers Dept Staff	13	2.1			
Dept Hds AND each Atty	1	.2	Pers Dir AND Comptr	1	.2			

[a]Position titles include similar or comparable position titles reported by respondents. See Appendix I for titles that have been designated in this way.

[b]Position titles containing the word AND or the word OR refer to more than one person in charge of training clerical office workers.

[c]See Appendix N for meanings of abbreviations used in this table and in other tables in this chapter.

[d]Percentages refer to the total number of companies completing the mail questionnaire.

The person responsible for training appears not to have access to higher ranks of line management. Respondents most frequently specified that office managers and department heads were in charge of clerical training. The title of office manager was reported by 20.6 per cent of the companies; and the title of department head, by 18.0 per cent. Another 5 per cent of the companies reported either one or both of these particular employees as sharing this responsibility with other supervisory employees. Other personnel frequently reported in charge of training were supervisors and personnel directors, with 9.2 per cent and 8.6 per cent, respectively, of the companies reporting these particular employees. About 7 per cent of the respondents reported that the responsibility for training was shared by two or more employees.

The Dartnell survey (61) agrees in part with these findings. This study found that the person responsible for training the clerical staff was the immediate supervisor or the department head.

In-Company Training Methods

Most of the 606 questionnaire respondents reported using a combination of two or more in-company training methods to train their clerical employees. On-the-job training by supervisor and on-the-job training by fellow employee were the most popular forms of training and were mentioned by 76.4 per cent and 71.1 per cent of the respondents, respectively. On-the-job training by predecessor ranked next in frequency followed by study of company manual (54.5 per cent and 28.9 per cent, respectively). Courses taught on company premises and planned job rotation were mentioned less

frequently (6.8 per cent and 6.6 per cent, respectively). In general, these findings strengthen data reported by Finkelhor (41), Anderson (45), Lewis (52), Speck (53), Coonrad (55), United States Civil Service Commission (58), and Dartnell (61).

Some respondents described variations of on-the-job training methods that they were using. A few companies reported that they were using a typists' or stenographic pool to train employees. This training usually was some form of supervised on-the-job training.

One company reported that high school students were employed on a part-time basis and upon completion of school, on a full-time basis. The co-operative method used by schools and industry was not listed in the questionnaire under training practices. The investigation was concerned with formal or informal training methods used in changing the behavioral pattern of regular employees to meet present and future job requirements.

The employment of certain training methods seems to be directly related to the company's clerical size. Table 18 shows that study of company manual and planned job rotation were reported more frequently by companies in the 1,000 and over clerical size category than by companies in other clerical size categories. Approximately 75.0 per cent and 66.7 per cent, respectively, of companies in clerical size category 1,000 and over used these methods compared with 33.3 per cent and 22.2 per cent, respectively, of the companies in clerical size category 500-999.

TABLE 18.--Distribution of Responses to Question Concerning Methods Used to Train Clerical Office Workers by Clerical Size of Office, 1963-1964[a]

("Do you use any of the following methods to train your clerical office workers?")

Method of Training	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	86.5	95.3	98.7	97.1	98.7	100.0	100.0	100.0	100.0	96.9
Study of company manual	24.3	22.4	24.2	36.5	37.2	30.4	33.3	75.0	18.2	28.9
Planned job rotation	5.4	1.2	3.9	5.8	9.0	17.4	22.2	66.7	9.1	6.6
High school adult education courses[b]	. .	. .	1.3	1.0	5.1	8.7	5.6	. .	. .	1.7
College or university evening courses[b]	. .	1.8	1.3	7.7	16.7	21.7	22.2	41.7	. .	6.6
Courses taught on company premises	. .	. .	2.0	2.9	9.0	39.1	61.1	66.7	. .	6.8
On-the-job training by predecessor	35.1	50.6	57.5	48.1	62.8	87.0	61.1	75.0	36.4	54.5
On-the-job training by supervisor	37.8	67.6	75.8	84.6	94.9	87.0	94.4	83.3	72.7	76.4
On-the-job training by fellow employee	48.6	70.6	72.5	64.4	88.5	73.9	77.8	66.7	81.8	71.4
No	10.8	3.0	. .	1.0	. .	. .	. .	. .	. .	1.7
No answer	2.7	1.8	1.3	1.9	1.3	. .	. .	. .	. .	1.5
Total	100.0	100.1	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.1
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 48, for a table that includes number as well as percentage of firms in each clerical size category.

[b]Companies that reported using "High school adult education courses" or "College or university evening courses" also reported using one or more of the other listed training methods. For facility in interpretation of the data, responses to these items have also been included in Tables 23 and 24 concerning the use of outside agencies or facilities for training.

However, it should be noted that a company manual may be considered by one company to be a sheet of instructions and by another company to be a comprehensive job procedural reference. Write-in comments from some of the respondents indicated that a job manual was considered to be a job description; a manual for selected areas, jobs, or purposes; a guide for the office manager; a list of written instructions; a duty list; a guide to policy matters; a manual published by a trade association; a programmed manual of procedures; a systems and procedures reference; an orientation reference; or a reference for employees being promoted.

The practice of conducting courses on company premises also appears to be directly related to a company's clerical size. This method is discussed more fully in the next section of this chapter.

A tabulation of these replies according to industrial classification also shows some variations. The nature of these variations is indicated in Table 19. The most popular form of training in most industries was some combination of on-the-job training by supervisor, fellow employee, and/or predecessor. Next in frequency in all industries but agriculture was study of company manual. The other training methods were used by only some of the industries and then by only a few companies within these industries. No further analysis of types of training methods according to industry classification was undertaken.

TABLE 19.--Distribution of Responses to Question Concerning Methods Used to Train Clerical Office Workers by Industrial Classification, 1963-1964

("Do you use any of the following methods to train your clerical office workers?")

Method of Training	Industrial Classification									
	Agric[c]	Mining	Constr	Manuf	Utls[d]	Whsle Trade	Retail Trade	Finance[e]	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	100.0	100.0	66.7	97.1	100.0	97.3	100.0	98.6	91.3	96.9
Study of company manual	. .	50.0	8.3	28.4	31.0	20.3	16.1	35.2	45.7	28.9
Planned job rotation	. .	. .	. .	5.8	3.4	. .	3.6	13.4	8.7	6.6
High school adult educ courses[b]	50.0	. .	. .	3.3	. .	. .	. .	.7	. .	1.7
College or univ evening courses[b]	50.0	50.0	. .	7.8	. .	. .	5.4	7.7	10.9	6.6
Courses taught on company premises	. .	. .	. .	3.3	10.3	1.4	7.1	14.1	10.9	6.8
On-the-job training by predecessor	. .	50.0	25.0	62.1	48.3	56.8	53.6	47.2	47.8	54.5
On-the-job training by supervisor	100.0	100.0	41.7	75.7	79.3	73.0	85.7	78.2	73.9	76.4
On-the-job tng by fellow employee	. .	50.0	25.0	76.1	79.3	70.3	69.6	71.8	60.9	71.4
No	. .	. .	25.0	.8	. .	2.7	. .	.7	4.3	1.7
No answer	. .	. .	8.3	2.1	. .	. .	. .	.7	4.3	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	99.9	100.1
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 49, for a table that includes number as well as percentage of firms in each industry category.

[b]Companies that reported using "High school adult education courses" or College or university evening courses" also reported using one or more of the other listed training methods. For facility in interpretation of the data, responses to these items have also been included in Tables 23 and 24 concerning the use of outside agencies or facilities for training.

[c]Agriculture includes forestry and fisheries in this and in other tables classifying companies by industry.

[d]Utilities include transportation and communication in this and in other tables classifying companies by industry.

[e]Finance includes insurance and real estate in this and in other tables classifying companies by industry.

Company Courses or Formal Training Programs

A closer analysis was made of the training method listed in Tables 18 and 19 as "company courses." This method is also referred to as formal training, formal training practices, or formal training programs.[5]

Part B of Table 20 shows that formal training practices were being used by nearly one-third (31.6 per cent) of the companies in the 1,000 and over total employee size category. On the other hand, programs were being conducted in no more than 6 per cent of the companies in each of the other size categories, with none being conducted in companies employing fewer than 20 employees.

Part C of this table also shows that the proportion of companies with programs rose sharply when the 1,000 and over size category was reached. Of the companies with programs, 61.0 per cent were in this size category; yet these companies represented less than 13 per cent of the total number of companies in the sample.

These findings agree with those of Brophy's (49) who found that programs for clerical and accounting workers were provided mainly in those companies employing more than 2,000 total employees. These findings also agree with those of Cutler's (48) to the extent that the prevalence of formal training programs increases with the number of total employees in a company.

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[5]For this discussion, data from 39 other respondents that replied by telephone call, incomplete questionnaire, or letter about the existence or nonexistence of training programs were added to data supplied by the 606 questionnaire respondents. It was assumed that in this instance the use of joint approaches to obtain this information would give much the same response irrespective of which approach was tried on a respondent. See Appendix G, Table 45, for distribution of these 645 companies classified by industry and by size of office.

TABLE 20.--Formal Training Programs of 645 Companies by Size of Company

Size of Company	Formal Program	No Formal Program	Total
	A. Number of Companies		
1-3	0	4	4
4-19	0	63	63
20-49	2	77	79
50-99	1	91	92
100-249	3	148	151
250-499	7	110	117
500-999	3	57	60
1,000 and over	25	54	79
Total	41	604	645
	B. Per Cent of Total Companies in Given Size Category		
1-3	0.0	100.0	100.0
4-19	0.0	100.0	100.0
20-49	2.5	97.5	100.0
50-99	1.1	98.9	100.0
100-249	2.0	98.0	100.0
250-499	6.0	94.0	100.0
500-999	5.0	95.0	100.0
1,000 and over	31.6	68.4	100.0
Total	6.4	93.6	100.0
	C. Per Cent of Total Companies With or Without Programs		
1-3	0.0	.7	.6
4-19	0.0	10.4	9.8
20-49	4.9	12.7	12.2
50-99	2.4	15.1	14.3
100-249	7.3	24.5	23.4
250-499	17.1	18.2	18.1
500-999	7.3	9.4	9.3
1,000 and over	61.0	8.9	12.2
Total	100.0	99.9	99.9

The practice of conducting formal training programs also appears to be related to a company's clerical size. This training method seems to be more popular with companies employing 250 and over clerical employees. Part B of Table 21 shows that the proportion of companies with programs in each clerical size category rose with the size of the clerical force. These findings, in general, agree with those of studies by Speck (53), Mandell (56), and Harrison (58). In this study, programs were conducted in less than 9 per cent of the companies in each of the clerical size categories under 250, whereas they were conducted in at least 39 per cent of the companies in clerical size categories 250 and over. This percentage increases to 61.1 per cent for clerical size category 500-999 and to 66.7 per cent for clerical size category 1,000 and over. No programs were being conducted by companies with fewer than 20 clerical employees.

Part C of this table shows that 68.3 per cent of the companies with programs employed 250 and over clerical employees, whereas 94.9 per cent of the companies without programs employed under 250 clerical employees.

The use of formal training practices also seems to vary among industries. Examination of Part C of Table 22 shows that nearly one-half of the companies with programs were from the finance, insurance, and real estate industry and that one-fifth were from the manufacturing industry. The other companies with programs were scattered among four industries. The two industries that reported companies with the largest number of training programs, finance, insurance, and real estate, and manufacturing, also contained the

TABLE 21.--Formal Training Programs of 645 Companies by Size of Office

Size of Office	Formal Program	No Formal Program	Total
	A. Number of Companies		
1-3	0	45	45
4-19	0	191	191
20-49	3	154	157
50-99	3	101	104
100-249	7	77	84
250-499	9	14	23
500-999	11	7	18
1,000 and over	8	4	12
No ans re size	0	11	11
Total	41	604	645
	B. Per Cent of Total Companies in Given Size Category		
1-3	0.0	100.0	100.0
4-19	0.0	100.0	100.0
20-49	1.9	98.1	100.0
50-99	2.9	97.1	100.0
100-249	8.3	91.7	100.0
250-499	39.1	60.9	100.0
500-999	61.1	38.9	100.0
1,000 and over	66.7	33.3	100.0
No ans re size	0.0	100.0	100.0
Total	6.4	93.6	100.0
	C. Per Cent of Total Companies With or Without Programs		
1-3	0.0	7.5	7.0
4-19	0.0	31.6	29.6
20-49	7.3	25.5	24.3
50-99	7.3	16.7	16.1
100-249	17.1	12.7	13.0
250-499	22.0	2.3	3.6
500-999	26.8	1.2	2.8
1,000 and over	19.5	.7	1.9
No ans re size	0.0	1.8	1.7
Total	100.0	100.0	100.0

TABLE 22.--Formal Training Programs of 645 Companies by Industrial Classification

Industrial Classification	Formal Program	No Formal Program	Total
	A. Number of Companies		
Agriculture	0	2	2
Mining	0	2	2
Construction	0	12	12
Manufacturing	8	246	254
Utilities	3	26	29
Wholesale Trade	1	89	90
Retail Trade	4	56	60
Finance	20	123	143
Services	5	48	53
Total	41	604	645
B. Per Cent of Total Companies in Given Industrial Classification			
Agriculture	0.0	100.0	100.0
Mining	0.0	100.0	100.0
Construction	0.0	100.0	100.0
Manufacturing	3.1	96.9	100.0
Utilities	10.3	89.7	100.0
Wholesale Trade	1.1	98.9	100.0
Retail Trade	6.7	93.3	100.0
Finance	14.0	86.0	100.0
Services	9.4	90.6	100.0
Total	6.4	93.6	100.0
C. Per Cent of Total Companies With or Without Programs			
Agriculture	0.0	.3	.3
Mining	0.0	.3	.3
Construction	0.0	2.0	1.9
Manufacturing	19.5	40.7	39.4
Utilities	7.3	4.3	4.5
Wholesale Trade	2.4	14.7	14.0
Retail Trade	9.8	9.3	9.3
Finance	48.8	20.4	22.2
Services	12.2	7.9	8.2
Total	100.0	99.9	100.1

majority (64.2 per cent) of those companies employing 250 and over clerical employees.

Examination of the proportion of companies within each industry that were conducting programs shows a slightly different picture. Companies in nonmanufacturing industries, especially those in finance, utilities, and services, were more likely to conduct formal training for clerical employees than those companies in manufacturing industries. However, these findings should be examined with caution. In some industries clerical employees represent a large percentage of the total employee size; and in other industries, a small percentage. Furthermore, in some industries, companies do not tend to grow to the size that companies in other industries may grow; for example, companies in wholesale trade do not attain the size that some companies in finance, insurance, and real estate attain.

Previous studies that were specifically concerned with investigating clerical training did not tabulate companies with training by industry. Studies that were concerned with training programs for all categories of company employees showed varied findings. The study by the United States Bureau of Apprenticeship and Training (62) confirmed these findings to the extent that training for all company employees tends to be found in service industries rather than in goods-producing ones. Cutler (48) related the existence of training programs only to a company's total size and did not include industrial classification. Clark and Sloan (58) found no correlation between particular industries and the existence of educational programs. However, this study was based upon training practices in the 500 largest corporations

in the United States, with most of these corporations conducting programs.

Further Analysis of Formal Training Method

An attempt was also made to ascertain by chi-square analysis the existence of any relationship between certain variables and the use of this training method. Major variables that could potentially affect the use of formal training practices were considered to be (1) total size of company, (2) clerical size of company, and (3) type of business.

The following null hypotheses concerning the use of formal training practices and the variable "company size" were formulated and tested:

1. No significant relationship exists between the use of formal training practices by companies employing under 250 total employees as compared with those employing 250 and over total employees.

2. No significant relationship exists between the use of formal training practices by companies employing under 500 total employees as compared with those employing 500 and over total employees.

The following null hypotheses concerning the use of formal training practices and the variable "clerical employee size" were formulated and tested:

3. No significant relationship exists between the use of formal training practices by companies employing under 250 clerical employees as compared with those employing 250 and over clerical employees.

4. No significant relationship exists between the use of formal training practices by companies employing under 500 clerical employees as compared with those employing 500 and over clerical employees.

The following null hypothesis concerning the use of formal training practices and the variable "type of company" was formulated and tested:

5. No significant relationship exists between the use of formal training practices and type of company.

The results of chi-square analysis for the above null hypotheses were found to be significant beyond the 5 per cent probability level.[6] Therefore, these null hypotheses were rejected. This infers that the use of formal training practices is related (1) to companies employing 250 and over total employees, (2) to companies employing 250 and over clerical employees, and (3) to type of company. No further analysis concerning the relationship of these variables to the use of formal training practices was undertaken due to the small number of companies conducting training programs and its effect upon any analysis.

Outside Agencies

Training provided by outside agencies can be an essential or a supplementary part of a company's training program. Of the 606 respondents, 29.9 per cent reported utilizing outside agencies in training clerical employees. Approximately 68.2 per cent of the respondents said they did not utilize such agencies.

All respondents that reported utilizing outside training agencies also reported using one or more of the in-company training

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[6]See Appendix M for computation of chi-square analysis for each of these null hypotheses.

methods listed in Tables 18 and 19. Outside agencies that were mentioned by respondents were equipment suppliers, industry-sponsored courses, outside secretarial seminars, noncompany consultants, noncompany instructors, special arrangements with business schools, high school adult education courses, and college or university evening courses.

Equipment suppliers were used by most of the respondents that reported using outside agencies. They were mentioned by 21.5 per cent of the responding companies. Other outside agencies were each reported by less than 7 per cent of the respondents.

These over-all figures mask to some extent the variations that exist when responses are examined by clerical size or by industrial classification. Table 23 shows that the employment of these outside agencies tends to increase as the clerical size of the company increases. Less than 53 per cent of the companies in each of the clerical size categories under 500 used outside agencies, ranging from 2.7 per cent of the companies in clerical size category 1-3 to 52.2 per cent of the companies in clerical size category 250-499. On the other hand, the majority of companies in clerical size categories 500 and over used these agencies: 77.8 per cent of the companies in clerical size category 500-999 and 83.3 per cent of the companies in clerical size category 1,000 and over.

In general, these findings are similar to those reported by Clark and Sloan (58) and by Serbein (61). In the former study, most of the 500 largest industrial corporations in the United States were found to carry on out-of-company programs; in the latter study,

TABLE 23.--Distribution of Responses to Question Concerning Outside Agencies Used to Train Clerical Office Workers by Clerical Size of Office, 1963-1964[a]

("Do you employ any outside facilities, other than those previously mentioned, for training your clerical office workers?")

Outside Agency[b]	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	2.7	18.2	28.7	34.6	41.0	52.2	77.8	83.3	9.1	29.9
Equipment suppliers	2.7	15.8	24.2	26.0	20.5	39.1	38.9	41.7	9.1	21.5
Industry-sponsored courses	..	.6	3.9	3.8	2.6	8.7	5.6	8.3	..	2.8
Outside secretarial seminars	..	.6	.7	2.9	2.6	8.7	5.6	..	..	1.7
Noncompany consultants	..	..	1.3	..	..	..	5.6	..	..	.5
Noncompany instructors	..	..	1.3	1.0	9.0	17.4	27.8	8.3	9.1	3.5
Special arrangements with business schools	..	..	..	..	2.6	8.7	..	..	..	.7
High school adult education courses[c]	..	..	1.3	1.0	5.1	8.7	5.6	..	..	1.7
College or university evening courses[c]	..	1.8	1.3	7.7	16.7	21.7	22.2	41.7	..	6.6
No	91.9	80.0	69.9	63.5	56.4	47.8	22.2	16.7	81.8	68.2
No answer	5.4	1.8	1.3	1.0	1.3	..	..	..	9.1	1.7
Does not apply[d]	..	..	..	1.0	1.3	..	..	..	..	.3
Total	100.0	100.0	99.9	100.1	100.0	100.0	100.0	100.0	100.0	100.1
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 50, for a table that includes number as well as percentage of firms in each clerical size category.

[b]All companies that reported using one or more outside agencies or facilities also reported using one or more of the training methods listed in Tables 18 and 19.

[c]Responses to the question concerning methods of training used to train clerical office workers that were identified as outside agencies such as "High school adult education courses" and "College or university evening courses" have been included in this table to facilitate interpretation of the data.

[d]The expression "Does not apply" is used in this table and in other tables in this chapter to denote those companies that indicated that the question did not apply to their situation.

large companies were found to make the greatest use of out-of-company training and education. The fact that out-of-company agencies were more apt to be used by companies with large clerical forces may indicate that such companies tend to be more aware of a need for training but find that it is more convenient and economical to have others conduct certain training for them.

Table 24 shows the types of companies employing outside agencies. Companies classified as agriculture and mining did not use any of these agencies. In each of the other industries, equipment suppliers were used most often. Only two industries reported companies using industry-sponsored courses. Other outside agencies showed some variations between industries.

Further examination of questionnaire replies reveals the nature of these agencies. Equipment suppliers included manufacturers and suppliers of office equipment, such as International Business Machines Corporation and New England Telephone and Telegraph Company. No distinction was made between those firms listing one manufacturer and those listing more than one manufacturer in reporting frequency of responses.

Industry-sponsored courses were reported by companies in two industries, manufacturing and finance, insurance, and real estate. Two manufacturing companies reported using correspondence courses provided by their industry. Five banking firms reported using the American Institute of Banking and/or the Savings Banks Association of Massachusetts, and another five reported sending employees to larger

TABLE 24.--Distribution of Responses to Question Concerning Outside Agencies Used to Train Clerical Office Workers by Clerical Size of Office, 1963-1964[a]

("Do you employ any outside facilities, other than those previously mentioned, for training your clerical office workers?")

Outside Agency[b]	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	50.0	8.3	33.3	20.7	23.0	23.2	31.7	34.8	29.9
Equipment suppliers	. .	. .	8.3	24.3	17.2	23.0	12.5	20.4	26.1	21.5
Industry-sponsored courses	. .	. .	. .	.8	. .	. .	. .	7.0	. .	2.8
Outside secretarial seminars	. .	. .	. .	1.6	3.4	2.7	1.8	. .	4.3	1.7
Noncompany consultants	. .	. .	. .	. .	. .	1.4	1.8	. .	2.2	.5
Noncompany instructors	. .	. .	. .	2.5	. .	. .	5.4	4.2	10.9	3.5
Special arrangements with business schools	. .	. .	. .	.8	. .	. .	1.8	.7	. .	.7
High school adult education courses[c]	50.0	. .	. .	3.3	. .	. .	. .	.7	. .	1.7
College or university evening courses[c]	50.0	50.0	. .	7.8	. .	. .	5.4	7.7	10.9	6.6
No	50.0	. .	83.3	64.6	79.3	75.7	76.8	68.3	56.5	68.1
No answer	. .	50.0	. .	1.6	. .	1.4	. .	. .	8.7	1.7
Does not apply	. .	. .	8.3	.4	. .	. .	. .	. .	. .	.3
Total	100.0	100.0	99.9	99.9	100.0	100.1	100.0	100.0	100.0	100.0
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 51, for a table that includes number as well as percentage of firms in each industry category.

[b]All companies that reported using one or more outside agencies or facilities also reported using one or more of the training methods listed in Tables 18 and 19.

[c]Responses to the question concerning methods of training used to train clerical office workers that were identified as outside agencies or facilities such as "High school adult education courses" and "College or university evening courses" have been included in this table to facilitate interpretation of the data.

or correspondent banks. Five insurance firms reported sending employees to the Insurance Institute conducted by Boston University.

Secretarial seminars that were specifically mentioned were those sponsored by the National Secretaries' Association and the Center for Continuing Education at Northeastern University; Newton and Waltham Chambers of Commerce; Katharine Gibbs School; and Mary Markulin, Training Consultant. Of three companies employing noncompany consultants, only one supplied details. This company reported conferring with a college instructor in order to institute its own secretarial seminar.

Companies that reported bringing in instructors from outside the company most often mentioned employing guest speakers to talk on various facets of the secretarial function. Others mentioned were business education teachers, comptometer instructors, liberal arts teachers, and a handwriting expert. All but one of these companies employed fewer than 1,000 clerical employees. This suggests that companies employing large numbers of clerical employees may prefer to employ instructors from within the company.

Special arrangements with business schools involved sending clerical employees to school for instruction in shorthand, typewriting, or comptometer training. Employees were usually sent to school during the day.

Companies reporting high school adult education courses or college or university evening courses provided clerical employees with tuition aid. Various tuition aid practices are discussed more fully later in this chapter.

Optional Training

Very little training conducted within a company or provided by outside agencies was optional for clerical employees. Tables 25 and 26 show that only 7.1 per cent of the respondents indicated that any training was optional. This figure may somewhat underestimate the amount of optional training since 53.1 per cent of the respondents did not answer this question.

Tuition Aid

Companies provided tuition refund programs for various reasons. These programs may serve, for example, to supplement in-company training, to provide a means of keeping employees up to date, or to help prepare employees for job promotion. As shown in Tables 27 and 28, 37.8 per cent of the respondents reported that they provided their clerical employees with tuition aid, whereas 60.2 per cent reported that they did not.

Some of the companies not providing tuition aid included comments explaining their responses. Respondents most frequently mentioned that the need for aid had not arisen. Other comments included by respondents were in essence: "prefer to hire with the necessary skills," "can't get training in school," "aid only to higher employee categories," "want to encourage employees to take courses on their own," "they do not stay long," "prefer making a grant to the school employees attend," "schools not able to teach our work," "take courses and leave when courses are completed," "profit squeeze on," and "might consider paying tuition for preparation for a new job."

TABLE 25.--Distribution of Responses to Question Concerning Training Considered Optional for Clerical Office Workers by Clerical Size of Office, 1963-1964[a]

("Is any of this training optional for your clerical office workers?")

Optional Training	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	..	1.8	3.3	2.9	15.4	21.7	44.4	41.7	18.2	7.1
High school adult education courses	..	..	.7	..	..	..	..	..	..	.2
College or university evening courses	..	1.8	1.3	1.9	9.0	17.4	16.7	25.0	18.2	4.3
Courses taught on company premises	..	..	..	..	2.6	..	22.2	8.3	..	1.2
Equipment suppliers	..	..	.7	..	5.1	..	..	..	..	.8
American Institute of Banking	..	..	..	..	..	4.3	..	..	..	.2
Arrangements with business schools	..	..	..	..	1.3	..	..	..	..	.2
Spare-time training[b]	..	..	..	1.0	..	..	..	..	..	.2
On-the-job training for promotion	..	..	..	..	1.3	..	..	..	..	.2
Did not specify	..	..	1.3	..	2.6	..	16.7	8.3	18.2	1.7
No	32.4	35.9	39.2	46.2	35.9	47.8	27.8	41.7	27.3	38.4
No answer	67.6	61.8	56.9	49.0	44.9	26.1	27.8	16.7	54.5	53.1
Does not apply	..	.6	.7	1.9	3.9	4.3	..	..	..	1.3
Total	100.0	100.1	100.1	100.0	100.1	99.9	100.0	100.1	100.0	99.9
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 52, for a table that includes number as well as percentage of firms in each clerical size category.

[b]Clerical office workers learn other clerical jobs whenever work load lightens.

TABLE 26.--Distribution of Responses to Question Concerning Training Considered Optional for Clerical Office Workers by Industrial Classification, 1963-1964[a]

("Is any of this training optional for your clerical office workers?")

Optional Training	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	50.0	..	8.6	..	..	8.9	7.7	8.7	7.1
High school adult education courses	50.0	..	..	..	..	..	..	..	..	.2
College or university evening courses	50.0	50.0	..	6.2	..	..	5.4	2.8	4.3	4.3
Courses taught on company premises	..	..	..	1.6	..	..	1.8	1.4	..	1.2
Equipment suppliers	..	..	..	2.1	..	..	..	..	..	.8
American Institute of Banking	..	..	..	..	..	..	..	.7	..	.2
Arrangements with business schools	..	..	..	..	..	..	..	.7		.2
Spare-time training[b]	..	..	..	..	..	..	..	..	2.2	.2
On-the-job training for promotion	..	..	..	..	..	..	1.8	..	..	.2
Did not specify	..	..	..	2.1	..	..	1.8	2.1	2.2	1.7
No	..	..	25.0	32.5	44.8	33.8	28.6	57.0	34.8	38.4
No answer	50.0	50.0	66.7	58.0	55.2	63.5	58.9	35.2	54.3	53.1
Does not apply	..	..	8.3	.8	..	2.7	3.6	..	2.2	1.3
Total	100.0	100.0	100.0	99.9	100.0	100.0	100.0	100.0	100.0	99.9
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(57)	(143)	(46)	(606)

[a]See Appendix H, Table 53, for a table that includes number as well as percentage of firms in each industry category.

[b]Clerical office workers learn other clerical jobs whenever work load lightens.

TABLE 27.--Distribution of Responses to Question Concerning Available Tuition Aid Programs for Clerical Office Workers by Clerical Size of Office, 1963-1964[a]

("Do you pay any of the evening school or college course tuition for your clerical office workers?")

Amount of Aid	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	34.7	30.7	47.1	53.8	56.5	44.4	66.7	27.3	37.8	
100 per cent aid	22.9	21.6	26.9	21.8	13.0	22.2	41.7	9.1	21.5	
85 per cent aid	. .	. .	. .	1.3	. .	. .	. .	. .	.2	
80 per cent aid	. .	. .	1.0	. .	. .	. .	. .	. .	.2	
75 per cent aid	1.2	. .	1.9	3.8	. .	. .	. .	. .	1.2	
50 per cent aid	4.7	2.6	5.8	10.3	13.0	5.6	8.3	9.1	5.3	
Per cent of partial aid not specified	4.1	4.6	6.7	6.4	13.0	5.6	8.3	. .	5.1	
Full aid only up to a certain amount	. .	.7	1.9	2.5	. .	11.1	8.3	. .	1.3	
Partial aid only up to a certain amount	. .	.7	1.0	. .	. .	. .	. .	. .	.3	
Amount of aid depends on relation of course to job	. .	. .	1.9	1.3	4.3	. .	. .	. .	.7	
Amount of aid depends on person requesting course	. .	.7	. .	1.3	8.7	. .	. .	. .	.7	
Amount of aid depends on grades	1.2	. .	. .	5.1	4.3	. .	. .	. .	1.2	
Amount of aid depends on merit and need	.6	. .	. .	. .	. .	. .	. .	9.1	.3	
Tuition aid program being planned	. .	.7	. .	1.3	. .	5.6	. .	. .	.5	
No	91.9	64.7	68.0	51.9	44.9	43.5	50.0	33.3	45.5	60.2
No answer to entire question	8.1	.6	.7	1.0	. .	. .	. .	. .	27.3	1.5
Total	100.0	100.0	100.1	100.0	100.0	100.0	100.0	100.0	100.1	100.0
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

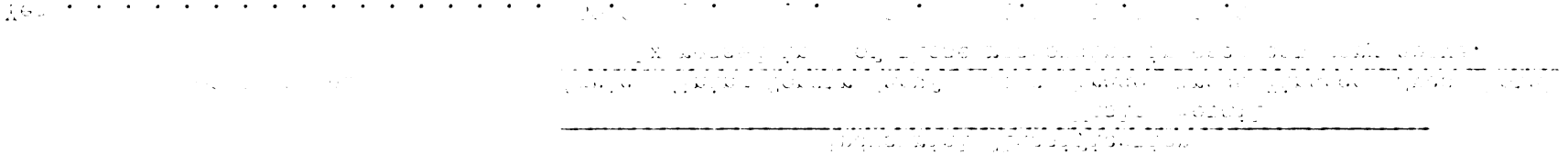
[a]See Appendix H, Table 54, for a table that includes number as well as percentage of firms in each clerical size category.

TABLE 28.--Distribution of Responses to Question Concerning Available Tuition Aid Programs for Clerical Office Workers by Industrial Classification, 1963-1964[a]

("Do you pay any of the evening school or college course tuition for your clerical office workers?")

Amount of Aid	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	..	..	34.2	41.4	16.2	17.9	70.4	23.9	37.8
100 per cent aid	..	..	..	11.1	10.3	9.5	10.7	59.2	6.5	21.5
85 per cent aid	..	..	..	.4	..	..	..	..	..	.2
80 per cent aid	..	..	..	..	..	..	..	..	2.2	.2
75 per cent aid	..	..	..	2.5	..	..	..	..	2.2	1.2
50 per cent aid	50.0	..	..	5.8	24.1	2.7	..	3.5	6.5	5.3
Per cent of partial aid not specified	..	..	..	6.2	6.9	4.1	3.6	4.2	6.5	5.1
Full aid only up to a certain amount	..	..	..	3.3	..	..	..	..	..	1.3
Partial aid only up to a certain amount	..	..	..	.8	..	..	..	..	..	.3
Amount of aid depends on relation of course to job	..	..	..	.4	..	..	1.8	1.4	..	.7
Amount of aid depends on person requesting course	..	..	..	1.2	..	..	..	.7	..	.7
Amount of aid depends on grades	..	..	..	2.1	..	..	1.8	.7	..	1.2
Amount of aid depends on merit and need	..	..	..	.4	..	..	..	.7	..	.3
Tuition aid program being planned	..	..	..	.4	..	..	..	.7	2.2	.5
No	50.0	50.0	100.0	63.4	58.6	81.1	82.1	28.9	71.7	60.2
No answer to entire question	..	50.0	..	2.1	..	2.7	..	..	2.2	1.5
Total	100.0	100.0	100.0	100.1	100.0	100.0	100.0	100.0	100.0	100.0
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 55, for a table that includes number as well as percentage of firms in each industry category.



Some companies reported loaning employees a limited amount of money each semester toward the cost of approved courses. Loans, usually without interest charges, were repaid through payroll deductions. These plans were not considered to be within the strict definition of tuition refund programs. However, two of the companies reported as case studies permitted employees to borrow tuition money. These plans are described in Volume II, Cases G and M.

As shown in Table 27, the percentage of companies providing tuition aid tends to increase as the clerical size category increases. These findings, in general, were confirmed by other studies. Studies by Anderson (45) and by Clark and Sloan (58) concerning training practices of the largest corporations in the United States found that the majority of companies defray tuition expenses partially or completely. Studies by Serbein (61) and by the United States Bureau of Apprenticeship and Training (62) found that the use of tuition aid was directly related to size of company. Data provided by Stahl (60) and by Sandoz (61) also indicated that companies frequently provide tuition aid but did not specify whether the use of tuition aid was related to a company's employee size.

Tuition aid programs also appear to be more common among certain types of companies, as shown in Table 28. Aid is provided by 70.4 per cent of the companies classified as finance, insurance, and real estate, by 41.4 per cent classified as transportation, communication, and utilities, and by 34.2 per cent classified as manufacturing. The percentage of companies in other industry categories that were providing aid was not high.

Amount of Tuition Aid

As shown in Tables 27 and 28, 21.5 per cent of the respondents provided full aid; 12.0 per cent, partial aid; and 4.5 per cent, a limited amount of full or partial aid. Stated in another way, these figures represent about 57 per cent, 30 per cent, and 10 per cent, respectively, of those companies providing aid. Explanatory notes on 41 questionnaires pointed out that the amount of partial aid varied from 50 to 85 per cent. A few companies also reported that they provided an allowance for supper and/or books and other supplies. More companies may provide such allowances, but the inquiry was not worded to elicit this response.

Type of Course for Tuition Aid

Restrictions on the type of course that a clerical employee may take for reimbursement were reported by 30.5 per cent of the responding companies. This figure represents about 80 per cent of those companies providing aid.

The nature of these restrictions varied to some extent among companies, although generally a company required that the course be related in some way to an employee's present or future job. The tabulation of course restrictions varied to some extent with clerical employee size category and with industrial classification, as shown in Tables 29 and 30, respectively. The most noticeable variation was that 34 of the 41 companies reporting no course restrictions were finance, insurance, and real estate organizations. This may reflect the fact that companies in this category frequently send their employees to out-of-company training agencies created solely

TABLE 29.--Distribution of Responses to Question Concerning Type of Course Clerical Office Workers May Take to Receive Reimbursement by Clerical Size of Office, 1963-1964[a]

("Do you specify what type course the clerical office worker can take in order to receive reimbursement?")

Type of Subjects	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	24.7	23.5	40.4	48.7	47.8	44.4	50.0	18.2	30.5	
Did not describe	2.4	2.0	2.9	1.3	8.7	..	8.3	..	2.3	
Subjects related to job	20.2	14.4	31.7	33.3	21.7	33.3	25.0	18.2	21.6	
Subjects related to job or leading to a degree	..	..	1.0	2.6	4.3	5.6	..	..	.8	
American Institute of Bkg subjects	1.8	2.6	..	2.6	..	..	..	..	1.5	
Bus subjects or leading to a degree	..	..	1.0	1.3	..	..	..	..	.3	
Insurance courses	..	1.3	..	..	..	5.6	8.3	..	.7	
Special courses	.6	2.0	..	..	4.3	..	..	..	.8	
Approved by management prior to registration	..	.7	1.9	2.6	8.7	..	8.3	..	1.3	
Determined by company's need for tng	..	..	1.0	1.3	..	..	..	..	.3	
Determined by company's need for tng and by employee potential	..	.7	..	1.3	..	..	..	..	.3	
Determined on individual basis	..	..	1.0	..	..	..	..	..	.2	
Advantageous to company	..	..	..	2.6	..	..	..	..	.3	
No	9.4	6.5	6.7	5.1	8.7	..	16.7	..	6.8	
No ans to this part of question	.6	.7	..	..	..	..	..	9.1	.5	
Tuition aid program being planned	..	.7	..	1.3	..	5.6	..	..	.5	
Does not apply (provides no aid)	91.9	64.7	68.0	51.9	44.9	43.5	50.0	33.3	45.5	60.2
No answer to entire question	8.1	.6	.7	1.0	..	..	..	..	27.3	1.5
Total	100.0	100.0	100.1	100.2	100.0	99.9	100.0	100.0	100.1	100.0
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 56, for a table that includes number as well as percentage of firms in each clerical size category.

TABLE 30.--Distribution of Responses to Question Concerning Type of Course Clerical Office Workers May Take to Receive Reimbursement by Industrial Classification, 1963-1964[a]

("Do you specify what type course the clerical office worker can take in order to receive reimbursement?")

Type of Subjects	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	. .	. .	31.7	41.4	14.9	17.9	45.1	21.7	30.5
Did not describe	. .	. .	. .	.8	. .	2.7	3.6	4.9	2.2	2.3
Subjects related to job	50.0	. .	. .	25.5	34.5	12.2	10.7	26.8	10.9	21.6
Subjects related to job or leading to a degree	. .	. .	. .	1.2	. .	. .	. .	1.4	. .	.8
American Institute of Bkg subjects	. .	. .	. .	. .	. .	. .	. .	6.3	. .	1.5
Bus subjects or leading to a degree	. .	. .	. .	. .	. .	. .	. .	1.4	. .	.3
Insurance courses	. .	. .	. .	. .	. .	. .	. .	2.8	. .	.7
Special courses	. .	. .	. .	.4	3.4	. .	1.8	. .	4.4	.8
Approved by management prior to registration	. .	. .	. .	1.6	3.4	. .	. .	1.4	2.2	1.3
Determined by company's need for tng	. .	. .	. .	.8	. .	. .	. .	. .	. .	.3
Determined by company's need for tng and by employee potential	. .	. .	. .	.8	. .	. .	. .	. .	. .	.3
Determined on individual basis	. .	. .	. .	. .	. .	. .	. .	. .	2.2	.2
Advantageous to company	. .	. .	. .	.4	. .	. .	1.8	. .	. .	.3
No	. .	. .	. .	2.1	. .	1.4	. .	24.0	2.2	6.8
No ans to this part of the question	. .	. .	. .	.4	. .	. .	. .	1.4	. .	.5
Tuition aid program being planned	. .	. .	. .	.4	. .	. .	. .	.7	2.2	.5
Does not apply (provides no aid)	50.0	50.0	100.0	63.4	58.6	81.1	82.1	28.9	71.7	60.2
No answer to entire question	. .	50.0	. .	2.1	. .	2.7	. .	. .	2.2	1.5
Total	100.0	100.0	100.0	100.1	100.0	100.1	100.0	100.1	100.0	99.9
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 57, for a table that includes number as well as percentage of firms in each industry category.

for their type of business, such as the American Institute of Banking, the Savings Banks Association of Massachusetts, and the Insurance Institute of Boston University. Moreover, these outside agencies designate the employee categories that are eligible to attend each course. This screening process tends to make it unnecessary for companies to specify the type of course an employee may take for aid.

Approved Institutions for Tuition Aid

Approximately 16.1 per cent of the responding companies placed some restriction upon the selection of the collegiate institution that clerical employees may attend for tuition aid. This figure represents about 43 per cent of those companies providing aid.

Tables 31 and 32 show the nature of these restrictions classified by clerical employee size and by industry, respectively. Companies typically named a particular institution or specified that the institution be accredited. Sixty of the 98 companies reporting restrictions were banking institutions, with 51 of them mentioning the American Institute of Banking in particular. The specially designed course offerings and course admission policies set forth by the American Institute of Banking make it possible for banks to eliminate course and other restrictions for tuition aid when specifying that employees attend this institution.

Satisfactory Course Completion Required for Refund

Satisfactory course completion was necessary for reimbursement in 26.6 per cent of the responding companies. This figure represents about 70 per cent of those companies providing aid.

TABLE 31.--Distribution of Responses to Question Concerning Collegiate Institutions That Clerical Office Workers May Attend for Tuition Aid by Clerical Size of Office, 1963-1964[a]

("Do you specify what collegiate institutions the clerical office workers may attend?")

Type of Institutions	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes		16.5	15.7	14.4	21.8	17.4	22.2	50.0		16.1
Did not describe		1.8	3.3	1.9	3.8			8.3		2.3
Only accredited institutions		.6	1.3	2.9	6.4	4.3	16.7	16.7		2.8
American Institute of Banking		10.0	7.2	4.8	5.1	8.7		16.7		6.8
American Institute of Banking or Savings Banks Association of Mass			1.3	1.0						.5
American Institute of Banking or other approved institutions		1.8	1.3		2.6					1.2
Specific institution		.6	.7		2.6	4.3				.8
Approved by management		1.2	.7	2.9			5.6	8.3		1.3
Accredited institutions and correspondent schools				1.0	1.3					.3
Limited to Boston area		.6								.2
No		17.6	15.0	32.7	32.0	39.1	22.2	16.7	18.2	21.3
No answer to this part of question		.6							9.1	.3
Tuition aid program being planned			.7		1.3		5.6			.5
Does not apply (provides no aid)	91.9	64.7	68.0	51.9	44.9	43.5	50.0	33.3	45.5	60.2
No answer to entire question	8.1	.6	.7	1.0					27.3	1.5
Total	100.0	100.0	100.1	100.0	100.0	100.0	100.0	100.1	100.1	99.9
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 58, for a table that includes number as well as percentage of firms in each clerical size category.

TABLE 32.--Distribution of Responses to Question Concerning Collegiate Institutions That Clerical Office Workers May Attend for Tuition Aid by Industrial Classification, 1963-1964[a]

("Do you specify what collegiate institutions the clerical office workers may attend?")

Type of Institutions	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	. .	. .	. .	8.2	20.7	4.1	10.7	42.3	6.5	16.1
Did not describe	. .	. .	. .	1.2	. .	1.4	5.4	4.2	2.2	2.3
Only accredited institutions	. .	. .	. .	5.3	10.3	. .	. .	. .	2.2	2.8
American Institute of Banking	. .	. .	. .	. .	. .	. .	. .	28.9	. .	6.8
American Institute of Banking or Savings Banks Association of Mass	. .	. .	. .	. .	. .	. .	. .	2.1	. .	.5
American Institute of Banking or other approved institutions	. .	. .	. .	. .	. .	. .	. .	4.9	. .	1.2
Specific institution	. .	. .	. .	.4	3.4	. .	3.6	.7	. .	.8
Approved by management	. .	. .	. .	1.2	3.4	1.4	1.8	1.4	. .	1.3
Accredited institutions and correspondent schools	. .	. .	. .	. .	3.4	. .	. .	. .	2.2	.3
Limited to Boston area	. .	. .	. .	. .	. .	1.4	. .	. .	. .	.2
No	50.0	. .	. .	25.5	20.7	10.8	7.1	28.2	17.4	21.3
No answer to this part of question	. .	. .	. .	.4	. .	1.4	. .	. .	. .	.3
Tuition aid program being planned	. .	. .	. .	.4	. .	. .	. .	.7	2.2	.5
Does not apply (provides no aid)	50.0	50.0	100.0	63.4	58.6	81.1	82.1	28.9	71.7	60.2
No answer to entire question	. .	50.0	. .	2.1	. .	2.7	. .	. .	2.2	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.1	99.9	100.1	100.0	100.0
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 59, for a table that includes number as well as percentage of firms in each industry category.

Table 33 classified these replies according to size of clerical force. Only companies employing under 500 clerical employees said that they did not require satisfactory course completion for tuition refund. Table 34 indicates that the majority of companies providing aid in each industry did require course completion. Most of the companies that did not require satisfactory course completion for tuition aid were classified as finance, insurance, and real estate companies or manufacturing companies.

Length of Employment Requirement

Clerical employees were required to have some company longevity before becoming eligible for tuition reimbursement in 20.0 per cent of the responding companies. This figure represents about 53 per cent of those companies providing aid. The restrictions ranged from a specific time period varying from one month to five years to no set policy.

Companies did not require company longevity for tuition eligibility in 16.7 per cent of the responding companies. This figure represents about 44 per cent of those companies providing aid. Write-in comments from some of these respondents were as follows:

> If they need technical skills, we want them to take the necessary courses.
>
> If employees have enough enthusiasm to attend, we want to encourage them as much as possible.
>
> If they want to better themselves, it is up to them.
>
> New employees need training most.
>
> If they are not interested in bettering themselves, we are not interested in them.

TABLE 33.--Distribution of Responses to Question Concerning Satisfactory Completion of Courses Necessary for Tuition Aid by Clerical Size of Office, 1963-1964[a]

("Do you specify that the course must be satisfactorily completed before the clerical office worker will receive reimbursement for the course?")

Satisfactory Course Completion	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	19.5	19.6	35.6	43.6	39.1	44.4	66.7	18.2	26.6
Satisfactorily completed	17.6	19.0	34.6	35.9	34.8	44.4	66.7	18.2	24.6
B or better	1.2	.7	1.0	1.3	. .	. .	. .	. .	.8
Graded scale	.6	. .	. .	6.4	4.3	. .	. .	. .	1.2
No, only attendance	.6	. .	. .	. .	. .	. .	. .	. .	.2
No, but no further aid given	1.2	.7	1.9	. .	8.7	. .	. .	. .	1.2
No	12.9	9.8	9.6	10.3	8.7	. .	. .	. .	9.4
No answer to this part of question	.6	.7	. .	. .	. .	. .	. .	9.1	.5
Tuition aid program being planned	. .	.7	. .	1.3	. .	5.6	. .	. .	.5
Does not apply (provides no aid)	91.9	64.7	68.0	51.9	44.9	43.5	50.0	33.3	45.5	60.2
No answer to entire question	8.1	.6	.7	1.0	. .	. .	. .	. .	27.3	1.5
Total	100.0	100.1	100.2	100.0	100.1	100.0	100.0	100.0	100.1	100.1
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 60, for a table that includes number as well as percentage of firms in each clerical size category.

TABLE 34.--Distribution of Responses to Question Concerning Satisfactory Completion of Courses Necessary for Tuition Aid by Industrial Classification, 1963-1964[a]

("Do you specify that the course must be satisfactorily completed before the clerical office worker will receive reimbursement for the course?")

Satisfactory Course Completion	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	. .	. .	26.3	38.0	9.5	14.3	43.7	17.4	26.6
Satisfactorily completed	50.0	. .	. .	23.0	38.0	6.8	14.3	42.3	17.4	24.6
B or better	. .	. .	. .	1.2	. .	1.4	. .	.7	. .	.8
Graded scale	. .	. .	. .	2.1	. .	1.4	. .	.7	. .	1.2
No, only attendance	. .	. .	. .	.4	. .	. .	. .	. .	. .	.2
No, but no further aid given	. .	. .	. .	2.1	. .	. .	. .	1.4	. .	1.2
No	. .	. .	. .	4.9	3.4	5.4	3.6	24.6	6.5	9.4
No answer to this part of question	. .	. .	. .	.4	. .	1.4	. .	.7	. .	.5
Tuition aid program being planned	. .	. .	. .	.4	. .	. .	. .	.7	2.2	.3
Does not apply (provides no aid)	50.0	50.0	100.0	63.4	58.6	81.1	82.1	28.9	71.7	60.2
No answer to entire question	. .	50.0	. .	2.1	. .	2.7	. .	. .	2.2	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.1	100.0	100.0	100.0	99.9
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 61, for a table that includes number as well as percentage of firms in each industry category.

We like them to go to school as soon as possible.

Most of our new employees would not be aware of a program at first.

We like to have new employees take courses.

We always believe in helping employees.

Tables 35 and 36 show the percentage distribution of companies requiring or not requiring company longevity for tuition aid eligibility classified by clerical employee size and by industrial classification, respectively. The most noticeable variation was that the majority of companies reporting no length of employment requirement were classified as finance, insurance, and real estate. This may reflect the fact that the American Institute of Banking offers courses designed for employees entering the banking field.

C. Anticipated Future of Training[7]

Future Training Plans

For the most part companies were not planning to offer any other training for clerical employees in the near future. Of the 606 responding companies, only 58 or 9.6 per cent reported such plans; 29 or 4.8 per cent indicated some uncertainty, with more than half of them mentioning that the possibility was likely.

Table 37 shows the percentage distribution of responses according to clerical size of company. The proportion of companies with definite or possible plans to offer additional training generally

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[7]See footnote 1 of this chapter for information about the sample on which these findings are based.

TABLE 35.--Distribution of Responses to Question Concerning Length of Employment Necessary for Tuition Aid Eligibility by Clerical Size of Office, 1963-1964[a]

("Must the employee be with the firm for any length of time before becoming eligible for tuition reimbursement?")

Employee Longevity for Tuition Aid	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	16.5	17.0	22.1	33.3	30.4	33.3	25.0	18.2	20.0
Did not describe	4.7	4.6	1.9	5.1	13.0	5.6	. .	18.2	4.5
No set policy	. .	1.3	. .	. .	. .	5.6	. .	. .	.5
1 month	. .	. .	1.0	1.3	. .	. .	. .	. .	.3
2 months	1.2	. .	. .	. .	. .	. .	. .	. .	.3
3 months	2.4	1.3	5.8	7.7	4.3	5.6	8.3	. .	3.5
4 months	.6	. .	. .	. .	. .	. .	. .	. .	.2
6 months	2.4	4.6	2.9	6.4	4.3	5.6	8.3	. .	3.6
1 year	2.9	2.6	4.8	7.7	4.3	5.6	8.3	. .	3.8
2 years	. .	. .	1.9	. .	. .	. .	. .	. .	.3
5 years	.6	. .	. .	. .	. .	. .	. .	. .	.2
Individual basis	1.2	1.3	1.9	1.3	. .	. .	. .	. .	1.2
Employee in good standing, permanent employee	. .	1.3	1.0	. .	. .	5.6	. .	. .	.7
Department approval	.6	. .	1.0	3.8	4.3	. .	. .	. .	1.0
No	17.1	11.8	24.0	20.5	26.1	11.1	41.7	. .	16.7
No answer to this part of question	1.2	2.0	1.0	. .	. .	. .	. .	9.1	1.2
Tuition aid program being planned	. .	.7	. .	1.3	. .	5.6	. .	. .	.5
Does not apply (provides no aid)	91.9	64.7	68.0	51.9	44.9	43.5	50.0	33.3	45.5	60.2
No answer to entire question	8.1	.6	.7	1.0	. .	. .	. .	. .	27.3	1.5
Total	100.0	100.1	100.2	100.0	100.0	100.0	100.0	100.0	100.1	100.1
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 62, for a table that includes number as well as percentage of firms in each clerical size category.

TABLE 36.--Distribution of Responses to Question Concerning Length of Employment Necessary for Tuition Aid Eligibility by Industrial Classification, 1963-1964[a]

("Must the employee be with the firm for any length of time before becoming eligible for tuition reimbursement?")

Employee Longevity for Tuition Aid	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	50.0	. .	. .	21.4	34.5	9.5	8.9	26.1	19.6	20.0
Did not describe	. .	. .	. .	4.9	. .	1.4	5.4	6.3	4.4	4.5
No set policy	. .	. .	. .	.4	. .	1.4	1.8	. .	. .	.5
1 month	. .	. .	. .	.4	. .	. .	. .	. .	2.2	.3
2 months	. .	. .	. .	.4	3.4	. .	. .	. .	. .	.3
3 months	. .	. .	. .	4.5	3.4	. .	. .	6.3	. .	3.5
4 months	. .	. .	. .	.4	. .	. .	. .	. .	. .	.2
6 months	. .	. .	. .	2.5	17.2	. .	. .	5.6	6.5	3.6
1 year	50.0	. .	. .	4.9	10.3	2.7	1.8	2.1	2.2	3.8
2 years	. .	. .	. .	.4	. .	. .	. .	.7	. .	.3
5 years	. .	. .	. .	. .	. .	1.4	. .	. .	. .	.2
Individual basis	. .	. .	. .	1.6	. .	. .	. .	1.4	2.2	1.2
Employee in good standing, permanent employee	. .	. .	. .	.4	. .	2.7	. .	. .	2.2	.7
Department approval	. .	. .	. .	.4	. .	. .	. .	3.5	. .	1.0
No	. .	. .	. .	11.5	6.9	5.4	7.1	43.7	2.2	16.7
No answer to this part of question	. .	. .	. .	1.2	. .	1.4	1.8	.7	2.2	1.2
Tuition aid program being planned	. .	. .	. .	.4	. .	. .	. .	.7	2.2	.5
Does not apply (provides no aid)	50.0	50.0	100.0	63.4	58.6	81.1	82.1	28.9	71.7	60.2
No answer to entire question	. .	50.0	. .	2.1	. .	2.7	. .	. .	2.2	1.5
Total	100.0	100.0	100.0	100.0	100.0	100.1	99.9	100.1	100.1	100.1
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 63, for a table that includes number as well as percentage of firms in each industry category.

TABLE 37.--Distribution of Responses to Question Concerning Plans to Offer Other Training for Clerical Office Workers in the Near Future by Clerical Size of Office, 1963-1964[a]

("Do you plan to offer any other company training for clerical office workers in the near future?")

Plans for Additional Training	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	. .	2.9	4.6	18.3	7.7	21.7	38.9	58.3	18.2	9.6
Subject										
Company policies and procedures	. .	.6	.7	4.8	2.6	4.3	. .	. .	9.1	1.8
Data processing	. .	1.2	1.3	5.8	1.3	. .	. .	. .	9.1	2.0
Skill subjects	. .	. .	. .	5.8	2.6	26.1	27.8	33.3	. .	3.8
Supervisory training	. .	. .	. .	1.0	1.3	. .	5.6	. .	. .	.5
Other courses	. .	. .	. .	. .	2.6	4.3	5.6	8.3	. .	.8
Subject to be determined	. .	1.2	2.6	2.9	. .	4.3	11.1	16.7	. .	2.3
Possibly	2.7	1.8	3.3	1.9	6.4	4.3	. .	8.3	. .	3.0
Data processing	. .	.6	.7	1.9	. .	. .	. .	. .	. .	.7
Don't know	. .	1.8	2.6	. .	3.8	4.3	. .	. .	. .	1.8
No plans	64.9	57.6	85.6	77.9	82.1	65.2	61.1	33.3	72.8	71.9
No answer	32.4	35.9	3.9	1.9	. .	4.3	. .	. .	9.1	13.7
Total	100.0	100.0	100.0	100.0	100.0	99.8	100.0	99.9	100.0	100.0
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 64, for a table that includes number as well as percentage of firms in each clerical size category.

increases as the clerical size category increases. For example, plans to offer other training were reported by 58.3 per cent of the companies in the 1,000 and over clerical size category, whereas such plans were reported by only 38.9 per cent of the companies in the 500-999 clerical size category.

Only a few companies in the small clerical size categories planned or were contemplating any training. Companies reported no plans or supplied no answer to this inquiry in more than 88 per cent of the companies in each of the clerical size categories under 50. The small number of clerical employees in each of these companies would seem to indicate the unlikelihood of these companies planning future training activities. In addition, none of these companies were found to be currently conducting formal training programs; and few indicated a need for such training.

Table 38 shows the percentage distribution of responses according to industry classification. Approximately 20.7 per cent of the companies classified as transportation, communication, and utilities were making definite plans to offer other training. Within other industries the percentage of companies planning to offer other training or even contemplating such training was somewhat less.

Type of Training Being Planned

Of the 58 companies reporting definite plans to offer other training, 49 (8.1 per cent of the responding companies) provided specific information about their future plans. The remaining

TABLE 38.--Distribution of Responses to Question Concerning Plans to Offer Other Training for Clerical Office Workers in the Near Future by Industrial Classification, 1963-1964[a]

("Do you plan to offer any other company training for clerical office workers in the near future?")

Plans for Additional Training	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes	. .	. .	. .	9.5	20.7	4.1	7.1	12.7	8.7	9.6
Subject										
Company policies and procedures	. .	. .	. .	1.6	. .	. .	3.6	3.5	. .	1.8
Data processing	. .	. .	. .	2.5	. .	2.7	1.8	1.4	2.2	2.0
Skill subjects	. .	. .	. .	2.1	13.8	. .	1.8	7.7	4.3	3.8
Supervisory training	. .	. .	. .	.4	3.4	. .	. .	.7	. .	.5
Other courses	. .	. .	. .	.4	. .	. .	. .	2.8	. .	.8
Subject to be determined	. .	. .	. .	3.3	6.9	1.4	. .	1.4	2.2	2.3
Possibly	. .	. .	. .	3.7	. .	4.1	3.6	2.1	2.2	3.0
Data processing	. .	. .	. .	.8	. .	2.7	. .	. .	. .	.7
Don't know	. .	. .	. .	3.3	3.4	. .	. .	.7	2.2	1.8
No plans	100.0	50.0	91.7	59.3	72.4	87.8	87.5	76.7	73.9	71.9
No answer	. .	50.0	8.3	24.3	3.4	4.1	1.8	7.7	13.0	13.7
Total	100.0	100.0	100.0	100.1	99.9	100.1	100.0	99.9	100.0	100.0
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 65, for a table that includes number as well as percentage of firms in each industry category.

companies had not definitely determined the particular subject that was to be offered. Companies that did not describe their plans in the mail questionnaire but responded "yes" to this inquiry were contacted by telephone to determine, if possible, the type of training being planned.

Tables 37 and 38 show that skill training was being planned by 23 companies (3.8 per cent of the responding companies). Skill subjects specified by respondents, with some specifying more than one subject, were as follows:

Telephone techniques (7 firms)
Secretarial procedures (6 firms)
Regular typewriting (5 firms)
Regular shorthand (5 firms)
Teller techniques (4 firms)
Technical typewriting and shorthand (3 firms)
Business mathematics (1 firm)
Comptometer operation (1 firm)
Ten-key adding machine operation (1 firm)

Training in data processing was mentioned by 12 companies, with another 4 companies contemplating such training. This training generally was to involve providing clerical employees with a working knowledge of unit record equipment. Training in company policies and procedures was being planned by 11 companies. One of these companies mentioned developing plans to hold monthly meetings to "explain the force of communication and how each department can help one another." A second company planned to expand their understudy training to other areas. Other types of courses were being planned by 5 companies: a public relations course was being planned by 3 companies; a reading

course, by 1 company; and an effective speaking course, by 1 company. Present employees were to be trained for supervisory positions in 3 companies.

Future Training Needs

Respondents were asked whether or not they thought their clerical employees should have or will need any type of training in the near future. This question turned out to be ambiguous. It could be interpreted to refer to the continuation of present training practices or to the expansion of the present training situation or to both situations. The intent of the inquiry was to learn whether or not more training was or would be needed in certain areas or whether or not training was or would be needed in areas not previously mentioned by respondents. The majority of questionnaire respondents interpreted the question as had been intended. The replies of those that did not were edited accordingly.

Of the 606 respondents, 169 or 27.7 per cent answered "yes"; 27 or 4.5 per cent replied "possibly"; and 24 or 4.0 per cent said that they did not know. Of the remaining respondents, 318 or 52.5 per cent answered "no."

Table 39 shows the percentage distribution of responses according to clerical size of company. The proportion of companies within each clerical size category that expressed definite or possible need for training in the future tends to increase substantially as the clerical size category increases. Only 18.2 per cent of the companies in clerical size category 4-19 expressed definite or possible

TABLE 39.--Distribution of Responses to Question Concerning Future Clerical Training Needs by Clerical Size of Office, 1963-1964[a]

("Do you think the clerical office workers in your company should have or will need any type of company training in the near future?")

Future Training Needs	Size of Office									
	1-3	4-19	20-49	50-99	100-249	250-499	500-999	1,000 & Over	No Ans Re Size	Total
	Expressed in % of those responding in each category above.									
Yes	2.7	14.7	25.5	32.7	38.5	60.9	66.7	91.7	18.2	27.7
Subject										
Company policies and procedures	. .	5.3	3.3	5.8	7.7	8.7	. .	. .	. .	4.6
Data processing	. .	6.5	7.8	14.4	7.7	13.0	27.8	. .	9.1	8.6
Skill subjects	2.7	1.8	2.6	7.7	9.0	30.4	27.8	41.7	. .	6.6
Subject not specified	. .	2.4	12.4	5.8	14.1	17.4	11.1	50.0	9.1	8.6
Possibly	. .	3.5	3.3	4.8	2.6	17.4	22.2	. .	9.1	4.5
Data processing	. .	1.8	.7	1.0	1.3	. .	5.6	. .	9.1	1.3
Skill subjects	. .	. .	. .	. .	. .	4.3	. .	. .	. .	.2
Don't know	5.4	3.5	5.9	3.8	3.8	. .	. .	. .	. .	4.0
Data processing	. .	1.2	.7	1.0	. .	. .	. .	. .	. .	.7
None	73.0	69.4	53.6	45.2	41.0	17.4	5.6	8.3	54.5	52.5
No answer	18.9	8.8	11.8	13.5	14.1	4.3	5.6	. .	18.2	11.4
Total	100.0	99.9	100.1	100.0	100.0	100.0	100.1	100.0	100.0	100.0
(Number of companies in each size of office category)	(37)	(170)	(153)	(104)	(78)	(23)	(18)	(12)	(11)	(606)

[a]See Appendix H, Table 66, for a table that includes number as well as percentage of firms in each clerical size category.

training needs, whereas 91.7 per cent of the companies in clerical size category 1,000 and over expressed definite training needs.

Table 40 shows the percentage distribution of responses according to type of industry. A definite or possible need for training in the future was expressed by a larger proportion of companies classified as finance, insurance, and real estate than by companies in other industries.

Types of Training Needed

Respondents were asked to describe any training that they thought clerical employees should have or will need in the near future. Of 169 companies mentioning that clerical employees should have or will need training in the near future, 116 gave some indication of a possible area of study. An attempt was made to group these replies according to subject. Fifty-three of the companies (8.6 per cent of the responding companies) mentioned a need for data processing, and another 12 (2.0 per cent of the responding companies) indicated some uncertainty about the need for such training. Forty of the companies (6.6 per cent of the responding companies) mentioned skill subjects, and another (.2 per cent of the responding companies) mentioned a possible need for such training. Twenty-eight of the companies (4.6 per cent of the responding companies) indicated company policies and procedures.

Data processing was mentioned by a larger proportion of companies in wholesale trade, in finance, insurance, and real estate, and in manufacturing industries than by companies in other industries. Skill subjects were mentioned most frequently by finance,

TABLE 40.--Distribution of Responses to Question Concerning Future Clerical Training Needs by Industrial Classification, 1963-1964[a]

("Do you think the clerical office workers in your company should have or will need any type of company training in the near future?")

Future Training Needs	Industrial Classification									
	Agric	Mining	Constr	Manuf	Utls	Whsle Trade	Retail Trade	Finance	Svcs	Total
	Expressed in % of those responding in each category above.									
Yes			8.3	23.9	24.1	28.4	23.2	40.8	23.9	27.7
Subject										
Company policies and procedures				3.7	3.4	4.1	3.6	8.5	2.2	4.6
Data processing			8.3	9.5	. .	14.9	1.8	9.9	6.5	8.6
Skill subjects				3.7	17.2	1.4	3.6	12.0	13.0	6.6
Subjects not specified				8.2	3.4	8.1	14.3	11.3	4.3	8.6
Possibly				3.7	10.3	1.4	10.7	3.5	4.3	4.5
Data processing				.8	6.9	. .	5.4	.7	. .	1.3
Skill subjects				. .	. .	. .	1.8	. .	. .	.2
Don't know				4.1	. .	9.5	5.4	2.8	. .	4.0
Data processing				. .	. .	4.1	. .	.7	. .	.7
None	50.0	50.0	83.3	55.6	55.2	58.1	51.8	41.5	52.2	52.5
No answer	50.0	50.0	8.3	12.8	10.3	2.7	8.9	11.3	19.6	11.4
Total	100.0	100.0	99.9	100.1	99.9	100.1	100.0	99.9	100.0	100.1
(Number of companies in each industrial classification)	(2)	(2)	(12)	(243)	(29)	(74)	(56)	(142)	(46)	(606)

[a]See Appendix H, Table 67, for a table that includes number as well as percentage of firms in each industry category.

insurance, and real estate companies. This may reflect the fact that companies in this industry employ a large proportion of clerical employees. Skill subjects that were mentioned, with some respondents listing more than one, included:

Secretarial skills (24 firms)
Secretarial procedures (6 firms)
Telephone techniques (4 firms)
English and spelling (4 firms)
Teller training (3 firms)
Technical knowledge of insurance industry (3 firms)
Technical typewriting and shorthand (3 firms)
Comptometer skills (1 firm)
Ten-key adding machine operation (1 firm)
Reading (1 firm)
Letter writing (1 firm)

A few companies did not indicate the subject area but did provide general information. Some of these companies mentioned that training needs were dependent upon the company's growth or amount of future business activity.

D. Structure of In-Company Formal Training Programs[8]

A series of companies were selected for case analysis. The actual case studies are presented in Volume II, Sections I and II. However, in this section the findings are reported which summarize certain characteristics of training practices described in detail in the case studies.

The cases are presented:

1. To illustrate and validate questionnaire findings regarding formal in-company training practices.

2. To determine the nature, the content, and, when possible and feasible, the structure of formal training activities designed for clerical office employees employed by companies in the Greater Boston area.

3. To determine the nature and the content of formal training activities that were being planned or considered for clerical employees employed by companies in the Greater Boston area.

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[8]Findings in this section are based upon formal training activities that 38 of 41 companies were conducting and/or planning to conduct for clerical employees. In certain instances, findings are based only upon 17 companies and, in one instance, upon 12 companies.

Formal training activities of the remaining three companies were not studied in detail. These companies, employing over 1,000 total employees and 500 and more clerical employees, were multi-unit companies with home offices in this area. One of these companies was an insurance company in the process of moving to another building in the area. This company provided an orientation to company program for new employees (1 session) and job improvement programs for permanent employees in telephone techniques (1 session), effective letter writing (6 sessions), and supervisory development (12 sessions). A second company, a utilities company, currently offered general orientation sessions and was in the process of reorganizing its other clerical training activities. A third company, classified as retail trade, included clerical employees in its sales training program. This program was not described since it involved preparation for future employment in the merchandising field.

A statistical summary of various characteristics of formal training programs was not one of the purposes of this study; however, certain patterns of training practices tend to be identified in the case studies presented in this study. These patterns are brought out by classifying data by structural elements in the findings presented below.

Organizational Structure

Thirty-six of the 38 companies with programs were either single-unit or multi-unit organizations with home offices in the Greater Boston area. The remaining 2 companies were semi-autonomous units of multi-unit companies with home offices in another state.

Purpose

In-company formal training programs generally were of an expedient type, designed to fill a specific present need. These findings, in general, agree with data provided by Potter (44), Anderson (45), Cutler (48), Thomas (54), Wuthenow (55), Belman and Bliek (58), Harrison (58), and Serbein (61).

Of the 38 companies, 31 provided formal training programs for the purpose of preparing some new clerical employees for work in the company.

Eighteen companies provided programs to increase some clerical employees' skill and knowledge for better job performance. Of the 20 companies that were not providing programs for better job performance, 17 did offer or were planning to offer their clerical employees

tuition aid for out-of-company courses designed to accomplish the same purpose.

Fifteen of the 38 companies provided programs to increase some clerical employees' skill and knowledge for job advancement. Ten of these companies also provided their clerical employees with tuition aid for courses related to present or to future work with the company. However, these companies typically provided only a limited amount of in-company training for job advancement.

Only 3 companies provided programs to broaden the general educational background of permanent or of all clerical employees.

Development

Of 17 companies, 15 began their first programs for clerical employees between 1957 and 1964; the remaining 2, in the early 1950's.

In 12 of the 17 companies, programs were instituted to overcome specialized shortage areas such as technical secretaries, medical transcriptionists, secretaries, typists, or comptometer operators or to overcome existing skill deficiencies of new or permanent clerical employees and, in some cases, to prepare permanent clerical employees for job advancement. Four companies instituted programs in order to implement top management's personnel policies; and 1 company, in order to relieve regular employees of some of their training responsibilities. These findings agree with those of Lewis (52), Wuthenow (55), Mandell (56), Harrison (58), and Dartnell (61) to the extent that training programs were instituted to overcome a lack of qualified or skilled personnel.

Responsibility

The administration and organization of formal training for clerical employees were the responsibility of managerial employees assigned to the employee relations function in 27 of the 38 companies and to the administration, sales, or accounting functions in the remaining 11 companies. Cutler (48) and Belman and Bliek (58) also reported that the company's training function was found within or closely associated to the personnel or industrial relations department.

In about two-thirds (26) of the companies, employees administratively responsible for this training also conducted some or all of the class instruction. Stahl (60) also found that training duties are the collateral responsibility, frequently of minor significance, of the person in charge of achieving the training objectives.

Responsibility--Instruction

All but 2 of the 38 companies employed two or more persons as program instructors for clerical employees. Of the 2 companies with only one clerical instructor, 1 company assigned clerical instruction as a major duty; the other, as a minor duty. In the other companies, employees usually carried out clerical instruction as minor or extra duties. Five of these companies also assigned clerical instruction as a major duty to one or two employees.

Program instructors, for the most part, were regular company employees. In 26 of the 38 companies, program instructors included managerial personnel from the employee relations function. Other program instructors included less often were managerial employees

from the administrative, sales, or other organizational functions (24 companies), nonsupervisory office personnel (13 companies), and supervisory personnel (11 companies). In 11 of these companies, instructors who were especially knowledgeable in a particular subject were also drawn from educational institutions and from other business organizations as part-time employees. Studies by Clark and Sloan (58), Belman and Bliek (58), Stahl (60), Sandoz (61), and Serbein (61) reported similar findings.

Job Profiles of Program Instructors

In 12 of these companies, 18 program instructors regularly conducted a sufficient amount of formal clerical training activities to justify summarizing their job profiles. Fifteen of these instructors were employed by the company on a full-time basis; and three, on a part-time basis. Other clerical instructors in these companies as well as in the other 26 companies performed only a minimal amount of clerical instruction, and often on a regular basis, or instructed clerical employees mainly by supervising them on the job.

The 15 full-time company employees had the following titles: employment manager, administrative assistant, assistant to office manager, personnel manager, employment coordinator, supervisor of the technical typewriting department, medical record librarian, transcription section supervisor, group leader, training assistant, secretarial instructor, senior comptometer operator, skill instructor (2 employees), and key punch supervisor.

The major job function of these company employees included one of the following: administration, organization, and instruction of clerical training (4 instructors); employment and placement (3 instructors); department supervision (3 instructors); clerical instruction (2 instructors); office management (2 instructors); and nonsupervisory office work (1 instructor).

The minor job function of the nine company employees with major functions other than clerical training included administration, organization, and instruction of clerical training (5 instructors) or only clerical instruction (4 instructors). The minor job functions of the six company employees performing clerical instruction as a major duty involved one or more of the following duties: serving as a staff or department advisor, assisting a director, supervising financial activities, supervising activities of secretarial groups in two other plants, providing temporary secretarial services, maintaining an efficient secretarial force, conducting company tours, conducting employment and placement activities, preparing training reports and lessons, and checking papers.

The three part-time company employees were employed outside of the company as full-time high school teachers. Their company assignments consisted only of clerical instructional duties.

Twelve of the 18 program instructors had a college degree. Six of these instructors also reported some business school training, varying amounts of graduate work, or a master's degree. The remaining six instructors reported two years of college or some specialized secretarial or office machines training beyond high school. The

amount of formal education generally was not indicative of the amount or the degree of an instructor's clerical training responsibility.

Those with a college degree reported majors in business education (8 instructors), medical record administration (1 instructor), English (1 instructor), science (1 instructor), and psychology (1 instructor). Those with two years of education reported a retailing major (1 instructor) and a secretarial studies major (1 instructor). Those with a limited amount of education beyond high school reported study in comptometer operation (1 instructor), key punch operation (1 instructor), secretarial and industry-related subjects (1 instructor), and business school training (1 instructor).

All of these program instructors reported some prior teaching and/or business experience, ranging from several months to 26 years. The majority reported ten or more years of such experience. The 14 instructors with business experience reported experience in one of the following areas: secretarial, office management, personnel supervision, comptometer operation, employee relations, and retailing. Five of the seven instructors with teaching experience reported teaching in the area of business education. A sixth reported teaching English subjects, and a seventh reported practice teaching in business education.

Trainees--Eligibility

Thirty-six of the 38 companies provided programs for at least some of their new clerical employees. Programs were usually provided for particular employee categories. Secretaries, stenographers, and/or typists were eligible in 17 companies; tellers, in 6 companies; prospective key punch operators, in 2 companies; and comptometer operators, in 2 companies. Other eligible groups, each specified by 1 company, included telephone sales employees and temporary general clerical employees. All new clerical employees were eligible in 11 companies.

Twenty-eight of the 38 companies provided programs for permanent clerical employees. Programs were provided for all permanent employees in 10 companies, all permanent female employees in 1 company, and recommended permanent female employees in 1 company. Programs were also given to particular classifications of clerical employees in 18 companies. Secretaries, stenographers, and/or typists were eligible for programs in 10 companies; prospective tellers, in 6 companies; telephone contact employees, in 3 companies; general clerks, in 2 companies; public contact employees, in 2 companies; comptometer operators, in 2 companies; and prospective trainers, in 2 companies. Other eligible groups, each specified by 1 company, included prospective key punch operators, physically handicapped employees, and employees close to retirement.

Trainees--Selection

In all of the 38 companies, employees were selected to participate in programs by one or a combination of methods. Job classification was included as a criterion in 32 companies. Other methods were each included by less than one-half of the companies: length of employment, employee request, recommendation by employee's superior, recommendation by training or personnel department, and educational background and/or skill achievements. Serbein (61) also found that the criterion most often used to select employees for in-company education is job classification.

Trainees--Required and Voluntary Participation

Thirty-two of the 38 companies included programs in which participation was required for eligible employees. Eligible employees were required to attend all programs, with the exception of those conducted in 1 company, that were concerned with preparing new employees for work in a company. In the company in which participation was not required, the program was concerned with skill training in special skills and was given to help applicants qualify for jobs. Eligible employees were also required to attend most programs that were concerned with improving permanent employees' performance, although 3 companies also offered some of the same programs to other employees on a voluntary basis.

Seventeen of the 38 companies included programs in which participation was voluntary for eligible employees. Eligible employees voluntarily attended most programs that were concerned

with preparing employees for job advancement. Two companies, however, included programs in which attendance was required. These programs were designed to improve present job performance as well as to prepare for eventual job advancement. Eligible employees also voluntarily attended all programs that were concerned with broadening general educational background.

Schedule

Companies usually held formal training programs on company time. Thirty-one companies conducted training programs on company time; 5, on employee time; and 2, on both company and employee time. Of the programs held on company time, attendance was compulsory in some programs and voluntary in others; of the programs conducted on employee time, attendance, with one exception, was voluntary. Potter (44) also reported that employees attended classes voluntarily after working hours.

All programs concerned with preparing new employees for work in the company were conducted on company time. Most of those programs concerned with preparing permanent employees for better job performance and for job advancement were also conducted on company time. However, those activities concerned with increasing the general educational background of permanent employees were conducted after working hours. Programs were occasionally scheduled partly during working hours and partly after working hours when training was considered directly beneficial to the company as well as to employees.

Program content and trainee's job performance were often major factors that determined the length of training. In general, length of programs varied widely ranging from one hour to nearly 300 hours of class instruction. Most common were those programs consisting of nine to ten hours of class instruction. Programs were conducted over a period ranging from one to two hours (4 programs) to two years of intermittent training (2 programs). Most common were those programs conducted within a period of 12 weeks or less. Sessions most often lasted from one to two hours.

Physical Facilities

In 37 of the 38 companies, formal training programs were held on company premises. Programs were held partly or completely in general purpose rooms by 31 companies and in the office work area by 24 companies, with 1 company using only the office work area. Three of these companies equipped a general purpose room with rented office machines or with machines from the office area when needed in class instruction. Six other companies had their own clerical training rooms equipped with typewriters and other special equipment. Three of these 6 companies also included the office work area in some of their programs; a fourth, a general purpose room.

Cost

Companies provided training at no expense to employees. In the 17 companies studied in detail, cost to the company usually included current operating expenses, such as instructors' salaries, trainees'

salaries, and various supplies, and initial expenses, such as office equipment and textbooks. Cost of using company facilities for training, cost of employees' time while training, and cost of training personnel's time in preparing materials for training and conducting training sessions were usually not considered in determining total training expenditures. Companies, for the most part, did not appropriate a specific amount of money for clerical training and did not separate training expenses incurred in training clerical employees from those incurred in training other company employees.

Programs

The number of different programs maintained by these 38 companies ranged from 1 to 16 programs. Thirty-two companies reported three or less programs: 20 companies reported one program apiece; 7 companies, two programs apiece; and 5 companies, three programs apiece.

More programs were provided for permanent clerical employees than for new clerical employees. Of 103 programs offered by these companies, 47 programs were open only to permanent clerical employees; 28 programs, only to new clerical employees; and 28 programs, to both new and permanent clerical employees.

Program Content

Formal training programs for clerical employees included one or more of the following activities: orientation to company policies and procedures, skill training in job duties and procedures, skill training in special skills and knowledges, and general education

subjects. Programs that included orientation to company policies and procedures and those that included skill training in job duties and procedures were given mainly to new clerical employees.

Twenty-nine of the 38 companies conducted programs that included orientation to company policies and procedures. Of these companies, 27 provided this type of training in order to prepare some new clerical employees for work in the company; 6, to improve job performance of some permanent clerical employees; and 6, to prepare permanent clerical employees for advancement to teller positions.

Twenty-eight of the 38 companies conducted programs that included skill training in job duties and procedures. Of these companies, 26 provided this type of training in order to prepare some new clerical employees for work in a company; 7, to improve job performance of some permanent clerical employees; and 6, to prepare permanent clerical employees for advancement to teller positions.

Twenty-seven of the 38 companies conducted programs that were concerned with remedial and/or new skill training in special skills and knowledges. Twenty-three companies gave this type of training to some new clerical employees; 22, to some permanent clerical employees.

Of these 27 companies, 21 taught new skills and knowledges to some new clerical employees to enable them to perform certain job duties and procedures. New skills and knowledges taught to these employees included: machine transcription; technical typewriting

and shorthand; office and/or secretarial procedures; regular typewriting; key punch operation; customer relations; company- and industry-related knowledge; comptometer operation; shorthand theory, dictation, and transcription; reproducing processes; medical science; and office machines.

Of these 27 companies, 19 taught new skills and knowledges to some permanent clerical employees to prepare them for increased job responsibilities or for job advancement. New skills and knowledges taught to these employees included: supervisory training; shorthand theory, dictation, and transcription; office and/or secretarial procedures; customer relations; comptometer operation; calculator operation; ten-key adding machine operation; key punch operation; regular typewriting; business English; modern business letter writing; and secretarial development.

In 9 of these 27 companies, permanent clerical employees were prepared for job advancement by attending the same programs being conducted for new clerical employees. Subjects open to both groups of employees were customer relations (teller techniques), comptometer operation, key punch operation, regular typewriting, and shorthand dictation and transcription.

Of these 27 companies, 12 taught remedial skill training in special skills and knowledges to some of their new clerical employees to help them overcome skill deficiencies. Remedial training was given in the following subjects: regular typewriting, office and/or secretarial procedures, telephone usage, shorthand dictation and

transcription, English fundamentals, spelling, and use of source materials.

Of these 27 companies, 15 taught remedial skill training in special skills and knowledges to some of their permanent clerical employees to improve their job performance. Remedial training was given in the following subjects: telephone usage, office and/or secretarial procedures, typewriting, shorthand dictation and transcription, business arithmetic, secretarial skills, ten-key adding machine operation, calculator operation, customer relations, business English, and business letter writing.

Three companies not included in the tally of 27 companies providing skill training in special skills and knowledges indirectly included some remedial skill training in their programs for new clerical employees. Trainees in these programs were given more complex assignments as their skills improved, with length of training varying directly with skill abilities.

Six of the 38 companies conducted programs in general education. Four of these companies gave training to permanent clerical employees; and 2, to both new and permanent ones. Of these 6 companies, 3 gave training to improve job performance. Subjects included speed reading and/or effective speaking. Three others gave training to increase general educational background. Subjects included English, mathematics, science, general interest topics, and economic education.

Instructional Methods

Instructional methods that these 38 companies reported using reflected to a certain extent the purpose, type, and subject matter of the various formal training programs. Programs that combined class instruction with some form of understudy method, pool training, or other supervised on-the-job training were reported by 19 companies. Programs that consisted of a series of class sessions were reported by 17 companies. Vestibule training was reported by 6 companies and was combined with a temporary secretarial service by 5 of them. Other methods were each reported by fewer than 4 companies: a single one- to two-hour class, a day of lectures, monthly meetings, five days of class instruction, and programmed instruction.

All of the 38 companies used some combination of lecture, discussion, and/or demonstration methods in their programs. Thirty-one companies included class practice and/or supervised on-the-job training in at least one of their programs. Role playing was used by 7 companies, and company tours were used by 4 companies.

Instructional Materials

The use of different kinds of instructional materials was dependent upon the purpose, type, and subject matter of the training being offered. Most (15) of the 17 companies that were studied in detail used some type of company materials in their formal training programs. Among the types of materials used were those especially prepared by company personnel and by university personnel to fit a particular program, company manuals, samples of job materials, completed job assignments for practice purposes, and live work.

Ten of the 17 companies used published materials when they fitted a program's objectives. These materials included high school or college textbooks, secretarial pamphlets and handbooks, office machine manuals and other booklets from equipment suppliers, American Banking Association publications, and various reference books.

Twelve companies used, usually to a limited extent, some audio-visual aids equipment. Equipment that was used included films, tapes, flip charts, overhead projectors, perceptoscopes, tachistoscopes, and Strong-Pacers.

Reward

Of the 17 companies studied in detail, 13 frequently recognized completion of training by placing new employees in temporary or permanent positions or by promoting permanent employees. Only 3 companies presented certificates to new and/or permanent employees upon satisfactory completion of a program. Another company recognized program attendance with door prizes.

Evaluation

All but one of the 17 companies studied in detail evaluated in some way at least one of their formal training programs during and/or upon completion of training. Thirteen companies evaluated some of their trainees during training; 11 companies, upon completion of training or at a later date in conjunction with the company's evaluation policy for all employees. Four companies had the training program evaluated by trainees.

In 15 of the 17 companies, trainees' performance was evaluated by training managers, program instructors, and/or supervisors. Methods used to evaluate trainees during and/or upon completion of training included one or more of the following: written assessments of performance, attitudes, and/or attendance in class or in the work area (9 companies); tests (8 companies); verbal assessments of performance in class or in the work area (4 companies); and examination of attendance records (1 company).

Information gained from evaluations during training was used in one or more of the following ways: to determine progress in training, to identify training deficiencies, to overcome identified deficiencies with training, to bring identified deficiencies to trainee's attention, to improve present program, and to justify extending length of training for a trainee. Information gained from evaluations upon completion of training was used in one or more of the following ways: to determine satisfactory completion of program, to determine additional training needs, to determine eligibility for certain positions, to determine program achievements, to provide trainee's supervisor with a record for various purposes, and to improve present program.

Trainees in only 4 of the 17 companies evaluated the effectiveness of a training program. These program evaluations were used by personnel administratively responsible for formally training clerical employees in order to improve present programs, and, in one instance, to help program speakers improve their lecture presentations.

Only 3 of the 17 companies provided management with administrative reports concerning current training activity and an indication of current and future training needs. These reports included information about the number of incoming and outgoing trainees, the progam's format, training results, work activities, and special projects.

Follow-up of Training

Of the 17 companies, only 7 followed up some of their formal training programs in order to remedy any deficiencies in training programs or in job performance of former trainees. In 3 companies, the person in charge of training obtained information from discussions with former trainees' supervisors and/or from discussions with those former trainees desiring guidance or to chat informally. This information was used to improve program content or to transfer employees to positions more suited to their skills and abilities. In 3 other companies, deficiencies of some former program trainees were corrected by additional formal or supervised on-the-job training. In the seventh company, the employment manager determined the effectiveness of training by examining job performance, job advancement, and course enrollment. Information was gained from periodic reports from department managers as well as from other reports concerned with personnel activities.

Tuition Aid

Twenty-seven of the 38 companies provided tuition aid programs for their clerical employees; 1 company occasionally provided aid on an individual basis; 1 company was planning to offer aid; and 1 company was considering the matter. Of the 8 companies that provided no aid or were not considering the possibility of providing aid in the future, 6 conducted in-company formal training programs designed to meet some of their permanent clerical employees' needs. These programs were directly concerned with a company's work.

Future Training

Of the 38 companies, 13 intended to enlarge their training activities for clerical employees by adding programs, by adding more training to present program, by adding a training director, or by instituting a tuition aid program. Of the 12 programs to be added by 9 companies, 4 were to include formal training for the purpose of preparing new clerical employees for work in the company; 9, for the purpose of improving job performance of permanent clerical employees; and 5, for the purpose of preparing clerical employees for job advancement. Trainees were to include new and/or permanent secretaries (6 companies), prospective comptometer operators (1 company), new and permanent employees with typewriting skills (2 companies), permanent female clerical employees (1 company), all interested permanent clerical employees (1 company), and permanent clerical employees (1 company).

E. Structure of Out-of-Company Formal Training Programs[9]

Out-of-company agencies that were providing or planning to provide formal training activities for clerical employees were selected for case analysis. The actual case studies are presented in Volume II, Section III. This section presents the findings which summarize certain characteristics of the training practices described in detail in the case studies.

Case studies of out-of-company training agencies are presented:

1. To illustrate and validate questionnaire findings regarding out-of-company training practices.

2. To determine the nature and content of formal out-of-company training offered to clerical employees employed by companies in the Greater Boston area.

3. To determine the nature and content of formal training activities that were being planned or considered for clerical employees by companies in the Greater Boston area.

Types of Agencies

Out-of-company training agencies included chambers of commerce, consulting agencies, equipment suppliers that manufactured or supplied office equipment, and trade associations.

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[9]Findings in this section are based upon formal training activities conducted by 12 out-of-company agencies that responding companies reported using in training their clerical employees. Tuition aid programs that involved regular course offerings provided by formal educational institutions, such as schools, colleges, and universities, were excluded from this phase of the investigation.

Purpose

All of these agencies provided some formal training programs that were designed to prepare clerical employees for better job performance. Three agencies also included programs designed to prepare clerical employees for work in the company; and 3, to prepare clerical employees for job advancement, with another agency planning such training.

Responsibility

The person or persons administratively responsible for the clerical training function of the agency usually delegated clerical instruction to full-time personnel employed by the agency and/or to part-time personnel drawn from education or industry.

Trainees-Eligibility

In 10 of the 12 agencies, programs were designated for "all clerical employees" or for clerical employees with particular background, ability, or needs. Six of the 12 agencies provided or were planning to provide programs designated for a particular clerical group, especially those with secretarial and stenographic responsibilities.

Trainees--Selection

Criteria most frequently used in selecting clerical employees for program participation were job classification combined with recommendation by employee's superior or by the company's training or personnel department. Other criteria used in the selection

process included employee's request, educational background and/or skill achievements, course prerequisites, and tests.

Schedule

Programs, with the exception of most of those conducted by the American Institute of Banking, were scheduled during employees' regular working hours. The length of programs in terms of hours varied. Programs, other than those tailored to the needs of an individual company, varied in length from one hour to nearly 100 hours of class instruction. Programs were conducted over a period ranging from one hour to two years (1 program).

Physical Facilities

Programs open to personnel from any company or from a particular type of company were generally conducted on the premises of the agency providing the training or at a hotel or a restaurant. Programs conducted by equipment suppliers for a particular customer were usually conducted on the customer's premises. Programs tailored to meet the needs of an individual company were held on the requesting company's premises.

Cost

Free training was provided by equipment suppliers for their customers' personnel and in certain instances by 1 of the trade associations for member employees. All other agencies conducted training on a fee basis.

In those agencies that conducted training on a fee basis, a fee was charged each trainee for program participation, usually paid by the trainee's company, or was charged each company for assistance with individual training needs. The amount that each agency charged depended upon operational costs and upon whether the agency was a profit- or a nonprofit-making organization.

Program Content

All of the agencies included programs that were concerned with skill training in special skills and knowledges. This training was designed to overcome skill deficiencies or to provide new skills. Remedial training was given in secretarial procedures, secretarial skills, and telephone usage. Training in new skills and knowledges was given in unit record equipment, computer equipment, switchboard operation, supervisory training, and industry-related topics and was soon to be given in technical secretarial skills. Skill training was also tailored to a company's individual needs and included both remedial and new skill training.

Five of the 12 agencies included programs that contained some skill training in job duties and procedures. Programs concerned with orientation to company policies and procedures for new employees and with general education for permanent employees were included by only 1 agency, the American Institute of Banking.

Program Implementation

Programs were conducted as a single or a series of class sessions. Lecture, discussion, and/or demonstration techniques were used.

All but 2 of the 12 agencies prepared or planned to prepare some of their own instructional materials including training manuals, programmed instructional materials, textbooks, and films. Published materials were used by 4 agencies.

All but 1 of the 12 agencies awarded or were planning to award a certificate of attendance and/or achievement upon completion of training.

During or upon completion of training, some evaluation of a trainee's performance was included by 4 agencies. Only 2 agencies had trainees evaluate the program. Information obtained was used in planning future programs.

Only 1 agency followed up some of its formal training at a later date in order to remedy any deficiencies in former trainees' job performance.

Summary

This chapter examined data obtained from mail questionnaires about clerical training in the Boston SMSA with regard to its present status and to its future development and from case studies of companies and out-of-company agencies providing formal training for clerical employees.

A. The Environment of Training

Two-thirds of the 606 mail respondents were from companies classified as manufacturing and as finance, insurance, and real estate. About three-fourths of the responding companies employed between 4 and 499 total employees and fewer than 100 clerical employees.

B. Present Training Practices

Personnel in charge of training clerical employees most frequently were associated with the administration function. Personnel with the title of office manager or department head were cited most often.

Most of the companies regardless of industry or clerical size classification used a combination of two or more in-company training methods in training their clerical employees. On-the-job training by supervisor and on-the-job training by fellow employee were used by the majority of companies; on-the-job training by predecessor, by slightly over half of the companies. Other training methods were not used as frequently.

Formal training programs were being conducted in almost one-third of the companies employing 1,000 and over total employees. No more than 6 per cent of the companies in each of the other size categories reported such programs, with none reported by companies employing fewer than 20 total employees. The practice of conducting these programs was also related to a company's clerical size. The proportion of companies with programs in each clerical size

category rose with the size of the clerical force. Nearly one-half of these programs were being conducted by companies in the finance, insurance, and real estate industry; and one-fifth, by companies in the manufacturing industry. The remaining programs were conducted, in declining order of frequency, by companies in services; retail trade; transportation, communication, and utilities; and wholesale trade industries. Chi-square analyses used to test the existence of the relationship of certain variables inferred that the use of formal training practices was related (1) to companies employing 250 and over total employees, (2) to companies employing 250 and over clerical employees, and (3) to type of company.

Nearly 30 per cent of the responding companies reported using one or more of the following outside agencies in training their clerical employees: equipment suppliers, industry-sponsored courses, outside secretarial seminars, noncompany consultants, noncompany instructors, special arrangements with business schools, high school adult education courses, and college or university evening courses. The tendency to use outside agencies seemed to be directly related to a company's clerical size and seemed to show some variations between industries. The majority of companies using outside training agencies, irrespective of industrial classification, reported using one or more equipment suppliers. Other outside agencies were used by only a small number of companies.

Only a few companies reported that any of their training was optional for clerical employees. College and university evening courses were most frequently reported as training that was considered

optional. Company courses and courses conducted by equipment suppliers were mentioned occasionally; other types of training, rarely.

Slightly over one-third of the responding companies provided clerical employees with tuition aid. Companies providing aid were most likely to be employing a large number of clerical employees and to be classified in the finance, insurance, and real estate industry. Of the companies providing aid, nearly 60 per cent provided full aid; 30 per cent, partial aid; and 10 per cent, a limited amount of full or partial aid. Tuition aid was usually restricted to those courses that were related in some way to an employee's present or future job. Less than one-half of the companies providing aid specified the particular collegiate institution that clerical employees could attend. Aid was usually contingent upon satisfactory course completion. Some company longevity was often required for tuition aid eligibility.

C. Anticipated Future of Training

Only 15 per cent of the responding companies were planning or contemplating to offer other training for clerical employees in the near future. Subjects mentioned included secretarial skills, data processing, company policies and procedures, supervisory training, public relations, reading, and effective speaking.

About one-third of the companies expressed a definite or possible need for some type of clerical training in the near future. Some of these companies specifically mentioned training in data processing, skill subjects, and company policies and procedures.

D. Structure of In-Company Formal Training Programs

This section summarizes various company training practices that are described in 38 case studies in Volume II, Sections I and II. Each of these case studies identifies and interprets characteristics of a company's training program(s) within the framework of which each one is part.

Most of the 38 companies with programs were either single-unit or multi-unit organizations with home offices in the Greater Boston area. In-company formal training programs for clerical employees were generally designed to fill a specific present need and were instituted to overcome a lack of qualified or skilled personnel. The administration and organization of this training usually was the responsibility of managerial employees assigned to the employee relations function. Program instructors usually were managerial employees performing clerical instruction as a minor duty.

Thirty-six of the 38 companies provided programs for clerical employees, whereas 28 of these companies provided programs for permanent clerical employees. Programs were usually provided for particular employee categories. Employees were usually selected for program participation by one or a combination of methods, with job classification being included by 32 of the 38 companies. Eligible employees were required to attend those programs concerned with performing present job duties but generally were not required to attend those training activities concerned with preparing for other jobs and with broadening general educational background.

Companies usually conducted programs during regular working hours on their own premises. Companies most often provided programs concerned with orientation to company policies and procedures, with skill training in job duties and procedures, and with skill training in special skills and knowledges. Only a few companies provided programs in general education. Companies typically conducted programs by combining class instruction with some form of supervised on-the-job training or by scheduling a group of sessions over a specific period of time. The use of instructional materials, rewards, and evaluation and follow-up techniques generally reflected the purpose, type, and subject matter of the various formal training programs.

E. Structure of Out-of-Company Training Programs

This section summarizes training practices of out-of-company agencies that are described in 12 case studies in Volume II, Section III. Each of these case studies describes an agency's training program(s).

Out-of-company training agencies included chambers of commerce, consulting agencies, equipment suppliers, and trade associations. These agencies were generally concerned with providing formal training that prepared clerical employees for better job performance. Program instructors usually were full-time personnel employed by the agency and/or part-time personnel drawn from education and industry. Ten of the 12 agencies provided programs for all clerical employees or for clerical employees with particular background, ability, or

needs; 6 of the agencies provided or were planning to provide programs for a particular clerical group.

Programs were usually scheduled during employees' regular working hours. Programs open to personnel from more than 1 company were conducted on the premises of the agency providing the training; programs conducted for a particular company were usually conducted on the customer's premises.

All of the agencies included programs that were concerned with skill training in special skills and knowledges designed to overcome skill deficiencies or to provide new skills. Other types of training were offered by less than one-half of the agencies. Programs were usually conducted as a single class session or a series of class sessions. Agencies usually prepared their own instructional materials and awarded a certificate of attendance and/or achievement upon completion of training. Evaluation and follow-up of training usually were not carried out by these agencies.

CHAPTER VI

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

Nature of the Problem

This study investigated current company training practices and expected changes with respect to the training of clerical workers of all leading companies in the Greater Boston area.

The study was divided into three phases. The first phase of the study was concerned with determining the present status of company training for clerical workers among companies in the Greater Boston area. An attempt was also made to identify those changes which employers were planning or thought to be desired or needed in the near future concerning the development of company training for clerical workers.

The second phase of the study was concerned with describing as case examples those formal training programs that companies were providing for their clerical workers. The third phase of the study was concerned with describing those formal training programs conducted by out-of-company agencies that companies reported using in training their clerical workers.

Purposes of the Study

The general purpose of this study was to provide businessmen and business educators with data concerning educational and training procedures for clerical workers. More specifically, the purposes of the study were:

1. To provide businessmen with an over-all pattern of the current status of company training for clerical workers as a basis for examining and evaluating their own training practices in terms of current practices and desired practices.

2. To provide those company personnel concerned with the training of clerical workers with case examples of formal training practices that are currently being conducted for clerical workers.

3. To inform business educators about those training programs companies needed for their clerical workers.

4. To acquaint business educators with current training procedures that are being used by companies in order to provide a basis for interchanging ideas with businessmen.

5. To add to the general knowledge of training programs for clerical workers.

6. To identify general trends in the area of company training for clerical workers.

Need for the Study

The need for a study of company training practices for clerical workers in the Greater Boston area was apparent when consideration was given to the following facts:

1. The pattern of labor force growth is changing the composition of the supply of office personnel.

2. The scarcity of trained clerical office workers is increasing.

3. The changes in technology are affecting the activities of clerical office workers.

4. There is little published information regarding training activities conducted by businesses for clerical office workers.

Data from the United States Department of Labor indicate that the pattern of labor force growth is changing the composition of the supply of office personnel. From 1960 to 1975, two-thirds of the net increase in the labor force is expected to be young people under 25 years and adult women over 25 years entering the labor force.[1] Many of the young people and the adult women will choose to work part time.[2] Business will need to employ a large proportion of young and inexperienced workers as clerical employees to fill expanding as well as replacement needs, as employee turnover is high among this particular group of workers. Business will tend to find that these workers will require additional preparation or will need refresher training in order to meet the requirements for efficient office work. Part-time workers will require training especially adapted to their needs.

The main reasons for the increasing scarcity of trained clerical office workers are: (1) the increasing volume of paperwork in business and government operations, (2) the low birth rate of the

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[1] Occupational Outlook Handbook, op. cit.

[2] Manpower Challenge of the 1960s, op. cit.

late 30's and the early 40's, (3) the demand for new kinds of skills caused by data processing, and (4) the tendency for increasing proportions of high school youths to obtain college training and to prepare for positions with more prestige and opportunity than clerical ones.

Evidence shows that activities of clerical workers are being affected by changes in technology. Electronic data processing and other laborsaving devices need to be employed to handle the increasing volume and complexity of recordkeeping and communications of business operations. The work requirements of even the service-type positions are being changed to some extent by the introduction of new office machines. The growing complexity of many jobs and the adjustment of technological changes to the labor supply and labor demand stress the need for companies to provide training and retraining for new and for experienced clerical workers. A gap, however, exists between training given in schools and training required by businesses.

The usefulness of information about company training practices for clerical workers indicates a periodic need to investigate company training. Such information is necessary to business educators in helping them continuously develop and improve curricula designed to prepare students for clerical positions both now and in the future. Both business educators and businessmen can utilize this knowledge in solving their own training problems or in developing their own training programs. Possible reports about the potentialities or limitations of new teaching methods and devices help in finding

faster and more efficient methods of training that economic and social pressures of our economy are requiring. This information further helps in determining the extent that business duplicates instruction currently available in educational institutions and provides a basis for coordinating educational and training activities of businesses and schools for effective utilization of joint talents and resources.

Finally, the need for this information is indicated from a review of related studies. The findings of many of the studies reviewed tend to be limited by the dates of the investigations and by changes that have been occurring in the office situation with the introduction of automation. Moreover, these studies tend to focus attention upon new clerical office workers or upon firms that are large and well known rather than upon all levels of clerical office workers and upon firms of all sizes and types.

Limitations of the Study

This study was confined to those business firms located in the Greater Boston area, also known as the Boston Statistical Metropolitan Area or the Boston SMSA, which were in operation in the fall of 1963.

The study was limited to all firms, regardless of size, that were listed in the 1963 Dun and Bradstreet Million Dollar Directory, in Greater Boston Chamber of Commerce data, and in the 1963-1964 membership roster of the Boston Chapter of the National Office Management Association. Educational institutions and federal government agencies were excluded.

The findings concerning training and educational practices were limited to clerical office workers employed by companies in the Greater Boston area.

The Procedure

Nature and Sources of Data

Data for Phase 1 were concerned with present and future training practices provided by companies for their clerical employees. Data were obtained from mail questionnaires completed by managerial personnel in selected companies in the Boston SMSA. In a few cases, a limited amount of data was obtained from telephone interviews with managerial personnel.

Data for Phase 2 were concerned about the structure of formal training activities provided and/or sponsored by companies for their clerical employees. Data were obtained from personal interviews with personnel in charge of administering and/or instructing in formal programs in companies included in Phase 1. Additional data were frequently obtained from observing classes in session and from company materials supplied by interviewees.

Data for Phase 3 were concerned about the structure of training activities provided by out-of-company agencies. Data were obtained through personnel interviews with those in charge of training activities supplemented by participation in training sessions as a trainee, direct correspondence with interviewees, and printed materials supplied by interviewees.

Background data were obtained from published and unpublished federal and state documents and from personnel interviews with federal and state government representatives.

The Sample

The statistical universe consisted of all business firms located in the Boston SMSA in the fall of 1963. The business firm was selected as the sample unit. A firm or a company was defined as either a single-unit organization or a multi-unit organization consisting of plants, establishments, and/or divisions with varying degrees of autonomy. Independent subsidiaries were considered as separate companies.

The sample of business firms for Phase 1 was selected by purposive sampling, a nonrandom sampling method. The main criteria used in selecting companies for Phase 1 involved financial status, employee size, and interest in the office function. The sample consisted of 677 companies drawn from three sources: (1) Dun and Bradstreet's directory, (2) the Greater Boston Chamber of Commerce, and (3) the Boston Chapter of the National Office Management Association.

Chi-square analysis for goodness of fit was used to determine whether there was any difference between population and sample frequencies. The computed values of chi square that were not significant beyond the 5 per cent probability level inferred that the sample distribution of companies employing 500 and over employees did not differ significantly from the population distribution of companies with 500 and over employees classified by size and by industry, respectively.

The sample for Phase 2 was a subsample of Phase 1. It was composed of 41 companies that were conducting formal training activities for their clerical employees.

The sample for Phase 3 consisted of out-of-company agencies that companies in Phase 1 reported using or planning to use to train their clerical employees. These agencies included chambers of commerce, equipment suppliers, consulting organizations, and trade associations. Educational institutions providing regular course offerings that were approved by companies through tuition aid plans or other special arrangements were not described here.

Method of Data Collection

Data for Phase 1 were sought by mailing questionnaires to the executive in charge of each company's personnel or office function. Questionnaires were mailed in September 1963. In March 1964 a second questionnaire was sent. Companies that did not respond to the second mailing were contacted by telephone. In a few cases a third questionnaire was sent. Of the 677 managerial employees that were sent questionnaires, 645 or 95.3 per cent replied in one of four ways: (1) by returning the questionnaire, (2) by sending a letter, (3) by making a notation on the letter of transmittal, or (4) by participating in a telephone interview. Of these 645 replies, 606 were usable mail questionnaires. The 32 nonrespondents were distributed among the industries, with 22 employing under 250 employees.

Chi-square analysis for goodness of fit was used to determine whether there was any significant difference between the distribution of the entire sample and (1) that of the 645 companies that replied in some way and (2) that of the 606 companies that provided usable questionnaires with regard to company size and to industrial classification. The computed values of chi square were not significant beyond the 5 per cent probability level. This inferred that the distribution of the 645 and 606 respondents, respectively, typified both nonrespondents and respondents with regard to company size and with regard to type of company, respectively.

Chi-square analysis for goodness of fit was also used to determine whether there was any significant difference in the distribution of the respondents and that of the population containing 500 and over employees with regard to company size and to industrial classification. The computed values of chi square were not significant beyond the 5 per cent probability level. This inferred that the distribution of respondents employing 500 and over employees did not differ significantly from that part of the population employing a similar number of employees with regard to size and with regard to type of company, respectively.

About four-fifths of the respondents indicated that they were associated with their company's employee relations function or administration function. About two-thirds of the respondents had titles indicating that they were in charge of their company's personnel or office function.

Data for Phase 2 were obtained from personal interviews with company personnel, supplemented by observing classes in session and

by company materials supplied by interviewees. Of 41 companies to be interviewed, 38 or 92.3 per cent were possible. Interviews were completed by August 31, 1964.

Data for Phase 3 were obtained similarly. Data about 12 out-of-company agencies were obtained from personal conferences with those in charge of training activities, supplemented by direct correspondence with conferees, by printed materials supplied by them, and by observing and/or participating in training sessions. In one case data were obtained completely by mail correspondence and by telephone. Interviews were completed by August 31, 1964.

Method of Data Analysis

The statistical analysis for Phase 1 consisted primarily of tabulating answers to various items on the mail questionnaire and converting these totals to percentages. Tabulation of data by industry, by total employee size, and by clerical employee size were carried out where variations according to each of these factors seemed important. Tabulation of data by industry involved classifying companies by their principal activity of business. The same classification procedures that were being used by the Massachusetts Division of Employment Security were followed. Tabulation of data by companies' total or clerical employee size was carried out according to the employee breakdown used by the federal government in reporting census data and certain research findings. Chi-square analysis, tested at the 5 per cent probability level, was used to determine the possible existence of any relationship between companies with formal training and those without such training with regard to certain variables.

In Phase 2, data about those formal training programs conducted by responding companies were analyzed in case form.[3] Case studies were divided into two groups, according to the extent of structural analysis that could be applied meaningfully to each company's in-company formal training activity.

The first group contained case studies of 17 companies. Each study included an overview of a company's clerical training function. Within this frame, the company's formal training activities were described according to those conducted within the company and those conducted outside of the company. In-company training was described, when possible, according to purpose, administration and organization, objectives, content, and implementation. Out-of-company training was described according to tuition aid plans and other outside agencies that were being utilized in training clerical employees.

The second group contained case studies of 21 companies. In each of these studies, only a company's in-company and out-of-company formal training activities were described.

In Phase 3, data about those formal training programs conducted by out-of-company agencies were analyzed in case form.[4] Each study included a description of an agency's training function and its training activities for clerical employees. The same structural analysis used in Phase 2 was applied, when possible and feasible, to these data. The write up of each case was submitted to each conferee for approval.

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[3]These cases are included in Volume II, Sections I and II.

[4]These cases are included in Volume II, Section III.

The Major Findings

A. The Environment of Training

1. Two-thirds of the 606 mail respondents were from companies classified as manufacturing (43.1 per cent) and as finance, insurance, and real estate (23.5 per cent).

2. The majority (77.2 per cent) of responding companies employed between 4 and 499 total employees. About 22.4 per cent of the responding companies employed 500 and over employees. This latter group of companies represented a possible 78.7 per cent of the 169 companies in the population that employed 500 and over employees.

3. The majority (76.0 per cent) of responding companies employed fewer than 100 clerical employees. Only 5 per cent employed 500 and over clerical employees.

4. The size of a company's clerical force seemed to be related to its total employee size and especially to its industrial classification. Clerical employees were more likely to represent a larger proportion of the work force of those companies in which white-collar occupations predominate than of those companies in which production workers predominate.

B. Present Company Training Practices

5. Companies most frequently delegated responsibility for clerical training to personnel associated with the administration function.

6. The employee in charge of or sharing the responsibility for clerical training performed department head functions in at least 50 per cent of the companies. Employees most often cited as being in charge of clerical training were those with the title of office manager (20.6 per cent), department head (18.0 per cent), supervisor (9.2 per cent), and personnel director (8.6 per cent).

7. Most companies regardless of clerical size or industry classification used a combination of two or more in-company training methods to train their clerical employees. Companies most often used on-the-job training by supervisor (76.4 per cent) and on-the-job training by fellow employee (71.1 per cent). Next in frequency was on-the-job training by predecessor (54.4 per cent) and study of company manual (28.7 per cent). Other training methods were used by less than 7 per cent of the companies.

8. Formal training programs were being conducted in almost one-third (31.6 per cent) of the responding companies employing 1,000 and over total employees. In each of the other size categories ranging from 20 to 999 total employees, programs were being conducted by less than 6 per cent of the companies. None were being conducted by companies employing fewer than 20 total employees.

9. The proportion of companies with programs in each clerical size category rose as the clerical size category increased. Programs were being conducted in less than 9 per cent of those companies in each clerical size category under 250 clerical employees, with none being conducted by companies with fewer than 20 clerical employees. On the other hand, programs were being conducted in 39.1 per cent of

the companies in clerical size category 250-499, in 60.1 per cent in clerical size category 500-999, and in 66.7 per cent in clerical size category 1,000 and over.

10. Of the companies with programs, 61.0 per cent were in the 1,000 and over total employee size category. Yet companies in this size category represented less than 9 per cent of the responding 645 companies. Furthermore, of the companies with programs, 68.3 per cent employed 250 and over clerical employees, whereas 94.9 per cent of the companies without programs employed under 250 clerical employees.

11. Of the companies with programs, nearly one-half (48.8 per cent) were from the finance, insurance, and real estate industry; and one-fifth (19.5 per cent) were from the manufacturing industry. The other companies with programs were scattered among four industries: services (12.2 per cent); retail trade (9.8 per cent); transportation, communication, and utilities (7.3 per cent); and wholesale trade (2.4 per cent).

12. Companies involved in nonmanufacturing industries were more likely to conduct formal training programs for clerical employees than those companies involved in manufacturing activities. The percentage of companies conducting programs within each industry varied from a high of 14.1 per cent for finance, insurance, and real estate to a low of 1.1 per cent for wholesale trade. In each of the other industries, the percentage of companies with programs was as follows: transportation, communication, and utilities, 10.3 per cent; services, 9.4 per cent; retail trade, 6.7 per cent; and manufacturing, 3.1 per cent.

13. The use of formal training practices is related (a) to companies employing 250 and over total employees, (b) to companies employing 250 and over clerical employees, and (c) to type of company. The following null hypotheses were each tested by chi-square analysis and were rejected:

1) No significant relationship exists between the use of formal training practices by companies employing under 250 total employees as compared with those employing 250 and over total employees.

2) No significant relationship exists between the use of formal training practices by companies employing under 500 total employees as compared with those employing 500 and over total employees.

3) No significant relationship exists between the use of formal training practices by companies employing under 250 clerical employees as compared with those employing 250 and over clerical employees.

4) No significant relationship exists between the use of formal training practices by companies employing under 500 clerical employees as compared with those employing 500 and over clerical employees.

5) No significant relationship exists between the use of formal training practices and type of company.

14. The tendency to use out-of-company agencies appeared to increase as a company's clerical employee size increased. Approximately 30 per cent of the responding companies reported using one or more of the following outside training agencies: equipment suppliers, industry-sponsored courses, outside secretarial seminars, noncompany consultants, noncompany instructors, special arrangements with business schools, college or university evening courses, and high school or adult education courses. Equipment suppliers were used by

21.5 per cent of the companies. Other outside agencies were each used by less than 7 per cent of the companies.

15. Only a small percentage (7.1 per cent) of the responding companies considered any of their clerical training as optional. Enrollment in college and/or university evening courses was reported as being optional for clerical employees by 4.3 per cent of the companies. Other types of training considered optional were each mentioned by less than 2 per cent of the companies: company courses, courses conducted by equipment suppliers, high school adult education courses, American Institute of Banking courses, arrangements with business schools, spare-time training, and on-the-job training for promotion.

16. Slightly over one-third (37.8 per cent) of the responding companies provided tuition aid to clerical employees, and less than 1 per cent (.5 per cent) were in the process of formulating such plans. The percentage of companies that provided tuition aid increased as the clerical size category increased.

17. Tuition aid was restricted as follows:

    a. Of the companies providing aid, about 57 per cent provided full tuition; 30 per cent, partial aid; and 10 per cent, a limited amount of full or partial aid.

    b. About 80 per cent of the companies providing aid specified the type of course that a clerical employee could take for tuition reimbursement. Companies typically required that a course be related in some way to an employee's present or future work in the company.

c. About 43 per cent of the companies providing aid specified particular collegiate institutions that a clerical employee could attend for tuition reimbursement. About two-thirds of these companies were from the finance, insurance, and real estate industry. Most of these companies specified that the only institution approved for tuition aid was the American Institute of Banking.

d. About 70 per cent of the companies providing aid required satisfactory course completion for tuition reimbursement. Those companies that did not were in the finance, insurance, and real estate industry.

e. About 53 per cent of the companies providing aid required that their clerical employees have some company longevity before becoming eligible for tuition reimbursement. The majority of those companies that reported no waiting period for tuition aid eligibility were in the finance, insurance, and real estate industry.

C. Anticipated Future of Training

18. The majority (71.9 per cent) of responding companies were not planning to offer any other training for clerical employees in the near future. About 10 per cent (9.6 per cent) of the responding companies reported that they were planning such training, with an additional 4.9 per cent indicating some uncertainty.

19. The proportion of those companies in each clerical size category with definite or possible plans to offer other training varied directly with the size of the clerical category.

20. Subjects mentioned by companies planning to offer other training included, in declining order of frequency, skill subjects, data processing, company policies and procedures, public relations, supervisory training, speed reading, and effective speaking.

21. Slightly more than one-fourth (27.7 per cent) of the companies thought that clerical employees should have or would need some type of training in the near future; an additional 8.5 per cent indicated some uncertainty. Training that was mentioned as being needed, in declining order of frequency, included data processing, skill subjects, and company policies and procedures.

22. The need for training tended to be directly related to a company's clerical size. Only 18.2 per cent of those companies in clerical size category 4-19 expressed definite or possible training needs, whereas 91.7 per cent of those in clerical size category 1,000 and over expressed these needs.

D. Structure of In-Company Formal Training Programs

23. In-company formal training programs generally were of an expedient type, designed to fill a specific present need. Of 38 companies, 31 included formal training programs designed to prepare new clerical employees for work in the company, 18 provided programs to increase some clerical employees' skills and knowledges for better job performance, and 15 provided programs to increase some clerical employees' skills and knowledges for job advancement. Only 3 companies conducted programs to broaden clerical employees' general educational background.

24. In about two-thirds of the companies, employees in charge of the administration and organization of the formal training function for clerical employees also conducted some or all of the clerical instruction.

25. Formal clerical instruction was usually conducted as a minor duty by full-time company personnel with managerial responsibilities. All 38 companies relied upon their own full-time personnel for formal clerical instruction. In addition, 11 companies also drew instructors who were especially knowledgeable in a particular subject from educational institutions and from other business organizations as part-time employees. Studies by other investigators reported similar findings.

26. Job profiles of 18 program instructors that performed clerical instruction as a regular assignment indicated that these instructors (a) performed this activity as a main function or an activity closely associated with clerical training, such as clerical employment and placement or the management and improvement of job activities that involve clerical employees, (b) had at least some education or training beyond high school, usually a college education, in business education or specialized machine training, and (c) had some prior business and/or teaching experience in areas closely associated or identical to present instructional duties.

27. In 36 out of 38 companies, new clerical employees were eligible for in-company formal training programs; in 28 companies, permanent clerical employees were eligible. Programs were usually provided for particular employee categories, especially secretaries, stenographers, and typists.

28. Clerical employees were usually selected for program participation by one or a combination of methods, with job classification being included as a criterion by 32 out of 38 companies. Other methods each used by less than one-half of the companies included length of employment, employee request, recommendation by employee's superior, recommendation by training or personnel department, and educational background and/or skill achievements.

29. Most companies required eligible employees to attend training programs concerned with performing present job duties but did not require them to attend programs concerned with preparing for other jobs or with broadening general educational background.

30. Thirty-one out of 38 companies conducted formal training programs during regular working hours; 5, on employee time; and 2, on both company and employee time. The length of programs typically consisted of nine to ten hours of class instruction conducted within a period of 12 weeks or less.

31. Thirty-seven out of 38 companies conducted internal formal training programs on their own premises. Most of these companies adapted company facilities to fit their particular training needs.

32. Companies provided formal training programs at no expense to clerical employees. Cost to a company usually included current operating expenses; other costs involved in training clerical employees usually were not considered.

33. Companies most often provided programs concerned with orientation to company policies and procedures, with skill training in job duties and procedures, and with skill training in special skills and knowledges. Only a few companies provided programs in general education.

a. Twenty-nine out of 38 companies provided programs that included orientation to company policies and procedures, and 28 provided programs that included skill training in job duties and procedures. These programs were given mainly to prepare new employees for work in a company.

b. Twenty-seven out of 38 companies provided programs with remedial or new skill training in special skills and knowledges. Twenty-three companies gave this type of training to new employees; and 22, to some permanent employees.

c. Six out of 38 companies conducted programs in general education for new and/or permanent employees.

34. In 19 out of 38 companies, formal clerical instruction was conducted by combining class instruction with some form of understudy training, pool training, or other supervised on-the-job training; and in 17 companies, by scheduling a group of sessions over a specific period of time. Other methods that were each used by fewer than 7 companies included vestibule training, monthly meetings, a day of lectures, and programmed instruction.

35. In all 38 companies, class sessions included lecture, discussion, and/or demonstration techniques. However, 31 of these companies included class practice and/or supervised on-the-job training in at least one of their programs. Role playing and company tours were each used by fewer than 8 companies.

36. The use of different kinds of instructional materials was dependent upon the purpose, type, and subject matter of the training being offered. Fifteen out of 17 companies used the following kinds of instructional materials in their formal training programs: materials especially prepared by their own personnel or other qualified people, company manuals, samples of job materials, completed job assignments for practice purposes, and live work. Ten companies used published materials when they fitted a program's objectives. Twelve companies used audio-visual aids equipment to a limited extent.

37. Thirteen out of 17 companies recognized clerical employees' satisfactory completion of formal training programs by placing them in new positions. Certificates or other company recognition devices were used by only 3 companies.

38. In 15 out of 17 companies, trainees were evaluated by training managers, program instructors, and/or supervisors during and/or upon completion of in-company formal training programs. In 4 out of 17 companies, programs were evaluated by trainees. Companies did not agree on methods of evaluation to be used and on whether trainees should be evaluated either during or upon completion of formal training or at both times. Among the methods used to evaluate trainees' achievement were written or verbal assessment of performance, attitudes, and/or attendance in class or in the work area and test performance.

39. Only 7 out of 17 companies followed up some of their formal training programs in order to remedy any job performance deficiencies or to improve the effectiveness of present programs.

E. Structure of Out-of-Company Training Programs

40. All 12 out-of-company agencies provided some formal training programs designed to prepare clerical employees for better job performance. Three of these agencies provided programs designed to prepare companies for work in the company; and three, for job advancement.

41. Clerical instruction was conducted by full-time personnel employed by the agency and/or by part-time personnel drawn from education and industry.

42. Most (10) of the 12 companies provided programs that were designated for "all clerical employees" or for clerical employees with particular background, ability, or needs. One-half of the agencies provided programs for a particular clerical group, especially those with secretarial and stenographic responsibilities.

43. Clerical employees most frequently were selected for program participation on the basis of job classification combined with recommendation by employee's superior or by company's training or personnel department. Other criteria used in the selection process included employee's request, educational background and/or skill achievements, course prerequisites, and tests.

44. Programs, with the exception of most of those conducted by the American Institute of Banking, were scheduled during employees' regular working hours. The length of programs in terms of hours

varied from one hour to nearly 100 hours of class instruction and were conducted over a period ranging from one hour to two years.

45. Training offered to personnel from any company or from a particular type of company was conducted on the agency's own premises or at a hotel or a restaurant; training provided for a particular customer was conducted on the requesting company's premises.

46. Companies employed out-of-company agencies at no expense to clerical employees.

47. All of the agencies included programs concerned with skill training in special skills and knowledges designed to overcome skill deficiencies or to provide new skills. Other types of training were usually conducted on a limited basis and by fewer than one-half of the agencies.

48. Program implementation was carried on as follows:

a. Programs typically were conducted as single or series of class sessions. Lecture, discussion, and/or demonstration techniques were used.

b. All but 2 agencies prepared their own instructional materials including training manuals, programmed instructional materials, textbooks, and films. Four agencies used published materials.

c. All but 1 agency awarded a certificate of attendance and/or achievement upon completion of training.

d. Only 4 agencies evaluated a trainee's performance during or upon completion of training. Only 2 agencies had trainees evaluate a program to help in planning future programs.

e. Only 1 agency followed up some of its formal training at a later date in order to remedy any deficiencies in former trainees' job performance.

Conclusions

The following conclusions have been drawn from an analysis of the findings of this study concerning in-company and out-of-company educational and training practices of leading companies in the Greater Boston area:

1. Businessmen are concerned about maintaining and improving the efficiency of their clerical work force as indicated by their willingness to cooperate with the investigator in this study, by their establishment and maintenance of formal clerical training programs, by their utilization of out-of-company agencies that provide clerical training, and by offering tuition aid to clerical employees for courses usually related to present and to future work in the company.

2. Companies prefer to train clerical employees by using one or more on-the-job training techniques rather than by employing outside training agencies or by conducting in-company formal training programs.

3. The larger a company's clerical force the more likely the company is to provide clerical employees (a) with full or partial tuition aid for evening school or college courses, (b) with in-company formal training programs, and (c) with training provided by out-of-company agencies.

4. Formal training programs conducted by companies and by outside agencies generally focus upon employees' or an individual company's immediate clerical training needs rather than upon helping

employees prepare for job advancement or for meeting long-range company goals.

5. Duplication of subject matter exists between course offerings of educational institutions and other out-of-company training agencies and in-company formal training programs of business firms in the areas of skill development and general education.

6. A gap exists between clerical training provided in schools and clerical training required for on-the-job performance, as evidenced from the type of formal training being conducted or being planned by companies and by the type of possible future training needs expressed by companies.

7. Clerical job requirements of companies in the Greater Boston area are being affected by technological changes. Adjustments to technological change requires careful planning, analysis, and discussion of factual information concerning the extent of impact on clerical employment. This study indicates a need for training in data processing and in technical secretarial skills.

8. The number of companies with substantial formal training programs for clerical employees is distinctly small. Does this mean that most employers find that they can successfully train their employees by less formalized procedures or do employees need to become more informed about possible training methods and procedures?

9. In-company formal training programs often include some form of supervised on-the-job training or simulated office experience.

10. Many of the companies that conduct formal training programs do not utilize research methods in planning and developing their programs and do not evaluate and follow-up their training efforts in any way.

11. There is a lack of valid evidence concerning the value of training programs. Can programs be measured primarily by the enthusiastic reaction of participants or program instructors? How can program instructors measure changed behavior in their trainees? What criteria should they use in order to make value judgments concerning formal training programs?

Recommendations

The following recommendations are derived from the findings and conclusions of this study:

1. That schools strive to provide clerical training that is common (a) to companies in all industries or to companies in a particular industry and (b) to particular classifications of new and permanent clerical employees.

2. That businessmen give more thought to the cost of clerical training by identifying and analyzing those direct and indirect costs involved in providing clerical employees with informal training, formal training, tuition aid, and other out-of-company training activities.

3. That cooperation between training personnel in education and in industry be encouraged by business educators taking the initiative in: (a) arranging opportunities for training personnel in various

geographical areas to meet at periodic intervals for exchange of training plans, problems, and experiences; (b) establishing depositories in central locations where education and training materials that have been developed may be kept for training personnel of clerical employees; (c) cooperating in the preparation and publication of research reports that have implications for improving clerical training and assisting in compiling digests of current practices with respect to clerical training; and (d) stimulating further inquiry concerning the use of various training approaches and techniques for measuring and evaluating outcomes of clerical training practices.

4. That business educators and school administrators continually examine current clerical practices of business in order to develop, maintain, and revise school curricula that (a) will meet the changing needs of business and (b) will strive to eliminate those deficiencies being found in new and permanent clerical employees by businessmen.

5. That schools consider the possibility of including (a) data processing training in their business curricula in order to train students for beginning data processing positions involving unit record equipment or to provide them with a basic understanding designed to assist them in performing their job functions and (b) technical typewriting and shorthand in their secretarial curricula.

6. That training personnel in education and in industry (a) determine in what areas programmed instruction might be used in

training clerical employees, (b) study the feasibility of using programmed materials in training these employees, and (c) develop programmed materials for company use.

7. That business educators in high schools and in junior colleges include in their business curricula simulation training of office activities in the classroom and, in the last semester, work experience programs.

8. That experimental research be conducted (a) to identify those items that should be included in an analysis of training programs along with the criteria used for selection and (b) to evaluate the various approaches to training and the behavioral and attitudinal changes occurring during training.

9. That the effectiveness of formal training be assessed by comparing companies of the same type and clerical size that conduct formal training programs with those that do not conduct such programs with regard to (a) turnover rate, (b) cost of training clerical employees formally as well as informally, and (c) employees' job performance.

10. That the status of company training for clerical employees in other geographical areas be studied in order to obtain a cross-sectional view.

11. That employers give more thought to planning, developing, and evaluating their formal training activities and solicit the help of business education teachers and other training experts in carrying out their training objectives.

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APPENDICES

STUDY OF IN-COMPANY EDUCATIONAL OR TRAINING PRACTICES FOR CLERICAL OFFICE WORKERS

1. Company:
2. Nature of Business:
3. Number of employees, in all jobs, at all levels:
4. Number of employees, at all levels, who are classified as clerical office workers:
5. Name of respondent:
6. Title of respondent:

I. Present Company Practices

1. Who is in charge of training?
2. Do you have any company program for clerical office workers or give any type of formal training to clerical office workers at any level? _____
3. If so, please describe as follows:

Title of Person to Be Trained	Subject of Training	Purpose of Training	Length of Training

4. Do you use any of the following methods to train your clerical office workers?

____study of company manual
____planned job rotation
____high school adult education courses
____college or university evening courses
____courses taught on company premises
____on-the-job training by predecessor
____on-the-job training by supervisor
____on-the-job training by fellow employee
____other methods (please specify)

5. Do you employ any outside facilities, other than those mentioned in question No. 4, for training your clerical office workers? _____
   If so, please describe:

6. Do you bring in instructors from outside the company? _____
7. Is any of this training optional for your clerical office workers? _____
   If so, please describe:

8. Do you pay any of the evening school or college course tuition for your clerical office workers? _____

   (a) If so, do you pay part of the tuition? _____ or all of the tuition? _____

   (b) Do you specify what type course the clerical office worker can take in order to receive reimbursement? _____

   If so, please describe:

   (c) Do you specify what collegiate institutions the clerical office worker may attend? _____

   If so, please describe:

   (d) Do you specify that the course must be satisfactorily completed before the clerical office worker will receive reimbursement for the course? _____

   (e) Must the employee be with the firm for any length of time before becoming eligible for tuition reimbursement? _____

Future Plans

1. Do you plan to offer any other company training for clerical office workers in the near future? _____

2. If so, please describe as follows:

Title of Person To Receive This Training	Subject of Training to Be Given	Purpose of Training	Length of Training

3. Do you think the clerical office workers in your company should have or will need any type of company training in the near future? _____

   If so, please describe:

4. Comments:

5. If your company has a formal training program for clerical office workers, may I have the privilege of visiting your company in order to study the program in more detail? _____

Please return this questionnaire in the enclosed envelope to: Mrs. Eleanor H. Tedesco
19 Wentworth Road
Canton, Massachusetts

Again, thank you very much for your help.

APPENDIX B

INTERVIEW GUIDE FOR STUDY OF COMPANY TRAINING ACTIVITIES

I. Purpose of the Course or In-Service Program
(new employee preparation, promotion, refresher, remedial, new required skills, upgrading or updating, and/or other)

II. Administration and Organization
- A. For what clerical positions does the company provide formal training?
- B. Subjects included in the program
- C. Program development
  1. Reasons instituted
  2. Changes made since its establishment
  3. Did company personnel and/or outside consultants develop your program?
- D. Personnel responsible for administration and instruction
  1. Titles
  2. Source--number from within or from outside organization
  3. Number employed full time and/or part time
- E. Schedule
  1. How long is the program?
  2. How much training time is devoted to each aspect of the program
  3. Can two or more courses be taken during the same period?
  4. When is the training given? (on company time or on employee time)
  5. How frequently is the training given?
- F. Physical Facilities
  1. Where is the training given?
     a. On company premises, at a school, etc.
     b. General or special training rooms, office, work area, etc.
- G. Employee Eligibility
  1. How do clerical employees qualify for training?
  2. How are they selected for training?
  3. Is participation compulsory or voluntary?
  4. What are the educational and experience requirements?
  5. What is the job classification of employees eligible for the program?
- H. Number Enrolled
  1. How many trainees usually enroll in each course?
  2. Is there a minimum or maximum class size? If so, why?

APPENDIX B--Continued

III. Content of the Program
- A. Areas of study
- B. Specific courses offered in each area
- C. Purpose of each course
- D. Specific objectives of each course
- E. Description of course content

IV. Instructional Materials
- A. What are the materials used for each course? (textbook, supplementary materials, company syllabus, company manual, etc.)
- B. Who prepares company materials?
- C. Are any reference materials used?
- D. Are any supplies needed?
- E. Are any visual and mechanical aids used? (blackboards, chalkboards, slides, films, display boards, flannel boards, tape recorders, etc.)

V. Instructional Methods
- A. What are the methods employed for each course? (lecture, demonstration, general discussion, panel discussion, and/or other)
- B. How often are they used?

VI. Student Activity
- A. Do trainees participate in class? If so, in what way?
- B. Are any outside assignments completed at home or on company time?

VII. Rewards for Satisfactory Course Completion

VIII. Evaluation
- A. Are any informal or formal methods employed to evaluate the effectiveness of training given during the course?
- B. Upon completion of the course?
- C. Who does the evaluation? (personnel manager, office manager, training supervisor, instructor, trainees, and/or other)
- D. What are the factors considered in the evaluation?
- E. Training reports
  1. Are training reports used?
  2. Description of reports (to whom, by whom, purpose, coverage, frequency, etc.)
- F. Are trainees informed of their progress during or upon completion of course?

APPENDIX B--Continued

IX. Follow-up
- A. Upon completion of training are follow-ups made of trainees?
- B. For what reasons are follow-ups made?
- C. Is the information gained from follow-ups used in any particular way?

X. Course Revision
- A. Is the course (or program) revised at any time?
- B. If so, how often, upon what criteria, and in what way is the course (or program) revised?

XI. Cost of Program
- A. Budgetary allotment for training
- B. Total cost of training operation
- C. Cost analysis
  1. Salaries of instructors
  2. Cost of space for training activities
  3. Cost of instructional and student materials and supplies
  4. Cost of special equipment
  5. Salary of trainee while being trained
  6. Other expenses

XII. Training Personnel (Instructors)
- A. Title
- B. Job duties
  1. Description
  2. Percentage of total work time devoted to activities
- C. Educational background
  1. Number of years of college; degrees
  2. Areas of specialization (major/minor)
  3. Other post high school education or training
  4. Specific training in areas now teaching
- D. Experience
  1. Length of time with company
  2. Length of time in present position
  3. Other employment experience of significance to present position
  4. Subjects and grade level of previous teaching experience
- E. What is the title of the person to whom the instructor is responsible?

XIII. Future Plans
- A. Are any changes in present training activities anticipated?
- B. Will any other training be offered in the near future?
- C. If so, have plans been formulated?
- D. If so, in what areas will the company train?

APPENDIX C

INTERVIEW GUIDE FOR STUDY OF OUT-OF-COMPANY TRAINING AGENCY

I. General Information
   - A. Function(s) of agency
   - B. Areas or subjects offered
   - C. Courses offered to clerical employees

II. Administration and Organization
   - A. Development of clerical programs
     1. When started and by whom
     2. Why started
   - B. Personnel responsible
     1. Personnel in charge of administration (titles)
     2. Instructors
        - a. Number
        - b. Required education and experience
        - c. Related duties
   - C. Trainees
     1. Selection process
     2. Voluntary or compulsory participation
     3. Title(s) of trainees selected
     4. Education and experience required
     5. Average class size
   - D. Schedule
     1. Length
     2. Days and hours
     3. Frequency
   - E. Physical Facilities
     1. Where held
     2. Equipment needs
   - F. Cost
     1. List of charges
     2. Cost to trainee and/or company

III. Clerical Program or Course
   - A. Procedures followed in setting up program for companies
   - B. Name of each course
   - C. Purpose of each course
   - D. Objectives of each course
   - E. Description of course content
   - F. Instructional materials and methods used
   - G. Rewards
   - H. Evaluation by agency, by company, by trainees
     1. Purpose
     2. Written or oral
     3. Description of content
   - I. Follow-up by agency or company

APPENDIX C--Continued

IV. Participating Companies
   A. Procedures of informing companies about available training
   B. Type of company represented or invited
   C. Number of companies participating in the past year
   D. Number of trainees participating in the past year
   E. Do the same companies or trainees return for more assistance?

V. Future Clerical Training Plans

19 Wentworth Road
Canton, Massachusetts

A STUDY OF IN-COMPANY TRAINING PRACTICES
OF ALL THE LEADING BUSINESS FIRMS IN THE BOSTON AREA

I am doing a study which has been endorsed by the Boston Chapter of the National Office Management Association to determine the present in-company training practices for clerical office workers. I should very much like to know the current practices of your firm. This study is part of my research at Michigan State University for a doctoral degree. My background includes considerable preparation in business administration and experience in training.

Research is needed to determine what business is doing, and will be doing, in the area of in-company training for all levels of clerical office workers--from the file clerk to the executive secretary. I hope to publish the results as a book of case studies of training practices--you and others would probably find these a useful reference. Such information will give businessmen not only knowledge of current practices and general trends but also will assist them with their future training plans. Moreover, it is most important for business educators to know what business is doing, and will be doing, so that they can assist businessmen in every possible way in the training of these workers.

This study will include all the leading business firms in the Boston area. Thus, I am very interested to learn the present practices of your firm. I should appreciate very much your filling out the enclosed questionnaire and returning it to me as soon as it is convenient. Should you desire to add more information or comments, I should be delighted to have you do so.

I can give you full assurance about the confidential character of your reply. The information you provide will be reported primarily in the form of statistical summaries, and your company will not be revealed in any way.

Your assistance in this study is greatly appreciated. Many thanks for your help.

Sincerely yours,

Mrs. Eleanor Hollis Tedesco

Questionnaire
Return Envelope

Boston Chapter
National Office Management Association
(An International Organization)

ONE FEDERAL STREET BOSTON 10, MASSACHUSETTS Liberty 2-7756

:sident
HENRY T. O'KEEFE
Federal Reserve Bank
30 Pearl Street
Boston 6 — HA 6-7100

First Vice President
CLIFFORD W. KELLY
N. E. Merchants Nat'l Bank
135 Devonshire Street
Boston 9 — RI 2-4000

Second Vice President
GEORGE WRIGHT
Dennison Mfg. Co.
Framingham, Mass.
TR 3-3511

Secretary
MISS BETSY H. SHORT
Bingham, Dana & Gould
1 Federal Street
Boston 10 — LI 2-7756

Treasurer
HARRY F. BOWLBY
Royal Arcanum
Box 392 — Boston 11
HA 6-4135

DIRECTORS

.endance
MRS. ROSE BEUBER
1010 East Street
Dedham — DA 6-3174

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MISS CLARE L. SWEENEY
81 Hammond Road
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Spaulding Moss Co.
401 Summer Street
Boston 10 — LI 2-3000

ucation
MRS. RUTH B. JAMES
Western Girl, Inc.
101 Tremont Street
Boston 8 — HA 6-8622

llowship
THOMAS A. HEDRICK, JR.
Federal Milk Marketing Admn.
230 Congress Street
Boston 10 — LI 2-8636

'mbership
JAMES M. O'CONNELL
Monroe Calculating Machine Co.
700 Beacon Street
Boston 15 — KE 6-7313

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JOHN J. BARRETT
Federal Reserve Bank
30 Pearl Street
Boston 6 — HA 6-7100

blications
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Thermo-Fax Sales, Inc.
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Boston 10 — HA 6-2290

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Miss Margaret A. McKenna
Simmons College
300 The Fenway
Boston 15 — LO 6-7400

search
ALBERT D. OLSEN
Humble Oil & Refining Co.
135 Clarendon Street
Boston 17 — CO 6-2600

hool Relations
FRANCIS A. RIHA
John Donnelly & Sons
3134 Washington Street
Boston 19 — JA 2-8800

June 19 1963

Mrs Eleanor H Tedesco
19 Wenthworth Road
Canton Massachusetts

Dear Mrs Tedesco:

It is my pleasure to advise you that our Board of Directors enthusiastically endorsed your research project in the wide areas of in-service training in industry. We in NOMA have an obligation to the science of management by continually searching for new truths;keeping informed of developments and disseminating our findings with others.

As we anticipate the complexities of tomorrow's office,your efforts should open new avenues for decision and planning in industry's training programs.In addition, it will assist educational institutions to interpret the needs of commerce and industry in developing training programs and courses of study.

We are certainly pleased to give our complete cooperation and assistance towards the successful completion of your fine project.

Sincerely yours

President

OUR 43rd Anniversary 1963

19 Wentworth Road
Canton, Massachusetts

Recently I mailed you a questionnaire to learn about your company's training practices for clerical office employees. I should like very much to have your company represented in this research study.

This survey is part of a doctoral study, endorsed by the Boston Chapter of the National Office Management Association, to determine the present in-company training practices of all the leading firms in the Boston area. So far the questionnaire returns have been good. However, in order that the study will be as complete and as meaningful as possible to business executives and to business educators, I should like to have as close to 100 per cent returns as possible. This means that I need your assistance. Won't you participate by completing the enclosed questionnaire and returning it to me in the envelope provided?

All data will be kept confidential. Your answers will be included in the statistical summaries without identification of your company. As soon as the study is completed, a report of the findings will be sent to you.

I will appreciate very much your participating in this study. I think you will be interested in the findings.

Sincerely yours,

Mrs. Eleanor H. Tedesco

Questionnaire
Return Envelope

APPENDIX G
SUPPLEMENTARY TABLES CONCERNING POPULATION, SAMPLE, AND RESPONDENTS OF STUDY

TABLE 41.–DISTRIBUTION OF COMPANIES SELECTED FOR SAMPLE BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF COMPANY, 1963–1964

Industrial Classification[a]	Size of Company																	
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	..	..	..	..	..	..	1	1.0	1	.6	..	..	..	..	..	..	2	.3
Mining	..	..	..	..	2	2.5	..	..	..	..	..	..	..	..	..	..	2	.3
Construction	..	..	..	..	..	..	4	4.1	4	2.5	2	1.7	2	3.1	1	1.2	13	1.9
Manufacturing	..	..	6	8.8	12	14.8	15	15.5	74	46.0	74	61.7	43	67.2	43	52.4	267	39.4
Utilities[c]	..	..	3	4.4	1	1.2	2	2.1	11	6.8	3	2.5	..	..	10	12.2	30	4.4
Wholesale Trade	..	..	13	19.1	19	23.5	25	25.8	24	14.9	9	7.5	2	3.1	..	..	92	13.6
Retail Trade	1	25.0	5	7.4	9	11.1	13	13.4	4	2.5	10	8.3	11	17.2	10	12.2	63	9.3
Finance[d]	1	25.0	30	44.1	29	35.8	32	33.0	31	19.3	13	10.8	2	3.1	13	15.9	151	22.3
Services	2	50.0	11	16.2	9	11.1	5	5.2	12	7.5	9	7.5	4	6.3	5	6.1	57	8.4
Total	4	100.0	68	100.0	81	100.0	97	100.1[e]	161	100.1[e]	120	100.0	64	100.0	82	100.0	677	99.9[e]

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

APPENDIX G–Continued

TABLE 42.–COMPOSITION OF THE POPULATION OF COMPANIES LOCATED IN BOSTON SMSA EMPLOYING FOUR OR MORE EMPLOYEES BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF COMPANY, FIRST QUARTER 1963
(As Percentages of Row Totals)

Industrial Classification[a]	Size of Company																	
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	..	..	119	74.4	36	22.5	4	2.5	1	.6	..	..	..	..	..	..	160	100.0
Mining	..	..	15	75.0	5	25.0	..	..	..	..	..	..	..	..	..	..	20	100.0
Construction	..	..	1,707	82.6	249	12.1	77	3.7	26	1.3	5	.2	..	..	2	.1	2,066	100.0
Manufacturing	..	..	2,105	53.4	967	24.5	425	10.8	259	6.6	99	2.5	47	1.2	40	1.0	3,942	100.0
Utilities[c]	..	..	840	72.2	173	14.9	72	6.2	46	4.0	15	1.3	9	.8	8	.7	1,163	100.1[e]
Wholesale Trade	..	..	2,462	77.4	487	15.3	139	4.4	74	2.3	13	.4	7	.2	..	..	3,182	100.0
Retail Trade	..	..	6,475	82.6	884	11.3	311	4.0	111	1.4	29	.4	17	.2	10	.1	7,837	100.0
Finance[d]	..	..	1,245	74.6	213	12.8	106	6.4	72	4.3	13	.8	8	.5	11	.7	1,668	100.1[e]
Services	..	..	3,622	78.9	663	14.5	177	3.9	90	2.0	26	.6	5	.1	5	.1	4,588	100.1[e]
Total	..	..	18,590	75.5	3,677	14.9	1,311	5.3	679	2.8	200	.8	93	.4	76	.3	24,626	100.0

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

Source : Computed from Covered Employment- Employers of Four or More, First Quarter 1963, By Area, By Industry, By Size, Boston SMSA, Commonwealth of Massachusetts, Division of Employment Security, Boston, Massachusetts.

APPENDIX G--Continued

TABLE 43.--COMPOSITION OF THE POPULATION OF COMPANIES LOCATED IN BOSTON SMSA EMPLOYING FOUR OR MORE EMPLOYEES BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF COMPANY, FIRST QUARTER 1963
(As Percentages of Column Totals)

Industrial Classification[a]	Size of Company																	
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	..	..	119	.6	36	1.0	4	.3	1	.1	..	..	..	..	..	..	160	.6
Mining	..	..	15	.1	5	.1	..	..	..	..	..	..	..	..	..	..	20	.1
Construction	..	..	1,707	9.2	249	6.8	77	5.9	26	3.8	5	2.5	..	..	2	2.6	2,066	8.4
Manufacturing	..	..	2,105	11.3	967	26.3	425	32.4	259	38.1	99	49.5	47	50.5	40	52.6	3,942	16.0
Utilities[c]	..	..	840	4.5	173	4.7	72	5.5	46	6.8	15	7.5	9	9.7	8	10.5	1,163	4.7
Wholesale Trade	..	..	2,462	13.2	487	13.2	139	10.6	74	10.9	13	6.5	7	7.5	..	..	3,182	12.9
Retail Trade	..	..	6,475	34.8	884	24.0	311	23.7	111	16.3	29	14.5	17	18.3	10	13.2	7,837	31.8
Finance[d]	..	..	1,245	6.7	213	5.8	106	8.1	72	10.6	13	6.5	8	8.6	11	14.5	1,668	6.8
Services	..	..	3,622	19.5	663	18.0	177	13.5	90	13.3	26	13.0	5	5.4	5	6.6	4,588	18.6
Total	..	..	18,590	99.9[e]	3,677	99.9[e]	1,311	100.0	679	99.9[e]	200	100.0	93	100.0	76	100.0	24,626	99.9[e]

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

Source: Computed from Covered Employment--Employers of Four or More, First Quarter 1963, By Area, By Industry, By Size, Boston SMSA, Commonwealth of Massachusetts, Division of Employment Security, Boston, Massachusetts.

APPENDIX G—Continued

TABLE 44.—DISTRIBUTION OF COMPANIES RESPONDING TO MAIL QUESTIONNAIRES AND TO TELEPHONE CALLS BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF COMPANY, 1963–1964

Industrial Classification[a]	Size of Company																	
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	..	..	..	..	..	..	1	1.1	1	.7	..	..	..	..	..	..	2	.3
Mining	..	..	..	..	2	2.5	..	..	..	..	..	..	..	..	..	..	2	.3
Construction	..	..	..	..	..	..	3	3.3	4	2.6	2	1.7	2	3.3	1	1.3	12	1.9
Manufacturing	..	..	6	9.5	11	13.9	14	15.2	71	47.0	72	61.5	40	66.7	40	50.6	254	39.4
Utilities[c]	..	..	3	4.8	1	1.3	2	2.2	10	6.6	3	2.6	..	..	10	12.7	29	4.5
Wholesale Trade	..	..	13	20.6	19	24.1	25	27.2	22	14.6	9	7.7	2	3.3	..	..	90	14.0
Retail Trade	1	25.0	4	6.3	9	11.4	12	13.0	4	2.6	10	8.5	10	16.7	10	12.7	60	9.3
Finance[d]	1	25.0	28	44.4	28	35.4	31	33.7	28	18.5	12	10.3	2	3.3	13	16.5	143	22.2
Services	2	50.0	9	14.3	9	11.4	4	4.3	11	7.3	9	7.7	4	6.7	5	6.3	53	8.2
Total	4	100.0	63	99.9[e]	79	100.0	92	100.0	151	99.9[e]	117	100.0	60	100.0	79	100.1[e]	645	100.1[e]

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

APPENDIX G–Continued

TABLE 45.–DISTRIBUTION OF COMPANIES BY MAIL QUESTIONNAIRE, BY LETTER, BY QUESTIONNAIRE NOTATIONS, AND BY TELEPHONE CALLS CLASSIFIED BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF OFFICE, 1963–1964

Industrial Classification[a]	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	1	2.2	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
Mining	..	..	2	1.0	..	..	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
Construction	4	8.9	5	2.6	2	1.3	..	..	1	1.2	..	..	..	..	..	..	..	..	12	1.9
Manufacturing	8	17.8	65	34.0	72	45.9	43	41.4	46	54.8	8	34.8	6	33.3	1	8.3	5	45.5	254	39.4
Utilities[c]	2	4.4	6	3.1	5	3.2	5	4.8	3	3.6	2	8.7	2	11.1	3	25.0	1	9.1	29	4.5
Wholesale Trade	8	17.8	40	20.9	24	15.3	15	14.4	3	3.6	..	..	..	..	..	..	..	..	90	14.0
Retail Trade	6	13.3	19	9.9	8	5.1	7	6.7	10	12.0	3	13.0	2	11.1	1	8.3	4	36.4	60	9.3
Finance[d]	8	17.8	39	20.4	32	20.4	26	25.0	18	21.4	7	30.4	6	33.3	7	58.3	..	..	143	22.2
Services	8	17.8	15	7.9	13	8.3	8	7.7	3	3.6	3	13.0	2	11.1	..	..	1	9.1	53	8.2
Total	45	100.0	191	99.8[e]	157	100.0	104	100.0	84	100.2[e]	23	99.9[e]	18	99.9[e]	12	99.9[e]	11	100.1[e]	645	100.1[e]

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

TABLE 46.–DISTRIBUTION OF COMPANIES COMPLETING MAIL QUESTIONNAIRES BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF COMPANY, 1963–1964

Industrial Classification[a]	Size of Company																	
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	..	..	..	..	..	..	1	1.2	1	.7	..	..	..	..	..	..	2	.3
Mining	..	..	..	..	2	2.7	..	..	..	..	..	..	..	..	..	..	2	.3
Construction	..	..	..	..	..	..	3	3.7	4	2.7	2	1.8	2	3.4	1	1.3	12	2.0
Manufacturing	..	..	5	9.8	10	13.3	14	17.1	68	46.3	69	61.1	39	66.1	38	49.4	243	40.1
Utilities[c]	..	..	3	5.9	1	1.3	2	2.4	10	6.8	3	2.7	..	..	10	13.0	29	4.8
Wholesale Trade	..	..	7	13.7	17	22.7	19	23.2	21	14.3	8	7.1	2	3.4	..	..	74	12.2
Retail Trade	..	..	4	7.8	8	10.7	10	12.2	4	2.7	10	8.8	10	17.0	10	13.0	56	9.2
Finance[d]	1	50.0	27	52.9	28	37.3	31	37.8	28	19.0	12	10.6	2	3.4	13	16.9	142	23.4
Services	1	50.0	5	9.8	9	12.0	2	2.4	11	7.5	9	8.0	4	6.8	5	6.5	46	7.6
Total	2	100.0	51	99.9[e]	75	100.0	82	100.0	147	100.0	113	100.1[e]	59	100.1[e]	77	100.1[e]	606	99.9[e]
Per Cent of 606 Companies Responding..		(.3)		(8.4)		(12.4)		(13.5)		(24.3)		(18.6)		(9.7)		(12.7)		(99.9)

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

APPENDIX G—Continued

TABLE 47.—DISTRIBUTION OF COMPANIES COMPLETING MAIL QUESTIONNAIRES BY INDUSTRIAL CLASSIFICATION AND BY SIZE OF OFFICE, 1963—1964

Industrial Classification[a]	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Agriculture[b]	1	2.7	..	..	1	.7	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
Mining	..	..	2	1.2	..	..	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
Construction	4	10.8	5	2.9	2	1.3	..	..	1	1.3	..	..	..	..	..	..	..	..	12	2.0
Manufacturing	7	18.9	62	36.5	70	45.8	43	41.3	41	52.6	8	34.8	6	33.3	1	8.3	5	45.5	243	40.1
Utilities[c]	2	5.4	6	3.5	5	3.3	5	4.8	3	3.8	2	8.7	2	11.1	3	25.0	1	9.1	29	4.8
Wholesale Trade	5	13.5	30	17.6	22	14.4	15	14.4	2	2.6	..	..	..	..	..	..	..	..	74	12.2
Retail Trade	5	13.5	16	9.4	8	5.2	7	6.7	10	12.8	3	13.0	2	11.1	1	8.3	4	36.4	56	9.2
Finance[d]	7	18.9	39	22.9	32	20.9	26	25.0	18	23.1	7	30.4	6	33.3	7	58.3	..	..	142	23.4
Services	6	16.2	10	5.9	13	8.5	8	7.7	3	3.8	3	13.0	2	11.1	..	..	1	9.1	46	7.6
Total	37	99.9[e]	170	99.9[e]	153	100.1[e]	104	99.9[e]	78	100.0	23	99.9[e]	18	99.9[e]	12	99.9[e]	11	100.1[e]	606	99.9[e]
Per Cent of 606 Companies Responding		(6.1)		(27.9)		(25.2)		(17.2)		(13.0)		(4.0)		(3.0)		(2.0)		(1.8)		(100.2)

[a]Companies are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries.

[c]Utilities include transportation and communication.

[d]Finance includes insurance and real estate.

[e]The percentages in this table will not necessarily add to 100 per cent because of rounding.

APPENDIX H

SUPPLEMENTARY TABLES CONCERNING RESPONSES TO MAIL QUESTIONNAIRE

TABLE 48.–DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING METHODS USED TO TRAIN CLERICAL OFFICE WORKERS BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you use any of the following methods to train your clerical office workers?")

Method of Training	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%[a]	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	32	86.5	162	95.3	151	98.7	101	97.1	77	98.7	23	100.0	18	100.0	12	100.0	11	100.0	587	96.9
Study of company manual	9	24.3	38	22.4	37	24.2	38	36.5	29	37.2	7	30.4	6	33.3	9	75.0	2	18.2	175	28.9
Planned job rotation	2	5.4	2	1.2	6	3.9	6	5.8	7	9.0	4	17.4	4	22.2	8	66.7	1	9.1	40	6.6
High school adult education courses[b]	..	..	..	..	2	1.3	1	1.0	4	5.1	2	8.7	1	5.6	..	..	..	..	10	1.7
College or university evening courses[b]	..	..	3	1.8	2	1.3	8	7.7	13	16.7	5	21.7	4	22.2	5	41.7	..	..	40	6.6
Courses taught on company premises	..	..	..	..	3	2.0	3	2.9	7	9.0	9	39.1	11	61.1	8	66.7	..	..	41	6.8
On-the-job training by predecessor	13	35.1	80	50.6	88	57.5	50	48.1	49	62.8	20	87.0	11	61.1	9	75.0	4	36.4	330	54.5
On-the-job training by supervisor	14	37.8	115	67.6	116	75.8	88	84.6	74	94.9	20	87.0	17	94.4	11	83.3	8	72.7	463	76.4
On-the-job training by fellow employee	18	48.6	120	70.6	111	72.5	67	64.4	69	88.5	17	73.9	14	77.8	8	66.7	9	81.8	433	71.4
No	4	10.8	5	3.0	..	..	1	1.0	..	..	..	..	..	..	..	..	..	..	10	1.7
No answer	1	2.7	3	1.8	2	1.3	2	1.9	1	1.3	..	..	..	..	..	..	..	..	9	1.5
Total	37	100.0	170	100.1[c]	153	100.0	104	100.0	78	100.0	23	100.0	18	100.0	12	100.0	11	100.0	606	100.1[c]

[a]The percentages in this table and in other tables in this appendix that classify companies by clerical size of office refer to the total number of companies in each size category.

[b]Companies that reported using "High school adult education courses" or "College or university evening courses" also reported using one or more of the other listed training methods. For facility in interpretation of data, responses to both items also have been included in Tables 50 and 51 concerning the use of outside agencies or facilities for training.

[c]The percentages in this table and in certain other tables in this appendix will not necessarily add to 100 per cent because of rounding.

APPENDIX H--Continued

TABLE 48.--DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING METHODS USED TO TRAIN CLERICAL OFFICE WORKERS BY INDUSTRIAL CLASSIFICATION, 1963--1964

("Do you use any of the following methods to train your clerical office workers?")

Method of Training	Industrial Classification[a]																			
	Agric[b]		Mining		Constr		Manuf		Utilities[c]		Wholesale Trade		Retail Trade		Finance[d]		Services		Total	
	No.	%[e]	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	2	100.0	2	100.0	8	66.7	236	97.1	29	100.0	72	97.3	56	100.0	140	98.6	42	91.3	587	96.9
Study of company manual	..	..	1	50.0	1	8.3	69	28.4	9	31.0	15	20.3	9	16.1	50	35.2	21	45.7	175	28.9
Planned job rotation	..	..	..	..	..	..	14	5.8	1	3.4	..	..	2	3.6	19	13.4	4	8.7	40	6.6
High school adult education courses[f]	1	50.0	..	..	..	..	8	3.3	..	..	..	..	..	..	1	.7	..	.:	10	1.7
College or university evening courses[f]	1	50.0	1	50.0	..	..	19	7.8	..	..	..	..	3	5.4	11	7.7	5	10.9	40	6.6
Courses taught on company premises	..	..	..	..	..	..	8	3.3	3	10.3	1	1.4	4	7.1	20	14.1	5	10.9	41	6.8
On-the-job training by predecessor	..	..	1	50.0	3	25.0	151	62.1	14	48.3	42	56.8	30	53.6	67	47.2	22	47.8	330	54.5
On-the-job training by supervisor	2	100.0	2	100.0	5	41.7	184	75.7	23	79.3	54	73.0	48	85.7	111	78.2	34	73.9	463	76.4
On-the-job training by fellow employee	..	..	1	50.0	3	25.0	185	76.1	23	79.3	52	70.3	39	69.6	102	71.8	28	60.9	433	71.4
No	..	..	..	..	3	25.0	2	.8	..	..	2	2.7	..	..	1	.7	2	4.3	10	1.7
No answer	..	..	..	..	1	8.3	5	2.1	..	..	..	..	..	..	1	.7	2	4.3	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.0	29	100.0	74	100.0	56	100.0	142	100.0	46	99.9	606	100.1

[a]Companies in this table and other tables in this appendix that classify companies by industry are classified according to the 1957 revision of the Standard Industrial Classification.

[b]Agriculture includes forestry and fisheries in this and in other tables in this appendix that classify companies by industry.

[c]Utilities include transportation and communication in this and in other tables in this appendix that classify companies by industry.

[d]Finance includes insurance and real estate in this and in other tables in this appendix that classify companies by industry.

[e]The percentages in this table and in other tables in this appendix that classify companies by industry refer to the total number of companies in each industry category.

[f]Companies that reported using "High school adult education courses" or "College or university evening courses" also reported using one or more of the other listed training methods. For facility in interpretation of the data, responses to both items also have been included in Tables 50 and 51 concerning the use of outside agencies or facilities for training.

TABLE 59.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING OUTSIDE AGENCIES USED TO TRAIN CLERICAL OFFICE WORKERS BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you employ any outside facilities, other than those previously mentioned, for training your clerical office workers?")

Outside Agency[a]	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	2.7	31	18.2	44	28.7	36	34.6	32	41.0	12	52.2	14	77.8	10	83.3	1	9.1	181	29.9
Equipment suppliers	1	2.7	27	15.8	37	24.2	27	26.0	16	20.5	9	39.1	7	38.9	5	41.7	1	9.1	130	21.5
Industry-sponsored courses	..	..	1	.6	6	3.9	4	3.8	2	2.6	2	8.7	1	5.6	1	8.3	..	..	17	2.8
Outside secretarial seminars	..	..	1	.6	1	.7	3	2.9	2	2.6	2	8.7	1	5.6	..	..	..	..	10	1.7
Noncompany consultants	..	..	..	..	2	1.3	..	..	..	..	..	..	1	5.6	..	..	..	..	3	.5
Noncompany instructors	..	..	..	..	2	1.3	1	1.0	7	9.0	4	17.4	5	27.8	1	8.3	1	9.1	21	3.5
Special arrangements with business schools	..	..	..	..	..	..	..	..	2	2.6	2	8.7	..	..	..	..	..	..	4	.7
High school adult education courses[b]	..	..	..	..	2	1.3	1	1.0	4	5.1	2	8.7	1	5.6	..	..	..	..	10	1.7
College or university evening courses[b]	..	..	3	1.8	2	1.3	8	7.7	13	16.7	5	21.7	4	22.2	5	41.7	..	..	40	6.6
No	34	91.9	136	80.0	107	69.9	66	63.5	44	56.4	11	47.8	4	22.2	2	16.7	9	81.8	413	68.2
No answer	2	5.4	3	1.8	2	1.3	1	1.0	1	1.3	..	..	..	..	..	..	.1	9.1	10	1.7
Does not apply[c]	..	..	..	..	..	..	1	1.0	1	1.3	..	..	..	..	..	..	..	..	2	.3
Total	37	100.0	170	100.0	153	99.9	104	100.1	78	100.0	23	100.0	18	100.0	12	100.0	11	100.0	606	100.1

[a]All companies that reported using one or more outside agencies or facilities also reported using one or more of the training methods listed in Tables 48 and 49.

[b]Responses to the question concerning methods of training used to train clerical office workers that were identified as outside agencies or facilities such as "High school adult education courses" and "College or University evening courses" have been included in this table to facilitate interpretation of the data.

[c]The expression "Does not apply" is used in this table and in certain other tables in this appendix to denote those companies that indicated that the question did not apply to their situation.

APPENDIX H–Continued

TABLE 51.–DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING OUTSIDE AGENCIES USED TO TRAIN CLERICAL OFFICE WORKERS BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you employ any outside facilities, other than those previously mentioned, for training your clerical office workers?")

Outside Agency[a]	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	1	50.0	1	8.3	81	33.3	6	20.7	17	23.0	13	23.2	45	31.7	16	34.8	181	29.9
Equipment suppliers	..	..	..	..	1	8.3	59	24.3	5	17.2	17	23.0	7	12.5	29	20.4	12	26.1	130	21.5
Industry-sponsored courses	..	..	..	..	..	..	2	.8	..	..	..	..	..	..	15	7.0	..	..	17	2.8
Outside secretarial seminars	..	..	..	..	..	..	4	1.6	1	3.4	2	2.7	1	1.8	..	..	2	4.3	10	1.7
Noncompany consultants	..	..	..	..	..	..	..	..	..	..	1	1.4	1	1.8	..	..	1	2.2	3	.5
Noncompany instructors	..	..	..	..	..	..	6	2.5	..	..	..	..	3	5.4	7	4.2	5	10.9	21	3.5
Special arrangements with business schools	..	..	..	..	..	..	2	.8	..	..	..	..	1	1.8	1	.7	..	..	4	.7
High school adult education courses[b]	1	50.0	..	..	..	..	8	3.3	..	..	..	..	..	..	1	.7	..	..	10	1.7
College or university evening courses[b]	1	50.0	1	50.0	..	..	19	7.8	..	..	..	..	3	5.4	11	7.7	5	10.9	40	6.6
No	1	50.0	..	..	10	83.3	157	64.6	23	79.3	56	75.7	43	76.8	97	68.3	26	56.5	413	68.1
No answer	..	..	1	50.0	..	..	4	1.6	..	..	1	1.4	..	..	..	..	4	8.7	10	1.7
Does not apply	..	..	..	..	1	8.3	1	.4	..	..	..	..	..	..	..	..	..	..	2	.3
Total	2	100.0	2	100.0	12	99.9	243	99.9	29	100.0	74	100.1	56	100.0	142	100.0	46	100.0	606	100.0

[a]All companies that reported using one or more outside agencies or facilities also reported using one or more of the training methods listed in Tables 48 and 49.

[b]Responses to the question concerning methods of training used to train clerical office workers that were identified as outside agencies or facilities such as "High school adult education courses" and College or university evening courses" have been included in this table to facilitate interpretation of the data.

APPENDIX H–Continued

TABLE 52.–DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING TRAINING CONSIDERED OPTIONAL FOR CLERICAL OFFICE WORKERS BY CLERICAL SIZE OF OFFICE, 1963–1964

("Is any of this training optional for your clerical office workers?")

Optional Training	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	3	1.8	5	3.3	3	2.9	12	15.4	5	21.7	8	44.4	5	41.7	2	18.2	43	7.1
High school adult education courses	..	..	.	..	1	.7	..	..	..	..	..	..	..	..	..	..	..	.	1	.2
College or university evening courses	..	..	3	1.8	2	1.3	2	1.9	7	9.0	4	17.4	3	16.7	3	25.0	2	18.2	26	4.3
Courses taught on company premises	..	..	..	..	..	..	..	..	2	2.6	..	..	4	22.2	1	8.3	..	..	7	1.2
Equipment suppliers	..	..	..	..	1	.7	..	..	4	5.1	..	..	..	..	..	..	..	..	5	.8
American Institute of Banking	..	..	..	..	..	..	..	..	..	..	1	4.3	..	..	..	..	..	..	1	.2
Arrangements with business schools	..	..	..	..	..	..	..	..	1	1.3	..	..	..	..	..	..	..	..	1	.2
Spare-time training[a]	..	..	..	..	..	..	1	1.0	..	..	..	..	..	..	..	..	..	..	1	.2
On-the-job training for promotion	..	..	..	..	..	..	..	..	1	1.3	..	..	..	..	..	..	..	..	1	.2
Did not specify	..	..	..	..	2	1.3	..	..	2	2.6	..	..	3	16.7	1	8.3	2	18.2	10	1.7
No	12	32.4	61	35.9	60	39.2	48	46.2	28	35.9	11	47.8	5	27.8	5	41.7	3	27.3	233	38.4
No answer	25	67.6	106	61.8	87	56.9	51	49.0	35	44.9	6	26.1	5	27.8	2	16.7	6	54.5	322	53.1
Does not apply	..	..	1	.6	1	.7	2	1.9	3	3.9	1	4.3	..	..	..	..	..	..	8	1.3
Total	37	100.0	170	100.1	153	100.1	104	100.0	78	100.1	23	99.9	18	100.0	12	100.1	11	100.0	606	99.9

[a]Clerical office workers learn other clerical jobs whenever work load lightens.

APPENDIX H--Continued

TABLE 53.--DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING TRAINING CONSIDERED OPTIONAL FOR CLERICAL OFFICE WORKERS BY INDUSTRIAL CLASSIFICATION, 1963--1964

("Is any of this training optional for your clerical office workers?")

Optional Training	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	1	50.0	..	..	21	8.6	..	..	..	..	5	8.9	11	7.7	4	8.7	43	7.1
High school adult education courses	1	50.0	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.2
College or university evening courses	1	50.0	1	50.0	..	..	15	6.2	..	..	..	..	3	5.4	4	2.8	2	4.3	26	4.3
Courses taught on company premises	..	..	..	..	..	..	4	1.6	..	..	..	..	1	1.8	2	1.4	..	..	7	1.2
Equipment suppliers	..	..	..	..	..	..	5	2.1	..	..	..	..	..	..	..	..	..	..	5	.8
American Institute of Banking	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.7	..	..	1	.2
Arrangements with business schools	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.7	..	..	1	.2
Spare-time training[a]	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	2.2	1	.2
On-the-job training for promotion	..	..	..	..	..	..	..	..	..	..	..	..	1	1.8	..	..	..	..	1	.2
Did not specify	..	..	..	..	..	..	5	2.1	..	..	..	..	1	1.8	3	2.1	1	2.2	10	1.7
No	..	..	..	..	3	25.0	79	32.5	13	44.8	25	33.8	16	28.6	81	57.0	16	34.8	233	38.1
No answer	1	50.0	1	50.0	8	66.7	141	58.0	16	55.2	47	63.5	33	58.9	50	35.2	25	54.3	322	53.1
Does not apply	..	..	..	..	1	8.3	2	.8	..	..	2	2.7	2	3.6	..	..	1	2.2	8	1.3
Total	2	100.0	2	100.0	12	100.0	243	99.9	29	100.0	74	100.0	56	100.0	142	99.9	46	100.0	606	99.9

[a]Clerical office workers learn other clerical jobs whenever work load lightens.

APPENDIX H—Continued

TABLE 54.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING AVAILABLE TUITION AID PROGRAMS FOR CLERICAL OFFICE WORKERS BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you pay any of the evening school or college course tuition for your clerical office workers?")

Amount of Aid	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	59	34.7	47	30.7	49	47.1	42	53.8	13	56.5	8	44.4	8	66.7	3	27.3	229	37.8
100 per cent aid	..	..	39	22.9	33	21.6	28	26.9	17	21.8	3	13.0	4	22.2	5	41.7	1	9.1	130	21.5
85 per cent aid	..	..	..	..	..	..	..	..	1	1.3	..	..	..	..	..	..	..	..	1	.2
80 per cent aid	..	..	..	..	..	..	1	1.0	..	..	..	..	..	..	..	..	..	..	1	.2
75 per cent aid	..	..	2	1.2	..	..	2	1.9	3	3.8	..	..	..	..	..	..	..	..	7	1.2
50 per cent aid	..	..	8	4.7	4	2.6	6	5.8	8	10.3	3	13.0	1	5.6	1	8.3	1	9.1	32	5.3
Per cent of partial aid not specified	..	..	7	4.1	7	4.6	7	6.7	5	6.4	3	13.0	1	5.6	1	8.3	..	..	31	5.1
Full aid only up to a certain amount	..	..	..	..	1	.7	2	1.9	2	2.5	..	..	2	11.1	1	8.3	..	..	8	1.3
Partial aid only up to a certain amount	..	..	..	..	1	.7	1	1.0	..	..	..	..	..	..	..	..	..	..	2	.3
Amount of aid depends on relation of course to job	..	..	..	..	..	..	2	1.9	1	1.3	1	4.3	..	..	..	..	..	..	4	.7
Amount of aid depends on person requesting course	..	..	..	..	1	.7	..	..	1	1.3	2	8.7	..	..	..	..	..	..	4	.7
Amount of aid depends on grades	..	..	2	1.2	..	..	..	..	4	5.1	1	4.3	..	..	..	..	..	..	7	1.2
Amount of aid depends on merit and need	..	..	1	.6	..	..	.	..	..	..	..	..	..	..	..	..	1	9.1	2	.3
Tuition aid program being planned	..	..	..	..	1	.7	..	..	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
No	34	91.9	110	64.7	104	68.0	54	51.9	35	44.9	10	43.5	9	50.0	4	33.3	5	45.5	365	60.2
No answer to entire question	3	8.1	1	.6	1	.7	1	1.0	..	..	..	..	..	..	..	..	3	27.3	9	1.5
Total	37	100.0	170	100.0	153	100.1	104	100.0	78	100.0	23	100.0	18	100.0	12	100.0	11	100.1	606	100.0

APPENDIX H—Continued

TABLE 56.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING AVAILABLE TUITION AID PROGRAMS FOR CLERICAL OFFICE WORKERS BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you pay any of the evening school or college course tuition for your clerical office workers?")

Amount of Aid	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	..	..	..	..	83	34.2	12	41.4	12	16.2	10	17.9	100	70.4	11	23.9	229	37.8
100 per cent aid	..	..	..	..	..	..	27	11.1	3	10.3	7	9.5	6	10.7	84	59.2	3	6.5	130	21.5
85 per cent aid	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	..	..	..	..	1	.2
80 per cent aid	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	2.2	1	.2
75 per cent aid	..	..	..	..	..	..	6	2.5	..	..	..	..	..	..	..	..	1	2.2	7	1.2
50 per cent aid	1	50.0	..	..	..	..	14	5.8	7	24.1	2	2.7	..	..	5	3.5	3	6.5	32	5.3
Per cent of partial aid not specified	..	..	..	..	..	..	15	6.2	2	6.9	3	4.1	2	3.6	6	4.2	3	6.5	31	5.1
Full aid only up to a certain amount	..	..	..	..	..	..	8	3.3	..	..	..	..	..	..	..	..	..	..	8	1.3
Partial aid only up to a certain amount	..	..	..	..	..	..	2	.8	..	..	..	..	..	..	..	..	..	..	2	.3
Amount of aid depends on relation of course to job	..	..	..	..	..	..	1	.4	..	..	..	..	1	1.8	2	1.4	..	..	4	.7
Amount of aid depends on person requesting course	..	..	..	..	..	..	3	1.2	..	..	..	..	..	..	1	.7	..	..	4	.7
Amount of aid depends on grades	..	..	..	..	..	..	5	2.1	..	..	..	..	1	1.8	1	.7	..	..	7	1.2
Amount of aid depends on merit and need	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	..	..	2	.3
Tuition aid program being planned	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	1	2.2	3	.5
No	1	50.0	1	50.0	12	100.0	154	63.4	17	58.6	60	81.1	46	82.1	41	28.9	33	71.7	365	60.2
No answer to entire question	..	..	1	50.0	..	..	5	2.1	..	..	2	2.7	..	..	..	..	1	2.2	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.1	29	100.0	74	100.0	56	100.0	142	100.0	46	100.0	606	100.0

APPENDIX H—Continued

TABLE 58.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING TYPE OF COURSE CLERICAL OFFICE WORKERS MAY TAKE TO RECEIVE REIMBURSEMENT BY CLERICAL SIZE OF OFFICE, 1963—1964

("Do you specify what type course the clerical office worker can take in order to receive reimbursement?")

Type of Course	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	42	24.7	36	23.5	42	40.4	38	48.7	11	47.8	8	44.4	6	50.0	2	18.2	185	30.5
Did not describe	..	..	4	2.4	3	2.0	3	2.9	1	1.3	2	8.7	..	..	1	8.3	..	..	14	2.3
Subjects related to job	..	..	34	20.2	22	14.4	33	31.7	26	33.3	5	21.7	6	33.3	3	25.0	2	18.2	131	21.6
Subjects related to job or leading to a degree	..	..	..	..	..	..	1	1.0	2	2.6	1	4.3	1	5.6	..	..	..	..	5	.8
American Institute of Banking subjects	..	..	3	1.8	4	2.6	..	..	2	2.6	..	..	..	..	..	..	..	..	9	1.5
Business subjects or leading to a degree	..	..	..	..	..	..	1	1.0	1	1.3	..	..	..	..	..	..	..	..	2	.3
Insurance courses	..	..	..	..	2	1.3	..	..	..	..	..	..	1	5.6	1	8.3	..	..	4	.7
Special courses	..	..	1	.6	3	2.0	..	..	..	..	1	4.3	..	..	..	..	..	..	5	.8
Approved by management prior to registration	..	..	..	..	1	.7	2	1.9	2	2.6	2	8.7	..	..	1	8.3	..	..	8	1.3
Determined by company's need for training	..	..	..	..	..	..	1	1.0	1	1.3	..	..	..	..	..	..	..	..	2	.3
Determined by company's need for training and by employee potential	..	..	..	..	1	.7	..	..	1	1.3	..	..	..	..	..	..	..	..	2	.3
Determined on individual basis	..	..	..	..	..	..	1	1.0	..	..	..	..	..	..	..	..	..	..	1	.2
Advantageous to company	..	..	..	..	..	..	..	..	2	2.6	..	..	..	..	..	..	..	..	2	.3
No	..	..	16	9.4	10	6.5	7	6.7	4	5.1	2	8.7	..	..	2	16.7	..	..	41	6.8
No answer to this part of question	..	..	1	.6	1	.7	..	..	..	..	...	..	..	..	..	..	1	9.1	3	.5
Tuition aid program being planned	..	..	..	..	1	.7	..	..	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
Does not apply (provides no aid)	34	91.9	110	64.7	104	68.0	54	51.9	35	44.9	10	43.5	9	50.0	4	33.3	5	45.5	365	60.2
No answer to entire question	3	8.1	1	.6	1	.7	1	1.0	..	..	..	..	..	..	..	..	3	27.3	9	1.5
Total	37	100.0	170	100.0	153	100.1	104	100.2	78	100.0	23	99.9	18	100.0	12	100.0	11	100.1	606	100.0

APPENDIX H--Continued

TABLE 57.--DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING TYPE OF COURSE CLERICAL OFFICE WORKERS MAY TAKE TO RECEIVE REIMBURSEMENT BY INDUSTRIAL CLASSIFICATION, 1963--1964

("Do you specify what type course the clerical office worker can take in order to receive reimbursement?")

Type of Course	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	..	..	..	..	77	31.7	12	41.4	11	14.9	10	17.9	64	45.1	10	21.7	185	30.5
Did not describe	..	..	..	..	..	..	2	.8	..	..	2	2.7	2	3.6	7	4.9	1	2.2	14	2.3
Subjects related to job	1	50.0	..	..	..	..	62	25.5	10	34.5	9	12.2	6	10.7	38	26.8	5	10.9	131	21.6
Subjects related to job or leading to a degree	..	..	..	..	..	..	3	1.2	..	..	..	..	..	..	2	1.4	..	..	5	.8
American Institute of Banking subjects	..	..	..	..	..	..	..	..	..	..	..	..	..	..	9	6.3	..	..	9	1.5
Business subjects or leading to a degree	..	..	..	..	..	..	..	..	..	..	..	..	..	..	2	1.4	..	..	2	.3
Insurance courses	..	..	..	..	..	..	..	..	..	..	..	..	..	..	4	2.8	..	..	4	.7
Special courses	..	..	..	..	..	..	1	.4	1	3.4	..	..	1	1.8	..	..	2	4.4	5	.8
Approved by management prior to registration	..	..	..	..	..	..	4	1.6	1	3.4	..	..	..	..	2	1.4	1	2.2	8	1.3
Determined by company's need for training	..	..	..	..	..	..	2	.8	..	..	..	..	..	..	..	..	..	..	2	.3
Determined by company's need for training and by employee potential	..	..	..	..	..	..	2	.8	..	..	..	..	..	..	..	..	..	..	2	.3
Determined on individual basis	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	2.2	1	.2
Advantageous to company	..	..	..	..	..	..	1	.4	..	..	..	..	1	1.8	..	..	..	..	2	.3
No	..	..	..	..	..	..	5	2.1	..	..	1	1.4	..	..	34	24.0	1	2.2	41	6.8
No answer to this part of question	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	2	1.4	..	..	3	.5
Tuition aid program being planned	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	1	2.2	3	.5
Does not apply (provides no aid)	1	50.0	1	50.0	12	100.0	154	63.4	17	57.6	60	81.1	46	82.1	41	28.9	33	71.7	365	60.2
No answer to entire question	..	..	1	50.0	..	..	5	2.1	..	..	2	2.7	..	..	..	..	1	2.2	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.1	29	100.0	74	100.1	56	100.0	142	100.1	46	100.0	606	99.9

APPENDIX H—Continued

TABLE 58.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING COLLEGIATE INSTITUTIONS THAT CLERICAL OFFICE WORKERS MAY ATTEND FOR TUITION AID BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you specify what collegiate institutions the clerical office workers may attend?")

Type of Institutions	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	28	16.5	24	15.7	15	14.4	17	21.8	4	17.4	4	22.2	6	50.0	..	..	98	16.1
Did not describe	..	..	3	1.8	5	3.3	2	1.9	3	3.8	..	..	..	..	1	8.3	..	..	14	2.3
Only accredited institutions	..	..	1	.6	2	1.3	3	2.9	5	6.4	1	4.3	3	16.7	2	16.7	..	..	17	2.8
American Institute of Banking	..	..	17	10.0	11	7.2	5	4.8	4	5.1	2	8.7	..	..	2	16.7	..	..	41	6.8
American Institute of Banking or Savings Banks Association of Mass	..	..	..	..	2	1.3	1	1.0	..	..	..	..	..	..	..	..	..	..	3	.5
American Institute of Banking or other approved institutions	..	..	3	1.8	2	1.3	..	..	2	2.6	..	..	..	..	..	..	..	..	7	1.2
Specific institutions	..	..	1	.6	1	.7	..	..	2	2.6	1	4.3	..	..	..	..	..	..	5	.8
Approved by management	..	..	2	1.2	1	.7	3	2.9	..	..	..	..	1	5.6	1	8.3	..	..	8	1.3
Accredited institutions and correspondent schools	..	..	..	..	..	..	1	1.0	1	1.3	..	..	..	..	..	..	..	..	2	.3
Limited to Boston area	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.2
No	..	..	30	17.6	23	15.0	34	32.7	25	32.0	9	39.1	4	22.2	2	16.7	2	18.2	129	21.3
No answer to this part of question	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	1	9.1	2	.3
Tuition aid program being planned	..	..	..	..	1	.7	..	..	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
Does not apply (provides no aid)	34	91.9	110	64.7	104	68.0	54	51.9	35	44.9	10	43.5	9	50.0	4	33.3	5	45.5	365	60.2
No answer to entire question	3	8.1	1	.6	1	.7	1	1.0	..	..	..	..	..	..	..	..	3	27.3	9	1.5
Total	37	100.0	170	100.0	153	100.1	104	100.0	78	100.0	23	100.0	18	100.0	12	100.0	11	100.1	606	99.9

APPENDIX H—Continued

TABLE 89.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING COLLEGIATE INSTITUTIONS THAT CLERICAL OFFICE WORKERS MAY ATTEND FOR TUITION AID BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you specify what collegiate institutions the clerical office workers may attend?")

Type of Institutions	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	..	..	..	..	20	8.2	6	20.7	3	4.1	6	10.7	60	42.3	3	6.5	98	16.1
Did not describe	..	..	..	..	..	..	3	1.2	..	..	1	1.4	3	5.4	6	4.2	1	2.2	14	2.3
Only accredited institutions	..	..	..	..	..	..	13	5.3	3	10.3	..	..	..	..	..	..	1	2.2	17	2.8
American Institute of Banking	..	..	..	..	..	..	..	..	..	..	..	..	..	..	41	28.9	..	..	41	6.8
American Institute of Banking or Savings Banks Association of Mass	..	..	..	..	..	..	..	..	..	..	..	..	..	..	3	2.1	..	..	3	.5
American Institute of Banking or other approved institutions	..	..	..	..	..	..	..	..	..	..	..	..	..	..	7	4.9	..	..	7	1.2
Specific institutions	..	..	..	..	..	..	1	.4	1	3.4	..	..	2	3.6	1	.7	..	..	5	.8
Approved by management	..	..	..	..	..	..	3	1.2	1	3.4	1	1.4	1	1.8	2	1.4	..	..	8	1.3
Accredited institutions and correspondent schools	..	..	..	..	..	..	..	..	1	3.4	..	..	..	..	..	..	1	2.2	2	.3
Limited to Boston area	..	..	..	..	..	..	..	..	..	..	1	1.4	..	..	..	..	..	..	1	.2
No	1	50.0	..	..	..	..	62	25.5	6	20.7	8	10.8	4	7.1	40	28.2	8	17.4	129	21.3
No answer to this part of question	..	..	..	..	..	..	1	.4	..	..	1	1.4	..	..	..	..	..	..	2	.3
Tuition aid program being planned	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	1	2.2	3	.5
Does not apply (provides no aid)	1	50.0	1	50.0	12	100.0	154	63.4	17	58.6	60	81.1	46	82.1	41	28.9	33	71.7	365	60.2
No answer to entire question	..	..	1	50.0	..	..	5	2.1	..	..	2	2.7	..	..	..	..	1	2.2	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.0	29	100.0	74	100.1	56	99.9	142	100.1	46	100.0	606	100.0

APPENDIX H—Continued

TABLE 68.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING SATISFACTORY COMPLETION OF COURSES NECESSARY FOR TUITION AID BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you specify that the course must be satisfactorily completed before the clerical office worker will receive reimbursement for the course?")

Satisfactory Course Completion	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	33	19.5	30	19.6	37	35.6	34	43.6	9	39.1	8	44.4	8	66.7	2	18.2	161	26.6
Satisfactorily completed	..	..	30	17.6	29	19.0	36	34.6	28	35.9	8	34.8	8	44.4	8	66.7	2	18.2	149	24.6
B or better	..	..	2	1.2	1	.7	1	1.0	1	1.3	..	..	..	..	..	..	..	..	5	.8
Graded scale	..	..	1	.6	..	..	..	..	5	6.4	1	4.3	..	..	..	..	..	..	7	1.2
No, only attendance	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.2
No, but no further aid given	..	..	2	1.2	1	.7	2	1.9	..	..	2	8.7	..	..	..	..	..	..	7	1.2
No	..	..	22	12.9	15	9.8	10	9.6	8	10.3	2	8.7	.	..	..	..	..	..	57	9.4
No answer to this part of the question	..	..	1	.6	1	.7	..	..	..	..	..	..	..	..	..	..	1	9.1	3	.5
Tuition aid program being planned	..	..	..	..	1	.7	..	..	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
Does not apply (provides no aid)	34	91.9	110	64.7	104	68.0	54	51.9	35	44.9	10	43.5	9	50.0	4	33.3	5	45.5	365	60.2
No answer to entire question	3	8.1	1	.6	1	.7	1	1.0	..	..	..	..	..	..	..	..	3	27.3	9	1.5
Total	37	100.0	170	100.1	153	100.2	104	100.0	78	100.1	23	100.0	18	100.0	12	100.0	11	100.1	606	100.1

APPENDIX H--Continued

TABLE 61.--DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING SATISFACTORY COMPLETION OF COURSES NECESSARY FOR TUITION AID BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you specify that the course must be satisfactorily completed before the clerical office worker will receive reimbursement for the course?")

Satisfactory Course Completion	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	..	..	..	..	64	26.3	11	38.0	7	9.5	8	14.3	62	43.7	8	17.4	161	26.6
Satisfactorily completed	1	50.0	..	..	..	..	56	23.3	11	38.0	5	6.8	8	14.3	60	42.3	8	17.4	149	24.6
B or better	..	..	..	..	..	..	3	1.2	..	..	1	1.4	..	..	1	.7	..	..	5	.8
Graded scale	..	..	..	..	..	..	5	2.1	..	..	1	1.4	..	..	1	.7	..	..	7	1.2
No, only attendance	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	..	..	..	..	1	.2
No, but no further aid given	..	..	..	..	..	..	5	2.1	..	..	..	..	..	..	2	1.4	..	..	7	1.2
No	..	..	..	..	..	..	12	4.9	1	3.4	4	5.4	2	3.6	35	24.6	3	6.5	57	9.4
No answer to this part of question	..	..	..	..	..	..	1	.4	..	..	1	1.4	..	..	1	.7	..	..	3	.5
Tuition aid program being planned	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	1	2.2	2	.3
Does not apply (provides no aid)	1	50.0	1	50.0	12	100.0	154	63.4	17	58.6	60	81.1	46	82.1	41	28.9	33	71.7	365	60.2
No answer to entire question	..	..	1	50.0	..	..	5	2.1	..	..	2	2.7	..	..	..	..	1	2.2	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.0	29	100.0	74	100.1	56	100.0	142	100.0	46	100.0	606	99.9

APPENDIX H—Continued

TABLE 62.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING LENGTH OF EMPLOYMENT NECESSARY FOR TUITION AID ELIGIBILITY BY CLERICAL SIZE OF OFFICE, 1963–1964

("Must the employee be with the firm for any length of time before becoming eligible for tuition reimbursement?")

Employee Longevity for Tuition Aid	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	28	16.5	26	17.0	23	22.1	26	33.3	7	30.4	6	33.3	3	25.0	2	18.2	121	20.0
Did not describe	..	..	8	4.7	7	4.6	2	1.9	4	5.1	3	13.0	1	5.6	..	..	2	18.2	27	4.5
No set policy	..	..	..	..	2	1.3	..	..	..	..	..	..	1	5.6	..	..	..	..	3	.5
1 month	..	..	..	..	..	..	1	1.0	1	1.3	..	..	..	..	..	..	..	..	2	.3
2 months	..	..	2	1.2	..	..	..	..	..	..	..	..	..	..	..	..	..	..	2	.3
3 months	..	..	4	2.4	2	1.3	6	5.8	6	7.7	1	4.3	1	5.6	1	8.3	..	..	21	3.5
4 months	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.2
6 months	..	..	4	2.4	7	4.6	3	2.9	5	6.4	1	4.3	1	5.6	1	8.3	..	..	22	3.6
1 year	..	..	5	2.9	4	2.6	5	4.8	6	7.7	1	4.3	1	5.6	1	8.3	..	..	23	3.8
2 years	..	..	..	..	..	..	2	1.9	..	..	..	..	..	..	..	..	..	..	2	.3
5 years	..	..	1	.6	..	..	..	..	..	..	..	..	..	..	..	..	..	..	1	.2
Individual basis	..	..	2	1.2	2	1.3	2	1.9	1	1.3	..	..	..	..	..	..	..	..	7	1.2
Employee in good standing, permanent employee	..	..	..	..	2	1.3	1	1.0	..	..	..	..	1	5.6	..	..	..	..	4	.7
Department approval	..	..	1	.6	..	..	1	1.0	3	3.8	1	4.3	..	..	..	..	..	..	6	1.0
No	..	..	29	17.1	18	11.8	25	24.0	16	20.5	6	26.1	2	11.1	5	41.7	..	..	101	16.7
No answer to this part of question	..	..	2	1.2	3	2.0	1	1.0	..	..	..	..	..	..	..	..	1	9.1	7	1.2
Tuition aid program being planned	..	..	..	..	1	.7	..	..	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
Does not apply (provides no aid)	34	91.9	110	64.7	104	68.0	54	51.9	35	44.9	10	43.5	9	50.0	4	33.3	5	45.5	365	60.2
No answer to entire question	3	8.1	1	.6	1	.7	1	1.0	..	..	..	..	..	..	..	..	3	27.3	9	1.5
Total	37	100.0	170	100.1	153	100.2	104	100.0	78	100.0	23	100.0	18	100.0	12	100.0	11	100.1	606	100.1

APPENDIX H—Continued

TABLE 63.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING LENGTH OF EMPLOYMENT NECESSARY FOR TUITION AID ELIGIBILITY BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Must the employee be with the firm for any length of time before becoming eligible for tuition reimbursement?")

Employee Longevity for Tuition Aid	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	50.0	..	..	..	..	52	21.4	10	34.5	7	9.5	5	8.9	37	26.1	9	19.6	121	20.0
Did not describe	..	..	..	..	..	..	12	4.9	..	..	1	1.4	3	5.4	9	6.3	2	4.4	27	4.5
No set policy	..	..	..	..	..	..	1	.4	..	..	1	1.4	1	1.8	..	..	..	..	3	.5
1 month	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	..	..	1	2.2	2	.3
2 months	..	..	..	..	..	..	1	.4	1	3.4	..	..	..	..	..	..	..	..	2	.3
3 months	..	..	..	..	..	..	11	4.5	1	3.4	..	..	..	..	9	6.3	..	..	21	3.5
4 months	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	..	..	..	..	1	.2
6 months	..	..	..	..	..	..	6	2.5	5	17.2	..	..	..	..	8	5.6	3	6.5	22	3.6
1 year	1	50.0	..	..	..	..	12	4.9	3	10.3	2	2.7	1	1.8	3	2.1	1	2.2	23	3.8
2 years	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	..	..	2	.3
5 years	..	..	..	..	..	..	..	..	..	..	1	1.4	..	..	..	..	..	..	1	.2
Individual basis	..	..	..	..	..	..	4	1.6	..	..	..	..	..	..	2	1.4	1	2.2	7	1.2
Employee in good standing, permanent employee	..	..	..	..	..	..	1	.4	..	..	2	2.7	..	..	..	..	1	2.2	4	.7
Department approval	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	5	3.5	..	..	6	1.0
No	..	..	..	..	..	..	28	11.5	2	6.9	4	5.4	4	7.1	62	43.7	1	2.2	101	16.7
No answer to this part of question	..	..	..	..	..	..	3	1.2	..	..	1	1.4	1	1.8	1	.7	1	2.2	7	1.2
Tuition aid program being planned	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	1	.7	1	2.2	3	.5
Does not apply (provides no aid)	1	50.0	1	50.0	12	100.0	154	63.4	17	58.6	60	81.1	46	82.1	41	28.9	33	71.7	365	60.2
No answer to entire question	..	..	1	50.0	..	..	5	2.1	..	..	2	2.7	..	..	..	..	1	2.2	9	1.5
Total	2	100.0	2	100.0	12	100.0	243	100.0	29	100.0	74	100.1	56	99.9	142	100.1	46	100.1	606	100.1

TABLE 64.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING PLANS TO OFFER OTHER TRAINING FOR CLERICAL OFFICE WORKERS IN THE NEAR FUTURE BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you plan to offer any other company training for clerical office workers in the near future?")

Plans for Additional Training	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	5	2.9	7	4.6	19	18.3	6	7.7	5	21.7	7	38.9	7	58.3	2	18.2	58	9.6
Subject																				
Company policies and procedures	..	..	1	.6	1	.7	5	4.8	2	2.6	1	4.3	..	..	..	..	1	9.1	11	1.8
Data processing	..	..	2	1.2	2	1.3	6	5.8	1	1.3	..	..	..	..	..	..	1	9.1	12	2.0
Skill subjects	..	..	..	..	..	..	6	5.8	2	2.6	6	26.1	5	27.8	4	33.3	..	..	23	3.8
Supervisory training	..	..	..	..	..	..	1	1.0	1	1.3	..	..	1	5.6	..	..	..	..	3	.5
Other courses	..	..	..	..	..	..	..	..	2	2.6	1	4.3	1	5.6	1	8.3	..	..	5	.8
Subject to be determined	..	..	2	1.2	4	2.6	3	2.9	..	..	1	4.3	2	11.1	2	16.7	..	..	14	2.3
Possibly	1	2.7	3	1.8	5	3.3	2	1.9	5	6.4	1	4.3	..	..	1	8.3	..	..	18	3.0
Data processing	..	..	1	.6	1	.7	2	1.9	..	..	..	..	..	..	..	..	..	..	4	.7
Don't know	..	..	3	1.8	4	2.6	..	..	3	3.8	1	4.3	..	..	..	..	..	..	11	1.8
No plans	24	64.9	98	57.6	131	85.6	81	77.9	64	82.1	15	65.2	11	61.1	4	33.3	8	72.8	436	71.9
No answer	12	32.4	61	35.9	6	3.9	2	1.9	..	..	1	4.3	..	..	..	..	1	9.1	83	13.7
Total	37	100.0	170	100.0	153	100.0	104	100.0	78	100.0	23	99.8	18	100.0	12	99.9	11	100.1	606	100.0

APPENDIX H—Continued

TABLE 65.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING PLANS TO OFFER OTHER TRAINING FOR CLERICAL OFFICE WORKERS IN THE NEAR FUTURE BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you plan to offer any other company training for clerical office workers in the near future?")

Plans for Additional Training	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	..	..	..	..	23	9.5	6	20.7	3	4.1	4	7.1	18	12.7	3	8.7	58	9.6
Subject																				
Company policies and procedures	..	..	..	..	..	..	4	1.6	..	..	..	..	2	3.6	5	3.5	..	..	11	1.8
Data processing	..	..	..	..	..	..	6	2.5	..	..	2	2.7	1	1.8	2	1.4	1	2.2	12	2.0
Skill subjects	..	..	..	..	..	..	5	2.1	4	13.8	..	..	1	1.8	11	7.7	2	4.3	23	3.8
Supervisory training	..	..	..	..	..	..	1	.4	1	3.4	..	..	..	..	1	.7	..	..	3	.5
Other courses	..	..	..	..	..	..	1	.4	..	..	..	..	..	..	4	2.8	..	..	5	.8
Subject to be determined	..	..	..	..	..	..	8	3.3	2	6.9	1	1.4	..	..	2	1.4	1	2.2	14	2.3
Possibly	..	..	..	..	..	..	9	3.7	..	..	3	4.1	2	3.6	3	2.1	1	2.2	18	3.0
Data processing	..	..	..	..	..	..	2	.8	..	..	2	2.7	..	..	..	..	..	..	4	.7
Don't know	..	..	..	..	..	..	8	3.3	1	3.4	..	..	..	..	1	.7	1	2.2	11	1.8
No plans	2	100.0	1	50.0	11	91.7	144	59.3	21	72.4	65	87.8	49	87.5	109	76.7	34	73.9	436	71.9
No answer	..	..	1	50.0	1	8.3	59	24.3	1	3.4	3	4.1	1	1.8	11	7.7	6	13.0	83	13.7
Total	2	100.0	2	100.0	12	100.0	243	100.1	29	99.9	74	100.1	56	100.0	142	99.9	46	100.0	606	100.0

APPENDIX H—Continued

TABLE 68.—DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING FUTURE CLERICAL TRAINING NEEDS BY CLERICAL SIZE OF OFFICE, 1963–1964

("Do you think the clerical office workers in your company should have or will need any type of company training in the near future?")

Future Training Needs	Size of Office																			
	1–3		4–19		20–49		50–99		100–249		250–499		500–999		1,000 & Over		No Ans. Re Size		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	1	2.7	25	14.7	39	25.5	34	32.7	30	38.5	15	60.9	12	66.7	11	91.7	2	18.2	169	27.7
Subject																				
Company policies and procedures	..	..	9	5.3	5	3.3	6	5.8	6	7.7	2	8.7	..	..	..	..	..	..	28	4.6
Data processing	..	..	11	6.5	12	7.8	15	14.4	6	7.7	3	13.0	5	27.8	..	..	1	9.1	53	8.6
Skill subjects	1	2.7	3	1.8	4	2.6	8	7.7	7	9.0	7	30.4	5	27.8	5	41.7	..	..	40	6.6
Subject not specified	..	..	4	2.4	19	12.4	6	5.8	11	14.1	4	17.4	2	11.1	6	50.0	1	9.1	53	8.6
Possibly	..	..	6	3.5	5	3.3	5	4.8	2	2.6	4	17.4	4	22.2	..	..	1	9.1	27	4.5
Data processing	..	..	3	1.8	1	.7	1	1.0	1	1.3		..	1	5.6	..	..	1	9.1	8	1.3
Skill subjects	..	..	..	..	..	..	..	..	..	..	1	4.3	..	..	..	..	..	..	1	.2
Don't know	2	5.4	6	3.5	9	5.9	4	3.8	3	3.8	..	..	..	..	..	..	..	..	24	4.0
Data processing	..	..	2	1.2	1	.7	1	1.0	..	..	..	..	..	..	..	..	..	..	4	.7
None	27	73.0	118	69.4	82	53.6	47	45.2	32	41.0	4	17.4	1	5.6	1	8.3	6	54.5	318	52.5
No answer	7	18.9	15	8.8	18	11.8	14	13.5	11	14.1	1	4.3	1	5.6	..	..	2	18.2	69	11.4
Total	37	100.0	170	99.9	153	100.1	104	100.0	78	100.0	23	100.0	18	100.1	12	100.0	11	100.0	606	100.0

APPENDIX H–Continued

TABLE 67.–DISTRIBUTION OF RESPONSES TO QUESTION CONCERNING FUTURE CLERICAL TRAINING NEEDS BY INDUSTRIAL CLASSIFICATION, 1963–1964

("Do you think the clerical office workers in your company should have or will need any type of company training in the near future?")

Future Training Needs	Industrial Classification																			
	Agric		Mining		Constr		Manuf		Utilities		Wholesale Trade		Retail Trade		Finance		Services		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
Yes	..	..	..	..	1	8.3	58	23.9	7	24.1	21	28.4	13	23.2	58	40.8	11	23.9	169	27.7
Subject		..																		
Company policies and procedures	..	..	..	..	..	..	9	3.7	1	3.4	3	4.1	2	3.6	12	8.5	1	2.2	28	4.6
Data processing	..	..	..	..	1	8.3	23	9.5	..	..	11	4.9	1	1.8	14	9.9	3	6.5	53	8.6
Skill subjects	..	..	..	..	..	..	9	3.7	5	17.2	1	1.4	2	3.6	17	12.0	6	13.0	40	6.6
Subject not specified	..	..	..	..	..	..	20	8.2	1	3.4	6	8.1	8	14.3	16	11.3	2	4.3	53	8.6
Possibly	..	..	..	..	..	..	9	3.7	3	10.3	1	1.4	6	10.7	5	3.5	2	4.3	27	4.5
Data processing	..	..	..	..	..	..	2	.8	2	6.9	..	..	3	5.4	1	.7	..	..	8	1.3
Skill subjects	..	..	..	..	..	..	..	..	..	..	..	..	1	1.8	..	..	..	..	1	.2
Don't know	..	..	..	..	..	..	10	4.1	..	..	7	9.5	3	5.4	4	2.8	..	..	24	4.0
Data processing	..	..	..	..	..	..	..	..	..	..	3	4.1	..	..	1	.7	..	..	4	.7
None	1	50.0	1	50.0	10	83.3	135	55.6	16	55.2	43	58.1	29	51.8	59	41.5	24	52.2	318	52.5
No answer	1	50.0	1	50.0	1	8.3	31	12.8	3	10.3	2	2.7	5	8.9	16	11.3	9	19.6	69	11.4
Total	2	100.0	2	100.0	12	99.9	243	100.1	29	99.9	74	100.1	56	100.0	142	99.9	46	100.0	606	100.1

APPENDIX I

SIMILAR OR COMPARABLE TITLES

GROUPED UNDER A COMMON TITLE IN TABLE 17

Common Title	Similar or Comparable Titles
Administration Director	Administrative Manager, Director of Administration
Assistant Personnel Director	Assistant Director Industrial Relations
Assistant Treasurer	Assistant Comptroller
Department Head	Accounting Manager of Division, Accounting Operations Manager, Accounting Supervisor, Branch Manager, Department Executive Accountant, Department Manager, Department Officers, Department Supervisor, District Manager, General Manager, Head Teller
Office Manager	Assistant Comptroller and Office Manager, Manager Office Division, Office Administrator, Office Cashier, Office Personnel Manager, Office Manager and Assistant Vice President, Personnel and Office Manager, Regional Office Supervisor, Supervisor of Office Services
Officer	Trust Officer
Personnel Director	Director of Employee Relations, Director of Personnel, Director of Personnel Relations, Employment Interviewer, Employment Manager, Industrial Relations Director, Labor Relations and Personnel Manager, Office Operations Manager, Personnel Director and Assistant Vice President, Personnel Manager, Personnel and Office Manager, Personnel Vice President, Supervisor and Director of Personnel Training
President	Owner

APPENDIX I--Continued

Common Title	Similar or Comparable Titles
Supervisor	Accountant, Assistant Supervisor, Immediate Supervisor
Training Director	Assistant Secretary of Company Training and Management, Co-ordinator of Employment Development, Co-ordinator of Training and Development, Group Leader of Secretarial Services Training, Manager Industrial Training, Office Methods and Training Director, Secretary in Charge of Education, Supervisor of Training Pool, Supervisor of Training and Safety, Training Administrator, Training Co-ordinator, Training Manager
Treasurer	Comptroller, Controller

APPENDIX J

CHI-SQUARE ANALYSES OF SAMPLE AND POPULATION

Chi-square analysis for goodness of fit was used to determine whether there was any significant difference between the distribution of the sample and that of the population. The following null hypotheses were formulated and tested:

1. No significant difference exists between the distribution of the sample and that of the population[1] containing companies employing four and over employees with regard to company size.[2]

2. No significant difference exists between the distribution of the sample and that of the population containing companies employing four and over employees with regard to type of company.[2]

3. No significant difference exists between the distribution of the sample and that of the population containing companies employing 100 and over employees with regard to company size.[2]

4. No significant difference exists between the distribution of the sample and that of the population containing companies employing 100 and over employees with regard to type of company.[2]

5. No significant difference exists between the distribution of the sample and that of the population containing companies employing 250 and over employees with regard to company size.[2]

6. No significant difference exists between the distribution of the sample and that of the population containing companies employing 250 and over employees with regard to type of company.[2]

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[1]Population data have been adjusted for fluctuations of employment occurring between the time data were collected by the Massachusetts Division of Employment Security and the time data were collected for this study.

[2]Rejected at the 5 per cent level of significance.

APPENDIX J--Continued

7. No significant difference exists between the distribution of the sample and that of the population containing companies employing 500 and over employees with regard to company size.[3]

8. No significant difference exists between the distribution of the sample and that of the population containing companies employing 500 and over employees with regard to type of company.[3]

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[3]Accepted at the 5 per cent level of significance.

APPENDIX J--Continued

Computation of chi-square analysis is given below for each null hypothesis:

TABLE 68.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 4 and Over Employees by Size of Company, Null Hypothesis No. 1[a]

Size of Company	Population No.	Population %	Sample f_i	Sample F_i	(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
4-19	18,590	75.5	68	508.1	-440.1	193,688.01	381.201
20-49	3,677	14.9	81	100.3	-19.3	372.49	3,714
50-99	1,311	5.3	97	35.7	61.3	3,757.69	105.257
100-249 . . .	679	2.8	161	18.8	142.2	20,220.84	1,075.577
250-499 . . .	200	.8	120	5.4	114.6	13,133.16	2,432.067
500-999 . . .	93	.4	64	2.7	61.3	3,757.69	1,391.737
1,000 and over .	76	.3	82	2.0	80.0	6,400.00	3,200.000
Total.	24,626	100.0	673	673.0			
Chi Square . . .							8,589.553*

TABLE 69.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 4 and Over Employees by Industrial Classification, Null Hypothesis No. 2[a]

Industrial Classification	Population No.	Population %	Sample f_i	Sample F_i	(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
Agriculture. . .	160	.6	2	4.0	-2.0	4.00	1.000
Mining	20	.1	2	.7	1.3	1.69	2.414
Construction . .	2,066	8.4	13	56.5	-43.5	1,892.25	33.491
Manufacturing. .	3,942	16.0	267	107.7	159.3	25,376.49	235.622
Utilities. . . .	1,163	4.7	30	31.6	-1.6	2.56	.081
Wholesale Trade.	3,182	12.9	92	86.8	5.2	27.04	.312
Retail Trade . .	7,837	31.8	62	214.0	-152.0	23,104.00	107.963
Finance.	1,668	6.8	150	45.8	104.2	10,857.64	237.066
Services	4,588	18.6	55	125.2	-70.2	4,928.04	39.361
Total.	24,626	99.9	673	673.0			
Chi Square . . .							657.310*

[a]Data taken from Appendix G, Tables 41 and 43.

*Significant beyond 5 per cent level.

APPENDIX J--Continued

TABLE 70.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 100 and Over Employees by Size of Company, Null Hypothesis No. 3[a]

Size of Company	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
100-249. . .	679	64.8	161	276.7	-115.7	13,386.49	48.379
250-499. . .	200	19.1	120	81.6	38.4	1,474.56	18.070
500-999. . .	93	8.9	64	38.0	26.0	676.00	17.789
1,000 and over	76	7.3	82	31.2	50.8	2,580.64	82.713
Total.	1,048	100.1	427	427.5			
Chi Square . .							166.951*

TABLE 71.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 100 and Over Employees by Industrial Classification, Null Hypothesis No. 4[a]

Industrial Classification	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
Agriculture. .	1	.1	1	.4	.6	.36	.900
Mining	..	..	..	..	..	..	..
Construction .	33	3.1	9	13.4	-4.2	17.64	1.336
Manufacturing.	445	42.5	234	181.5	52.5	2,756.25	15.186
Utilities. . .	78	7.4	24	31.6	-7.6	57.76	1.828
Wholesale Trade	94	9.0	35	38.4	-3.4	11.56	.301
Retail Trade .	167	15.9	35	67.9	-32.9	1,082.41	15.941
Finance. . . .	104	9.9	59	42.3	16.7	278.89	6.593
Services . . .	126	12.0	30	51.2	-21.2	449.44	8.778
Total.	1,048	99.9	427	426.5			
Chi Square . .							50.863*

[a]Data taken from Appendix G, Tables 41 and 43.
*Significant beyond 5 per cent level.

APPENDIX J--Continued

TABLE 72.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 250 and Over Employees by Size of Company, Null Hypothesis No. 5[a]

Size of Company	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
250-499 . . .	200	54.2	120	144.2	-24.2	585.64	4.061
500-999 . . .	93	25.2	64	67.0	-3.0	9.00	.134
1,000 and over .	76	20.6	82	54.8	27.2	739.84	13.500
Total.	369	100.0	266	266.0			
Chi Square . . .							17.695*

TABLE 73.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 250 and Over Employees by Industrial Classification, Null Hypothesis No. 6[a]

Industrial Classification	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
Agriculture. . .	..	..	..	..	..	..	..
Mining	..	..	..	..	..	..	..
Construction . .	7	1.9	5	5.1	-.1	.01	.002
Manufacturing. .	186	50.4	160	134.1	25.9	670.81	5.002
Utilities. . . .	32	8.7	13	23.1	-10.1	102.01	4.416
Wholesale Trade.	20	5.4	11	14.4	-3.4	11.56	.803
Retail Trade . .	56	15.2	31	40.4	-9.4	88.36	2.188
Finance.	32	8.7	28	23.1	4.9	24.01	1.039
Services	36	9.8	18	26.1	-8.1	65.61	2.514
Total.	369	100.1	266	266.3			
Chi Square . .							15.964*

[a]Data taken from Appendix G, Tables 41 and 43.

*Significant beyond 5 per cent level.

APPENDIX J--Continued

TABLE 74.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 500 and Over Employees by Size of Company, Null Hypothesis No. 7[a]

Size of Company	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
500-999. . . .	87	51.5	64	75.2	-11.2	125.44	1.668
1,000 and over .	82	48.5	82	70.8	11.2	125.44	1.772
Total.	169	100.0	146	146.0			
Chi Square . . .							3.440

TABLE 75.--Chi-Square Test for Significance of Differences Between Sample and Population Frequencies for Companies with 500 and Over Employees by Industrial Classification, Null Hypothesis No. 8[a]

Industrial Classification	Population		Sample		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
Agriculture. . .	..	..	..	..	..	..	..
Mining	..	..	..	..	..	..	..
Construction . .	2	1.2	3	1.8	1.2	1.44	.800
Manufacturing. .	87	51.5	86	75.2	10.8	116.64	1.551
Utilities. . . .	17	10.1	10	14.7	-4.7	22.09	1.503
Wholesale Trade.	7	4.1	2	6.0	-4.0	16.00	2.667
Retail Trade . .	27	16.0	21	23.4	-2.4	5.76	.246
Finance.	19	11.2	15	16.4	-1.4	1.96	.120
Services	10	5.9	9	8.6	.4	.16	.019
Total.	169	100.0	146	146.1			
Chi Square . . .							6.906

[a]Data taken from Appendix G, Tables 41 and 43.

APPENDIX K--Continued

Computation of chi-square analysis is given below for each null hypothesis

TABLE 76.--Chi-Square Test for Significance of Differences Between Questionnaires Mailed and Questionnaires Completed by Size of Company, Null Hypothesis No. 1[a]

Size of Company	Sample		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
1-3. . . .	4	.6	2	3.6	-1.6	2.56	.711
4-19 . . .	68	10.1	51	61.2	-10.2	104.04	1.700
20-49 . . .	81	12.0	75	72.7	2.3	5.29	.086
50-99 . . .	97	14.3	82	86.7	-4.7	22.09	.255
100-249 . .	161	23.8	147	144.2	2.8	7.84	.054
250-499 . .	120	17.7	113	107.3	5.7	32.49	.303
500-999 . .	64	9.5	59	57.6	1.4	1.96	.034
1,000 and over	82	12.1	77	73.3	3.7	13.69	.187
Total.	677	100.1	606	606.0			
Chi Square . .							3.330

TABLE 77.--Chi-Square Test for Significance of Differences Between Questionnaires Mailed and Questionnaires Completed, Incomplete Questionnaires, Letters, and Telephone Calls by Size of Company, Null Hypothesis No. 2[b]

Size of Company	Sample		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
1-3. . . .	4	.6	4	3.9	.1	.01	.003
4-19 . . .	68	10.1	63	65.1	-2.1	4.41	.068
20-49 . . .	81	12.0	79	77.4	1.6	2.56	.033
50-99 . . .	97	14.3	92	92.2	-.2	.04	.000
100-249 . .	161	23.8	151	153.5	-2.5	6.25	.041
250-499 . .	120	17.7	117	114.2	2.8	7.84	.069
500-999 . .	64	9.5	60	61.3	-1.3	1.69	.028
1,000 and over	82	12.1	79	78.0	.1	.01	.000
Total.	677	100.1	645	645.6			
Chi Square . .							.242

[a]Data taken from Appendix G, Tables 41 and 46.
[b]Data taken from Appendix G, Tables 41 and 44.

APPENDIX K

CHI-SQUARE ANALYSES OF

QUESTIONNAIRE RESPONDENTS AND SAMPLE

Chi-square analysis for goodness of fit was used to determine whether there was any significant difference between the distribution of the questionnaire respondents and that of the sample. The following null hypotheses were formulated and tested:

1. No significant difference exists between the distribution of 606 respondents and that of the sample of 677 companies with respect to company size.[1]

2. No significant difference exists between the distribution of 645 respondents providing complete or limited data and that of the sample of 677 companies with respect to company size.[1]

3. No significant difference exists between the distribution of 606 respondents and that of the sample of 677 companies with respect to type of company.[1]

4. No significant difference exists between the distribution of 645 respondents providing complete or limited data and that of the sample of 677 companies with respect to type of company.[1]

---

[1]Accepted at the 5 per cent level of significance.

APPENDIX K--Continued

TABLE 78.--Chi-Square Test for Significance of Differences Between Questionnaires Mailed and Questionnaires Completed by Industrial Classification, Null Hypothesis No. 3[a]

Industrial Classification	Sample		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(fi-Fi)^2}{Fi}$
	No.	%	f_i	F_i			
Agriculture. . .	2	.3	2	1.8	.2	.04	.018
Mining	2	.3	2	1.8	.2	.04	.018
Construction . .	13	1.9	12	11.6	.4	.16	.011
Manufacturing. .	267	39.4	243	239.0	4.0	16.00	.067
Utilities. . . .	30	4.4	29	26.9	2.2	4.84	.172
Wholesale Trade.	92	13.6	74	82.4	-8.4	70.56	.849
Retail Trade . .	63	9.3	56	56.4	-.4	.16	.003
Finance.	151	22.3	142	135.1	6.9	47.61	.348
Services	57	8.4	46	51.0	-5.0	25.00	.496
Total.	677	99.9	606	606.0			
Chi Square . . .							1.982

TABLE 79.--Chi-Square Test for Significance of Differences Between Questionnaires Mailed and Questionnaires Completed, Incomplete Questionnaires, Letters, and Telephone Calls by Industrial Classification, Null Hypothesis No. 4[b]

Industrial Classification	Sample		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
Agriculture. . .	2	.3	2	1.9	.1	.01	.002
Mining	2	.3	2	1.9	.1	.01	.002
Construction . .	13	1.9	12	12.4	-.4	.16	.012
Manufacturing. .	267	39.4	254	254.4	-.4	.16	.001
Utilities. . . .	30	4.4	29	28.6	.4	.16	.007
Wholesale Trade.	92	13.6	90	87.7	2.3	5.29	.063
Retail Trade . .	63	9.3	60	60.1	-.1	.01	.000
Finance.	151	22.3	143	143.8	-.8	.64	.005
Services	57	8.4	53	54.3	-1.3	1.69	.032
Total.	677	99.9	645	645.1			
Chi Square . . .							.124

[a]Data taken from Appendix G, Tables 41 and 46.

[b]Data taken from Appendix G, Tables 41 and 44.

APPENDIX L

CHI-SQUARE ANALYSES OF

QUESTIONNAIRE RESPONDENTS AND POPULATION

Chi-square analysis for goodness of fit was used to determine whether there was any significant difference between the distribution of the questionnaire respondents and that of the population containing 500 and over employees. The following null hypotheses were formulated and tested:

1. No significant difference exists between the distribution of 606 respondents and that of the population[1] containing 500 and over employees with respect to company size.[2]

2. No significant difference exists between the distribution of 606 respondents and that of the population containing 500 and over employees with respect to type of company.[2]

---

[1]Population data have been adjusted for fluctuations of employment occurring between the time data were collected by the Massachusetts Division of Employment Security and the time data were collected for the study.

[2]Accepted at the 5 per cent level of significance.

APPENDIX L--Continued

Computation of chi-square analysis is given below for each null hypothesis

TABLE 80.--Chi-Square Test for Significance of Differences Between 606 Questionnaire Respondents and Population Frequencies for Companies with 500 and Over Employees by Size of Company, Null Hypothesis No. 1[a]

Size of Company	Population		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
500-999. . . .	87	51.5	59	70.0	-11.0	121.00	1.729
1,000 and over .	82	48.5	77	66.0	11.0	121.00	1.833
Total.	169	100.0	136	136.0			
Chi Square . . .							3.562

TABLE 81.--Chi-Square Test for Significance of Differences Between 606 Questionnaire Respondents and Population Frequencies for Companies with 500 and Over Employees by Industrial Classification, Null Hypothesis No. 2[a]

Industrial Classification	Population		Respondents		(f_i-F_i)	$(f_i-F_i)^2$	$\frac{(f_i-F_i)^2}{F_i}$
	No.	%	f_i	F_i			
Agriculture. . .	..	..	..	..	..	..	..
Mining	..	..	..	..	..	..	..
Construction . .	2	1.2	3	1.6	1.4	1.96	1.225
Manufacturing. .	87	51.5	77	70.0	7.0	49.00	.700
Utilities. . . .	17	10.1	10	13.7	-3.7	13.69	.999
Wholesale Trade.	7	4.1	2	5.6	-3.6	12.96	2.314
Retail Trade . .	27	16.0	20	21.8	-1.8	3.24	.149
Finance.	19	11.2	15	15.2	-.2	.04	.003
Services	10	5.9	9	8.0	1.0	1.00	.120
Total.	169	100.0	136	135.9			5.510

[a]Data taken from Appendix G, Tables 42 and 46.

APPENDIX M

CHI-SQUARE ANALYSES OF COMPANIES WITH AND THOSE WITHOUT FORMAL TRAINING PRACTICES

Chi-square analysis was used to test the existence of any relationship between certain variables and the use of formal training practices for clerical employees. Variables that were included were: (1) total size of company, (2) clerical size of company, and (3) type of company. The following null hypotheses were formulated and tested:

1. No significant relationship exists between the use of formal training practices by companies employing under 250 total employees as compared with those employing 250 and over total employees.[1]

2. No significant relationship exists between the use of formal training practices by companies employing under 500 total employees as compared with those employing 500 and over total employees.[1]

3. No significant relationship exists between the use of formal training practices by companies employing under 250 clerical employees as compared with those employing 250 and over clerical employees.[1]

4. No significant relationship exists between the use of formal training practices by companies employing under 500 clerical employees as compared with those employing 500 and over clerical employees.[1]

5. No significant relationship exists between the use of formal training practices and type of company.[1]

---

[1]Rejected at the 5 per cent level of significance.

APPENDIX M--Continued

TABLE 82.--Companies With and Without Formal Training Practices Employing Under 250 Employees Compared with Those Employing 250 and Over Employees, Null Hypothesis No. 1[a]

Total Employee Size of Company	Formal Training	No Formal Training	Total
Under 250.	6	383	389
250 and over	35	221	256
Total.	41	604	645
Chi Square[b].			36.150*

[a]Data taken from Table 20, part A
[b]Yates correction was applied.
*Significant beyond 5 per cent level.

TABLE 83.--Companies With and Without Formal Training Practices Employing Under 500 Employees Compared with Those Employing 500 and Over Employees, Null Hypothesis No. 2[a]

Total Employee Size of Company	Formal Training	No Formal Training	Total
Under 500.	13	493	506
500 and over	28	111	139
Total.	41	604	645
Chi Square[b].			53.668*

[a]Data taken from Table 20, part A
[b]Yates correction was applied.
*Significant beyond 5 per cent level.

APPENDIX M--Continued

TABLE 84.--Companies With and Without Formal Training Practices Employing Under 250 Clerical Employees Compared with Those Employing 250 and Over Clerical Employees, Null Hypothesis No. 3[a]

Clerical Employee Size of Company	Formal Training	No Formal Training	Total
Under 250.	13	578	591
250 and over	28	26	54
Total.	41	604	645
Chi Square[b].			196.669*

[a]Data taken from Table 21, part A
[b]Yates correction was applied.
*Significant beyond 5 per cent level.

TABLE 85.--Companies With and Without Formal Training Practices Employing Under 500 Clerical Employees Compared with Those Employing 500 and Over Clerical Employees, Null Hypothesis No. 4[a]

Clerical Employee Size of Company	Formal Training	No Formal Training	Total
Under 500.	22	593	615
500 and over	19	11	30
Total.	41	604	645
Chi Square[b].			161.701*

[a]Data taken from Table 21, part A
[b]Yates correction was applied.
*Significant beyond 5 per cent level.

APPENDIX M--Continued

TABLE 86.--Companies With and Without Formal Training Practices by Industrial Classification, Null Hypothesis No. 5[a]

Industrial Classification	Formal Training No.	Formal Training χ^2	No Formal Training No.	No Formal Training χ^2	Total
Agriculture.	0	.100	2	.005	2
Mining	0	.100	2	.005	2
Construction	0	.800	12	.057	12
Manufacturing. . . .	8	4.075	246	.283	254
Utilities.	3	.800	26	.053	29
Wholesale Trade. . .	1	3.875	89	.262	90
Retail Trade	4	.011	56	.001	60
Finance.	20	13.056	123	.887	143
Services	5	.753	48	.052	53
Total.	41		604		645
Chi Square					25.175*

[a]Data taken from Table 22, part A

*Significant beyond 5 per cent level.

APPENDIX N

ABBREVIATIONS USED IN TABLES

adm	administration	manuf	manufacturing
agric	agriculture	mgr	manager
ans	answer	nonsupvs	nonsupervisors
asst	assistant	off	office
atty	attorney	offr	officer
bkg	banking	OJT	on-the-job training
bus	business	opns	operations
chf	chief	pers	personnel
com	communication	PR	public relations
comptr	comptroller	preds	predecessors
constr	construction	pres	president
dept	department	re	regarding
dir	director	repr	representative
educ	education	sectl	secretarial
exc	excluding	secy(s)	secretary, secretaries
exec	executive	stenos	stenographers
fish	fisheries	supv(r)	supervisor
forest	forestry	svc(s)	service(s)
gen	general	tng	training
grads	graduates	trans	transportation
hd(s)	head(s)	treas	treasurer
incl	including	univ	university
ind	industry	utls	utilities
indiv	individual	whsle	wholesale

---

[1]Main Sources: Philip Babcock Grove and The Merriam-Webster Editorial Staff (ed.), Webster's Third New International Dictionary of the English Language Unabridged (Springfield, Massachusetts: G. & C. Merriam Company, Publishers, 1961); Robert J. Schwartz, The Complete Dictionary of Abbreviations (New York: Thomas Y. Crowell Company, 1955).

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ABSTRACT

ANALYSIS OF IN-COMPANY AND OUT-OF-COMPANY
EDUCATIONAL AND TRAINING PRACTICES FOR CLERICAL WORKERS
OF LEADING FIRMS IN THE GREATER BOSTON AREA

by

Eleanor Hollis Tedesco

The Problem

The problem of this study was concerned with (1) the present and future status of company training for clerical workers among firms in the Greater Boston area, (2) descriptions of formal training programs that these companies provide for their clerical workers, and (3) descriptions of formal training programs conducted by out-of-company agencies that these companies reported using in training their clerical workers.

Procedures

Data concerning present and future training practices were obtained from managerial personnel representing 645 companies responding by mail or by telephone to a questionnaire, with 606 companies providing usable mail questionnaires. Items studied involved training methods, tuition aid practices, and future training plans and needs. These data were reported in statistical summaries classified by each company's industry, total employee size, and/or clerical employee size.

Data concerning the structure of formal training programs for clerical employees were obtained from personal interviews with personnel in charge of administering and/or instructing in the

clerical training function, supplemented by observing and/or participating as a trainee in training sessions and by using printed or office duplicated materials supplied by interviewees. Thirty-eight companies with these programs were selected for case analysis. Each case study generally included an overview of a company's clerical training function; a description of its in-company formal clerical training activities according to purpose, administration and organization, objectives, content, and implementation; and a description of its out-of-company training activities according to tuition aid practices and other outside agencies utilized in training clerical workers. Twelve out-of-company agencies that companies reported using in training their clerical workers were also selected for case analysis. Each of these case studies described an out-of-company agency in terms of its function(s) and training activities being offered and/or planned for clerical workers. Volume I contains the problem and findings of the study; Volume II, the case studies.

Conclusions

The following conclusions have been drawn from an analysis of the findings of the study:

1. Businessmen are concerned about maintaining and improving the efficiency of their clerical work force.
2. Companies prefer to train clerical workers by using one or more on-the-job training techniques rather than by employing outside training agencies or by conducting in-company formal training programs.

3. The larger a company's clerical force the more likely the company is to provide clerical workers with (a) full or partial tuition aid for evening school or college courses, (b) in-company formal training programs, and (c) training provided by out-of-company agencies.
4. Formal training programs conducted by companies and by outside agencies generally focus upon workers' or an individual company's immediate clerical training needs rather than upon helping workers prepare for job advancement or for meeting long-range company goals.
5. Duplication exists between course offerings of educational institutions and other out-of-company training agencies and in-company formal training programs of business firms in areas of skill development and general education.
6. A gap exists between clerical training provided in schools and clerical training required for on-the-job performance.
7. The effect of technological changes upon clerical job requirements indicates a need for training in data processing and in technical secretarial skills.
8. The number of companies with substantial formal training programs for clerical workers is distinctly small.
9. In-company formal training programs often include some form of supervised on-the-job training or simulated office experience.

10. Many companies that conduct formal training programs do not utilize research methods in planning and developing their programs and do not evaluate and follow-up their training efforts in any way.
11. There is a lack of valid evidence concerning the value of training programs.

ANALYSIS OF IN-COMPANY AND OUT-OF-COMPANY EDUCATIONAL AND TRAINING PRACTICES FOR CLERICAL WORKERS OF LEADING FIRMS IN THE GREATER BOSTON AREA

By

Eleanor Hollis Tedesco

In Two Volumes
Volume II: Description of Supporting Case Studies

A THESIS

Submitted to
Michigan State University
in partial fulfillment of the requirements
for the degree of

DOCTOR OF EDUCATION

Business and Distributive Education

College of Education

1967

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ELEANOR HOLLIS TEDESCO

1967

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INTRODUCTION

This study isolated 38 companies that were conducting and/or planning to conduct formal training activities for their clerical employees and also identified 12 out-of-company agencies that were providing formal training activities for clerical employees. Each company was visited and analyzed according to common elements. The process of analysis included personal interviews with employees involved in the clerical training function, visits to training facilities, observing and/or participating as a trainee in training sessions, and using printed or office duplicated materials supplied by interviewees.

Cases are presented for study by individuals who wish details concerning the nature of training programs provided by companies in the Greater Boston area. Training directors, business teachers, professors, and others concerned with training of personnel may find the information to be of interest and value. The cases are presented in three sections: (1) companies with extensive formal training programs, (2) companies with less structured and/or less extensive training programs, and (3) out-of-company agencies offering formal training for clerical employees. An index is given to facilitate locating cases by selected characteristics.

SECTION I

CASE STUDIES OF COMPANIES

WITH EXTENSIVE FORMAL TRAINING PROGRAMS

Companies vary widely in the extensiveness of their formal in-company training programs for clerical employees and in the degree of formality introduced. Cases have been divided into two groups in an attempt to take into account these differences. Section I contains case studies of 17 companies; Section II, case studies of 21 companies.

Case studies in this section were difficult to group into categories which would take into account different types of training programs, variations in purpose, content, and implementation procedures as well as various classifications of clerical employees involved in these programs. Because of these differences, these cases are grouped according to type of training provided: (1) companies with orientation training and skill training in job duties and procedures and (2) companies with skill training in special skills and knowledges in addition to other types of training. This grouping is arbitrary and somewhat overlapping, but it helps in making a distinction between the extent of training provided by these companies.

Each case study in Section I contains an overview of the company's clerical training function and a detailed description of formal training activities being conducted or being planned. The overview includes the type of company, the number of clerical office employees, and internal and external training practices sponsored by the company for clerical employees. This information serves as a frame of reference within which formal training activities are reported in detail.

In each case, formal training activities are classified according to (1) in-company training and (2) out-of-company training. Under the heading in-company training, planned instruction conducted in a classroom or conference situation is enumerated. These activities may be highly organized, such as vestibule training, or may be less formally structured, such as certain job rotation and understudy approaches, but in other aspects involve more than supervised on-the-job training. Informal training methods, such as on-the-job training, are mentioned when they are part of formal training activities. For purposes of this study, the structure of present and future in-company training activities consists of the following elements: purpose, administration and organization, objectives, content, and implementation. These elements are discussed, depending upon their relevancy to the program and upon the complexity of the program, under the following headings: purpose, development, responsibility, trainees, schedule, physical facilities, cost, and program objectives, content, instructional

methods, instructional materials, reward, evaluation, and follow-up. Classifications as used in this study are defined below.

Purpose refers to the primary purpose(s) of a company's training activities: (1) to prepare new employees for work in the company, (2) to increase employees' skill and knowledge for better job performance, (3) to increase employees' skill and knowledge for job advancement, and/or (4) to broaden employees' general educational background.

Development describes the circumstances surrounding a company's decision to provide formal in-company clerical training and the type of training found to be needed.

Responsibility identifies by title and by department those employees concerned with developing, operating, and introducing formal activities. Job duties, education, and experience of those employees assigned to instructing classes are also described when feasible and when possible.

Trainees describes qualifications for program eligibility, basis for and/or procedures of selecting candidates, and, when possible, the approximate number of trainees selected.

Schedule specifies the amount of time allotted to each program and to the various activities included within the program.

Physical Facilities identifies physical areas and special equipment being used for the program.

Cost identifies, when possible, type of training costs, budgetary practices, and actual training expenditures.

Program Objectives refers to special goals to be accomplished by training.

Program Content refers to the type of training given: (1) orientation to company policies and procedures, (2) skill training in job duties and procedures, (3) skill training in special skills and knowledges, and (4) general education training. A description, when possible, is given of those specific knowledges, skills, and attitudes that are to be imparted in order to fulfill training objectives.

Instructional Methods refers to those methods used to implement program objectives.

Instructional Materials refers to types of materials used to implement program objectives.

Reward describes extrinsic rewards provided by the instructor or company during or upon completion of training.

Evaluation identifies subjective or objective methods used to measure each trainee's performance, success, or self-satisfaction during and/or upon completion of training and to measure the effectiveness of the program upon completion of training. Any application of information derived from these evaluation procedures is mentioned.

Follow-up identifies formal or informal checks used to determine a training program's effectiveness and a trainee's performance and occupational adjustment on the job some time after formal training has been completed. Any application of information derived from these checks is mentioned.

Future Training Plans refers to additions, deletions, and changes being considered or to be made with regard to present formal training activities.

Under the heading of out-of-company training, company tuition reimbursement plans to educational institutions and other outside agencies that are utilized by a company in training its clerical employees are described.

These cases are summarized in Appendix A. This digest is provided for convenient reference and for facilitating comparison of these cases with other statistical studies concerned with training clerical employees. The type of company, clerical employee size category, and identification of in-company and out-of-company training activities are presented along with an overview of each formal training program. In the interest of brevity, some liberty has been taken in condensing purpose, type of program, clerical classification of eligible employees, and program implementation.

I. Companies with Orientation Training and Skill Training in Job Duties and Procedures

In Cases A through G, in-company formal training programs for clerical employees generally focus upon orientation to company policies and procedures and upon skill training in job duties and procedures. The majority of these companies also include a small amount of skill training in special skills and knowledges. Training is carried out by one or a series of class sessions or by combining class instruction with supervised on-the-job training methods.

In Cases A, B, and C, formal training programs are chiefly concerned with preparing new clerical employees for work in the company. Formal training is given to new clerical employees in Cases A and C and is given to only new temporary clerical employees in Case B. Programs concerned with improving permanent clerical employees' job performance are occasionally given in Case C and will soon be given in Case A.

In Case D, only permanent clerical employees are provided with a formal training program. This program is designed to improve job performance of all female office employees.

However, in Cases E, F, and G, programs designed to prepare new clerical employees for work in the company as well as to improve job performance of permanent clerical employees are common. Case E provides programs for all secretaries; Case F, for all new clerical employees and for selected permanent clerical employees; and Case G, for all clerical employees. Cases E and G are also planning to

provide additional programs. These programs will be offered to new and to permanent secretaries.

Case A

One-Day Orientation Program for New Employees; Teller Training Program

This bank employs over 1,000 clerical employees and provides them with an orientation program, teller training, a tuition aid program, and a typewriting proficiency program conducted by International Business Machines Corporation. All other training is directed on the job by employees' supervisors. Future training plans involve improving grooming and dress of all female employees.

In-Company Training

Purpose. Formal training activities are designed to prepare new clerical employees for work in the company and to prepare permanent clerical employees for advancement to teller positions. Formal training will be offered in the near future to all female employees to increase their knowledge for better job performance.

Development. Formal training activities have been conducted since 1958 in order to implement the training policy set forth by top management. This policy advocates the utilization of organized training procedures in whatever form that seems most appropriate to each situation.

Responsibility. Two officers, the assistant treasurer and the vice president of the personnel division, are responsible for developing and administering the bank's training function. They also conduct some of the class sessions along with other bank

officials. Supervisors participate in programs by providing new tellers with on-the-job guidance.

Physical Facilities. All training is conducted on the company's premises. Two classrooms are available for classes.

Programs. The following training activities for clerical employees are described below: (1) orientation, (2) teller training, and (3) future training plans.

I. Orientation

Purpose. This program introduces new clerical employees to the company.

Trainees. All new clerical employees are required to attend.

Schedule. The orientation program is one day in length and is held the third Wednesday of every month. No large steady inflow of new employees exists to warrant presenting a weekly orientation program. During some weeks only three or four new employees join the bank; in other weeks, as many as 15. The program begins at 9:15 a.m. and ends at 2:00 p.m. with new employees returning to their respective departments.

Objectives. This program, entitled "Getting Acquainted with Bank," provides new employees with an explanation of company procedures and personnel policies.

Content and Implementation. Program content includes orientation to company policies and procedures and skill training in telephone usage. Personnel policies and procedures are explained by various bank officials followed by lunch and a guided tour. The

importance of telephone courtesy also is introduced at this time. The telephone session consists of a film, "In a Manner of Speaking," a humorous skit with dummy phones, and a flannel board presentation on telephone usage. This session is scheduled as the last item on the morning's agenda. The lightness of the subject matter makes this session particularly suitable to help counteract increasing fatigue among participants.

The program schedule given below shows the arrangement of the various sessions and provides a topical outline of the program along with an identification of instructors by title.

9:15 a.m.	Welcome by chairman of the board
9:25	Benefits and Salary Procedures by assistant vice president of personnel division
9:50	Educational Opportunities by assistant treasurer of personnel division
10:00	Coffee
10:15	Job Evaluation and Performance Rating by personnel division representative
10:35	Telephone Courtesy by assistant treasurer of personnel division
12:00 p.m.	Lunch at bank's dining room
1:00	Tour of Bank

II. Teller Training

Purpose. This program trains employees to perform the teller function.

Trainees. Trainees are men or women with a year and one-half to two years of college education, some with secretarial training. They may be employees who have just been hired by the bank or employees

who have been performing other job functions at the bank and who desire to become tellers. No more than six to eight trainees participate in each program.

Schedule. Length of program varies from three months to one year. Five or six programs are started each year. Trainees who are new employees also attend the orientation program during the first month of employment with the bank.

Objectives. The program orients trainees to bank's policies and procedures and trains them in mechanics of teller's work and in customer relations techniques.

Content and Implementation. Program content includes orientation to bank's policies and procedures, skill training in job duties and procedures, and skill training in customer relations techniques. Tellers are trained by a combination of class instruction and understudy method.

The first part of the program consists of three weeks of class instruction and cage training. This part is conducted by the two officers in charge of training. Class instruction includes lecture and discussion techniques. Cage training is conducted through role-playing methods facilitated by placing a dummy cage in the classroom. A textbook published by the American Banking Association is used. Tests to determine trainees' progress are given throughout this part of training.

In the second part of the program, trainees are placed on the job under the guidance of a supervisor and an officer. At the end of three months and every month thereafter, these superiors complete written reports assessing the job performance of each trainee.

Trainees who have not been promoted to regular teller positions within a year are assisted in re-examining their qualifications in terms of the teller occupation.

Future Changes. The officers in charge of training are developing programmed instruction materials as a possible method for training tellers. Their hesitancy about using this approach involves evaluating the effect of this method upon the trainee with regard (1) to loss of class stimulation, (2) to eliminating personal contact between instructor and trainee, (3) to making no wrong answers, (4) to not being able to ask questions, and (5) to length of time material will be retained.

III. Future Training Plans

Plans are being developed to instruct women employees on proper dress and make-up. A qualified representative from a Boston department store will be invited to conduct classes. Employees will be grouped according to age. A session geared to the needs and interests of each group will be held.

Out-of-Company Training

Full tuition aid is provided for any course satisfactorily completed at the American Institute of Banking. The same assistance is available for courses taken at other institutions if the course is connected with the employee's present or future work or would be beneficial to the bank's operations.

In addition, each year International Business Machines Corporation conducts its typewriting proficiency program on the bank's premises.

Clerical employees attend a one-hour session on a volunteer basis. Each session is limited to 15 employees. Three one-hour sessions can be conducted daily. Usually about 150 employees attend each year. Sessions are held for three days in order to accommodate this number of employees.

Case B

Orientation for Seasonal Employees

This wholesale and retail grocery firm employing about 200 permanent clerical employees has found it expedient to provide its seasonal clerical workers with a planned training program. All other incoming clerical employees are trained on the job by supervisors and department managers with the employment manager and personnel director functioning as staff advisors. These employees may increase their job proficiency through out-of-company activities.

In-Company Training

Purpose. Formal training activities are designed to prepare new temporary employees for work in the company.

Development. From early in November to December 24, this company experiences such an increase in business activity that it temporarily must add over 200 part-time clerical employees to its labor force. The majority of these employees work from 5:30 p.m. to 9:00 or 10:00 p.m., five evenings a week, until December 24.

Until 1962, supervisors of the various units within a department were being interrupted constantly during this period to train an incoming flow of office employees. Supervisors were faced with the problem of determining to what degree training should be neglected in favor of other duties. Study of the interrelationship of the various job functions indicated that much of this training activity could be eliminated through group training.

In 1962, the employment manager established a plan to relieve supervisors of as much orientation training as possible and to schedule more efficiently their remaining training activities. A short orientation and job training program followed by supervised on-the-job training was instituted to prepare temporary employees for their various job assignments. The program proved successful in training employees satisfactorily and in relieving supervisors of a great deal of their training responsibility. Class instruction in the 1963 program was made more effective with the addition of an overhead projector and with minor changes in the length and content of some classes.

Responsibility. Development and administration of the training program is the responsibility of the employment manager in the personnel department with approval from the personnel director. Program revisions are based primarily on reports from supervisors and department managers. These reports specify changes in job procedures and areas in which temporary employees show weaknesses. Classes are conducted by the employment manager; on-the-job training, by supervisors and sometimes by department managers.

The major job function of the employment manager is responsibility for nonsupervisory office employment activities; minor job functions are training temporary workers and serving as a staff advisor to department managers in the area of job training. Educational background includes two years of post high school education at a retailing school. Experience includes two years in merchandising, one year as a licensed insurance agent, and five years as a personnel assistant

in a small company prior to joining the company four years ago as employment manager.

Trainees. Trainees are temporary clerical employees classified according to one of seven job assignments: credit clerk, card writer, denominator (keeps a running inventory of stock on hand), editor, sorter, verifier, and acknowledgment typist. Requirements for these assignments vary to some extent. Trainees classified as acknowledgment typists are required to pass a five-minute typewriting test with a minimum speed of 45 net words per minute with no more than three or four errors. Editors must have had previous experience in handling detailed clerical work or possess some college education which would indicate their ability to learn this type of work quickly. The other job classifications usually can be handled by anyone with some clerical background.

Trainees are usually housewives, students, or employees from other companies who would like day or evening temporary work. The employment manager uses the interview technique in selecting these employees plus the results of a typewriting test for acknowledgment typists.

Over 200 part-time clerical employees join the office force during this period. They are trained in groups that range in size from 15 to 30 trainees apiece. Included in these groups are employees joining the company for the first time as well as those returning from previous years. Participation provides the latter group with refresher training and with notification of changes and/or

additions in procedures. Trainees classified as editors are given additional training. These groups average about five trainees each.

Schedule. The training program is given twice a week beginning the first week in November and ending the second week in December. Training continued after that date cannot be justified in terms of number of days remaining for employment.

Every Monday and Wednesday an orientation class of one and a half hours is held from 6:00 to 7:30 p.m. Occasionally an employee assigned to work day hours cannot attend the evening training session. This employee then is trained during the day by a supervisor.

After orientation class, all trainees except those preparing to be editors are shown to their assigned work areas. Their respective supervisors and sometimes their department managers provide them with whatever on-the-job training may be needed to perform their duties.

Editor trainees are given an additional six and a half hours of classroom instruction. The first two and a half hours are scheduled the same evening as their orientation training. The next evening editors complete class instruction and begin their job assignments. From this point on supervisors provide any needed instruction through on-the-job training.

In the 1962 program, editors were given four evenings of class training. Supervisors reported that temporary editors frequently did not use certain parts of this training; and, if such training were to be needed, on-the-job supervision would suffice. These recommendations resulted in condensing class training for editors into a two-day period.

Physical Facilities. A large foyer in the personnel section is converted into a classroom for the duration of the training program.

Cost. Training costs are charged to the budget of the personnel department. The cost of the 1963 program was $3,000. Major expenses were cost of projector equipment and transparencies plus trainees' salaries of $1,500. The only major expense of the 1964 program will be trainees' salaries.

Objectives. Class instruction and supervised on-the-job training are designed:

1. To provide general knowledge about the company.
2. To provide general understanding about processing an order.
3. To train in the functions of one of seven jobs concerned with processing orders.

Content. Program content is concerned with orientation to company policies and procedures and with skill training in job duties and procedures. All temporary employees are given information about the company, flow of orders, and reasons behind the various procedures. After orientation class, all employees other than editors learn their specific job duties through supervised on-the-job training.

Editors are given classroom instruction covering basic operations of their jobs. They are taught how to process different kinds of orders and customers' correspondence. They learn how to use the company's comprehensive reference manual in determining merchandise prices and in figuring shipping, packing, and other special charges. Further instruction is given on the job when needed.

Instructional Methods. Class instructional methods include lecture and demonstration combined with supervised practice. Trainees, especially editors, practice completing and interpreting orders at their desks. At the same time, the employment manager explains the correct procedures with the aid of a projector. No outside assignments are given. Trainees complete practice assignments in class.

Instructional Materials. Trainees are provided with samples of various order forms to analyze and to use in practice assignments. Each editor trainee receives a company reference manual. The manual, prepared by company officials, includes all technical information necessary for handling the company's clerical activities.

An overhead projector is used to increase the effectiveness of classroom instruction. Transparencies have been made of various order form blanks for projector use. The manager uses an erasable grease pencil to fill in transparency forms with whatever information is pertinent to class instruction.

Evaluation. No written tests are given during training. Verbal flashing is used. Department managers and supervisors evaluate employees when the latter terminate employment. They send a written evaluation of each employee's job performance and desirability for re-employment to the employment manager.

Out-of-Company Training

Full-time permanent employees are offered tuition assistance for completing courses directly related to their present work. Full

tuition is paid for courses completed with at least a B- grade; 50 per cent tuition, for courses completed with any passing grade below this level.

Case C

Orientation Integrating On-the-Job Training with Formalized Instruction

This regional office of a nationwide insurance firm trains its 150 clerical employees by integrating on-the-job training with formalized instruction. All training plans, programs, and procedures are established by its home office.

Formal training activities concentrate primarily on helping new clerical employees attain minimum acceptable performance standards as soon as possible. New employees are provided with a clerical induction program immediately after employment and with a clerical orientation program three months later. Other formal activities for clerical employees include an occasional operative skills course and a supervisory course in teaching skills.

All other training for these employees is handled on the job. Each supervisor develops on-the-job training situations that seem to be implied from problems that arise or from errors that occur. A tuition aid plan for out-of-company activities is in a developmental stage.

In-Company Training

Purpose. Formal training in this company is designed primarily to prepare new clerical employees for work in the company. Occasionally formal training is conducted to increase permanent clerical employees' knowledge and skill for better job performance.

Formal training activities are described below: (1) clerical induction training program, (2) clerical orientation, and (3) operative skills course.

I. Clerical Induction Training Program

Development. Top management's attitude toward training, which has been set forth in its company's policies, involves providing systematic and comprehensive training for all positions and encouraging individual development. These policies embody management's thinking that training is the best way to improve employee efficiency and to increase ability for performing job responsibilities. Training beyond specific job requirements contributes to the continuing development of employees as individuals. Such training is beneficial both to the company and to the individual.

Management implements these policies by providing comprehensive training activities directed toward employees' present and/or future assignments. Formal programs have been integrated with organized on-the-job training methods. These activities are designed to shorten the time necessary to attain satisfactory job performance and to minimize errors while learning.

Management has set up the following standards for all training activities:

1. Specific training objectives that consider the level of desired job performance during the program and upon its completion.

2. Realistic appraisal of the training situation with regard to trainees' background and ability and to time required vs. time available.

3. Adequate content to meet objectives.

4. Qualified trainers in knowledge of subject matter, in selecting teaching techniques, and in being prepared to teach.

5. Written, detailed plans for conducting training.

6. Training methods and aids suited to the subject matter, the learning situation, and the trainee.

7. Adequate opportunity for the trainee to learn by doing.

8. Provision for evaluating training.

9. Follow-up training to remedy any deficiencies.

In 1957, this philosophy was incorporated into a four-day program designed to introduce the clerical employee to her job, her fellow employees, and the company. The program combines on-the-job training with class instruction.

Responsibility. The program is administered by the training manager in the personnel department. Class sessions are conducted by members of the personnel department and by each trainee's supervisor. The supervisor is also in charge of providing the trainee with on-the-job training. Nonsupervisory clerical personnel assist supervisors with job training by teaching various job procedures.

Members of the personnel department and the trainees' supervisors are well qualified in their subject area and have completed company courses in teaching skills. These instructors are also trained by the training manager. The training manager prepares them to teach sessions by:

1. Discussing the purpose and objectives of the program with them.

2. Reviewing in detail the content and sequence of the entire program.

3. Demonstrating how the session should be handled by the assigned instructor.

4. Acting as a trainee to give the instructor practice in going through the entire session.

5. Checking regularly on the instructor's ability to handle the session through discussions with trainees, supervisors of new employees, and the instructor, and from information provided by training reports.

Nonsupervisory employees who teach operative skills attend a job instruction training course designed to equip them with effective training methods. This course is an adaptation of the job instruction part of the Training Within Industry program that was developed during World War II. The training manager conducts the course in four or five two-hour sessions in one of the interviewing rooms. Four to eight employees attend at one time. Topics covered are principles of learning, 4-step training method,[1] job breakdown, training records, and training reports.

Trainees. Trainees are new clerical nonsupervisory employees. They usually have just graduated from high school with varying amounts of secretarial training and with little or no previous working experience. They are classified as secretaries, typists, steno clerks, transcription typists, copy typists, duplicating machine operators, and file clerks.

The program is designed to be given to one or as many as four clerical trainees at one time. Each trainee's immediate supervisor

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[1]The 4-step training method consists of the following steps: (1) prepare the trainee, (2) present the operation, (3) apply the training, and (4) follow-up.

conducts summary sessions and job training activities on an individual basis. This arrangement helps to build rapport between supervisor and subordinate.

Schedule. The four-day program is completed within the trainee's first five days on the job. It contains 14 class sessions varying from 15 minutes to 90 minutes in length and requiring a total of 11 1/2 hours. The remaining time is devoted to job training.

Training activities are scheduled as follows:

Time	Subject	Instructor
Day I		
8:00 - 8:05 a.m.	Welcome to Company	Receptionist
8:05 - 8:30	Introduction to Induction Training Program	Supervisor or Pers Mgr or Tng Mgr
8:30 - 9:30	Personnel Registration	Personnel Clerk
9:30 - 9:45	Rest Period	
9:45 - 10:45	Introduction to Company	Pers Clerk or Tng Mgr
10:45 - 11:00	Tour of Office and Facilities	Supervisor
11:00 - 12:00	Introduction to Unit and Its Place in the Office	Supervisor
12:00 - 1:00 p.m.	Lunch	
1:00 - 2:30	Office Practices	Pers Clerk or Pers Mgr or Tng Mgr
2:30 - 4:30	Job Training	Supervisor
4:30 - 5:00	Summary of Day I	Supervisor

Time	Subject	Instructor
Day II		
8:00 - 9:00 a.m.	Employee Benefits and Services	Personnel Mgr
9:00 - 12:00	Job Training	Supervisor
1:00 - 2:00 p.m.	Our Product	Sales Correspondent or Tng Mgr
2:00 - 4:45	Job Training	Supervisor
4:45 - 5:00	Summary of Day II	Supervisor
Day III		
8:00 - 9:30 a.m.	Company's Personnel Practices	Supervisor or Pers Mgr or Tng Mgr
9:30 - 9:45	Rest Period	
9:45 - 12:00	Job Training	Supervisor
1:00 - 4:30 p.m.	Job Training	Supervisor
4:30 - 5:00	Summary of Day III	Supervisor
Day IV		
8:00 - 8:30 a.m.	Review of Program	Training Mgr
8:30 - 12:00	Job Training	Supervisor
1:00 - 4:30 p.m.	Job Training	Supervisor
4:30 - 5:00	Summary Discussion of Program	Supervisor

Sessions are scheduled in this sequence and at the particular time of day for definite reasons. Some of these reasons are:

1. The trainee is scheduled to work with the training manager at those times her supervisor is busy with duties which would make it difficult to devote time to induction training activities.

2. The record phase of the personnel registration is separated from the session on benefits and services to minimize confusion and any chance of the trainee feeling that she has signed her life away after filling out personnel forms.

3. Benefits and services are discussed on the second day in order to preview the subject on the first day. This arrangement gives an opportunity for some advance thinking on benefits prior to their being explained fully.

4. Time is set aside the first morning for introducing the trainee to her work station, fellow employees, unit's work, and its part in the company's operations. This arrangement helps to integrate induction sessions with on-the-job training.

5. The session dealing with office practices is presented before the trainee makes mistakes or forms bad habits.

6. The supervisor checks with the trainee at the end of each day to reassure her. This arrangement gives the supervisor an opportunity to review what has been presented and to preview the next day's schedule.

7. The review section is scheduled at the end of the program to give the training manager an opportunity to check subjects covered in sessions and progress with job training.

Trainees usually start work on a Monday morning. This practice avoids the necessity of conducting the same sessions more than once each week. If any trainee should begin training on a day other than Monday, sessions are rescheduled to prevent unnecessary duplication of training efforts. An example of a plan is outlined below.

	Employee A (Started Monday)	Employee B (Started Tuesday)
Monday	Day I of Formal Training	Day I of Formal Training
Tuesday	On-the-Job Training	Day II of Formal Training
Wednesday	Day II of Formal Training	Day II of Formal Training
Thursday	Day III of Formal Training	Day III of Formal Training
Friday	Day IV of Formal Training	Day IV of Formal Training

Thursday and Friday are not selected as days for beginning new employee training. Experience has shown that the weekend tends to interfere with employees' ability to remember what was just learned.

Physical Facilities. Sessions are built around a standard sized notebook containing flip sheets. This makes it possible to conduct training at a desk in an open work area or, when possible, in one of the interviewing rooms. Job training is conducted in the trainee's work unit.

Cost. Clerical training costs have not been separated from those of other company training activities.

Objectives. Objectives of the program are:

1. To create a friendly atmosphere that makes the trainee feel at home.

2. To review advantages of employment with the company.

3. To explain the employee benefit program and to make certain that the trainee has sufficient information for selecting and using these benefits.

4. To provide the trainee with information to explain to his family and his friends concerning his job, its relation to other company operations, company's product, company's service to the public, and company's functions in the business world.

5. To lay the groundwork for good communication by giving the trainee an opportunity to ask questions.

6. To develop an understanding of office practices, health, and safety.

Content. Program content is concerned with introduction to company policies and procedures, with skill training in job duties and procedures, and with skill training in certain office skills. Of 15 class sessions, ten are devoted to presenting a specific topic; and five, to reviewing them. Session topics are:

1. Welcome to the Company
2. Introduction to the Induction Training Program
3. Personnel Registration
4. Introduction to the Company
5. Tour of Office and Facilities
6. Introduction to Each Trainee's Work Unit and Its Place in the Office
7. Office Practices
8. Employee Benefits and Services
9. Company's Product
10. Company's Personnel Practices

On-the-job training is planned in detail by each trainee's supervisor. This training is designed to help the trainee acquire necessary job knowledge and skill in the actual environment of her permanent work assignment. The trainee "learns by doing" under guidance.

Instructional Methods. A combination of conference, lecture, and demonstration methods is used. Most of the sessions are built around a series of flip sheets to give direction to discussion.

Instructional Materials. Management at the home office has developed an instructor's guide. This manual contains suggestions for organizing the program and lesson plans for every session of the program. The regional office makes local adaptations to the standard program.

A training aids book provides flip sheets. This aid is keyed to the instructor's guide.

Evaluation. At the end of each session, the instructor sends a training report to each trainee's supervisor. Upon completion of the program, these reports are sent to the training manager and are placed in the trainee's permanent file.

Training reports are completed to assess each trainee's performance and to provide for follow-up training. In each report the instructor comments on the trainee's grasp of training and on her attitude and reactions to the training session. Any main points not discussed or fully understood during the session are noted. Topics which need to be followed up by the trainee's supervisor are listed with a suggested time schedule for doing this checking. This practice makes follow-up easier, more effective, and more consistent.

Supervisors use these reports in summary sessions as a review guide and as a basis for building follow-up training. These reports also help the training manager improve future programs. They provide a basis for determining program deletions, additions, or changes.

The trainees' reactions to the program and ideas for improving the program are sought by the training manager during the program

review session. The supervisor seeks similar information during summary sessions.

The success of training is measured by tangible results detected through reduction in turnover rate and improved job performance. Intangible results are reflected in greater company loyalty and higher employee morale. These results can be observed by new employees' comprehension of job training, use of facilities, and understanding of personnel. Comments made in appraisals, exit interviews, and day-to-day counseling provide further evidence.

Office Practice Session. This session is described because its contents deal with clerical procedural training and its format indicates how formal training provides a framework for on-the-job training activities. Office practices taught in school are reviewed, and company practices are explained.

Responsibility. The session is conducted by a member of the personnel department. An instructor from this department is preferred because of the general nature of the topic and the importance of everyone obtaining a uniform introduction to the subject.

Objectives. Objectives of the session are:

1. To explain office practices that the trainee is expected to follow.
2. To describe how the observance of these office practices will make the trainee's work more pleasant, the company's operations more effective, and the service to customers better.
3. To help the trainee appreciate the need for being safety conscious in the office.
4. To help the trainee realize that the company is interested in her health.

Content and Time Schedule. Subject matter is presented in a 90-minute session on the first day of training. The main points covered and the number of minutes allotted to each part are outlined below.

Subject	Approximate Time
Introduction to Office Practices	10 minutes
Topic, purpose, and objectives of session	
Company's Office Practices	
Ten-steps to job success	10 minutes
Review	5 minutes
Specific office practices	10 minutes
Proper Telephone Techniques	
Mechanics of telephone operation	5 minutes
Answering calls	5 minutes
Placing calls	5 minutes
Using the telephone efficiently	5 minutes
Break	5 minutes
Safety in the Office	10 minutes
Importance of practicing safety	
Common hazards in the office: files, floors, tripping, fires	
Instructions for handling an accident	
Healthful Living	5 minutes
Importance	
Good health practices for self and others	
Review of Session	10 minutes
Review main points	
Make assignment	
Explain next phase of program	

Instructional Methods and Materials. This session combines lecture and discussion methods. Flip sheets also are used. A booklet reviewing office practices is assigned for reading.

Step-by-step instruction plans are provided for each session. The "Steps of Presentation" column tells the instructor what to do, and the "Materials and Methods" column tells what is to be taught and suggests how to teach it. Below is an excerpt from these plans.

Steps of Presentation	Materials and Methods
Discuss these specific office practices or regulations.	Turn to page XX of the Training Aids Book. Note: On this page should be listed the specific topics on which we have established office practices, standards or advice. Here are the topics which seem to have general application. Add to this list any topics you feel require special discussion. Page XX: absences, gossip, housekeeping in the office, office visitors, personal appearance, personal telephone calls, punctuality, smoking, and complaints--questions. Discuss each of these office practices or regulations in this way. Have the trainee tell you what standards she would set for that practice if she was a supervisor counseling a new employee. Clinch this discussion of the need for observing these practices. Explain our standards for this office practice. Here are the standard points to bring out. You will want to adapt them to your office.

Steps of Presentation	Materials and Methods
a. Absences	a. Importance of having a good attendance record. If you can't be present--let your supervisor know immediately or ahead of time.
b. Gossip	b. Remind the trainee of the importance of keeping information confidential"--e.g. payroll, credit reports, claim reserves, etc. Get the trainee to recognize how gossip can injure others. Suggest that the employee should refrain from passing on rumors--that they should "spike" these and discourage such talk.

Trainee Assignment. A booklet reviewing office practices is assigned for reading.

Evaluation and Follow-up. Upon completion of the session, the instructor fills out a training report for each trainee and gives the report to the trainee's immediate supervisor. The suggested time for follow-up of training is specified on the report. The supervisor adds these follow-up dates to her calendar pad. The report is set up as follows:

Subject	Suggested Time for Follow-up	Date of Follow-up by Supervisor
	All of these topics are checked in supervisor's summary sessions on the program's first and last day and according to the schedule below:	
Absences	First appraisal--60 days	
Gossip	" "	
Housekeeping in the Office	" "	
Office Visitors	" "	
Personal Appearance	" "	
Personal Hygiene	" "	
Punctuality	" "	
Smoking	" "	
Complaints--Questions	" "	
Telephone Techniques	When assigned telephone handling responsibility	
Office Safety	" "	
Healthful Living	Lunch periods	

On the fourth day of the program, the training manager reviews the material covered in this session. Trainees are asked to comment and give their reactions to the session.

During the program, the supervisor also reviews the topic with her trainee. After the trainee has been on the job a few days, the supervisor observes (1) how the trainee

follows office practices, (2) her telephone techniques, and (3) her understanding of office practices, safety precautions, and requirements for success.

II. Clerical Orientation

Purpose. This program is designed to build knowledge and understanding about the company's product and the functions of each department. It elaborates on topics discussed in induction training and answers questions that the trainee's work experience has raised.

Responsibility. The training manager administers the program. Sessions are conducted by the training manager and other management personnel who have firsthand knowledge of topics included in the program.

Trainees and Schedule. Small groups of clerical employees attend an orientation program three months after employment. By that time employees are thought to be more established in their jobs and better prepared for orientation than would be possible if they participated in such a program shortly after employment. The program consists of an hour session conducted weekly for seven weeks.

Physical Facilities. Sessions are conducted in one of the interviewing rooms of the personnel department.

Objectives. The program is designed to provide each trainee with:

1. Knowledge of the development of the insurance industry and the history of the company.
2. Elementary knowledge of the basic principles of insurance and its functions in the economy.
3. Knowledge of the types of company insurance provided by the company.

4. Knowledge of the company's objectives and particularly those that apply to her position.

5. Acquaintance of the functions of various departments, how they are integrated, and how they help achieve company objectives.

6. Appreciation of the company's organizational relationships.

7. Familiarization of how work flows through the office.

8. Additional knowledge and appreciation of health and safety principles.

9. Awareness of her responsibility for the company's successful operation.

Content. Program content is concerned with orientation to company policies and procedures. A session is allotted to each of the following topics:

1. History of Insurance and History of Company

2. Company's Product

3. Company's Philosophy of Operation

4. Company's Organization

5. Work Flow and Operation of a Regional Branch Office

6. Health and Safety

7. Employee Benefits and Services

Instructional Methods and Materials. The same methods as those described for clerical induction training are used. An instructor's guide outlines the program. A detailed lesson plan is provided for the first session.

Evaluation. The training manager sends a performance report to each trainee's supervisor.

III. Operative Skills Course

Formal training in office operations occasionally is offered for various classifications of permanent clerical employees. The purpose of this training is to improve job performance by providing skill training in new or current job procedures and office skills.

An example of an operative skills course is instruction on the electric typewriter. This course is designed to train typists to operate machines efficiently. It consists of three one-hour sessions conducted by a supervisor or a qualified nonsupervisory clerical employee. Usually from 8 to 12 typists attend at one time. Upon completion of the course, the person conducting the course sends a written report describing course performance to each trainee's supervisor.

Case D

One-Day Training Institute for Permanent Employees

This the central office of a Massachusetts service organization with national affiliation. The administrative assistant in this office coordinates clerical training activities of all offices in the state. On-the-job training activities conducted for clerical personnel are supplemented by an annual one-day training institute. Tuition aid is occasionally given for out-of-company training.

In-Company Training

Purpose. Supervised on-the-job training is given to prepare new clerical employees for work in the company. Formal training is designed to increase permanent clerical employees' knowledge and skill for better job performance. Formal training activities described below include: (1) on-the-job training and (2) one-day training institute.

I. On-the-Job Training

This type of training is described here in order to report all organized training activity carried on by the company and to indicate how this training is supplemented by a one-day institute. Clerical office personnel in central and local offices are trained by a combination on-the-job training by predecessor, fellow employee, and supervisor. An office manual is used as a basis for some job instruction. Upon request, the administrative assistant from the central office will spend a day in any local office to help train a new secretary. In the central office the administrative assistant

supervises clerical training and is assisted by management personnel. The latter group trains clerical assignees in job technicalities familiar only to them.

II. One-Day Training Institute

Development. The administrative assistant as well as executives in central and local offices thought that a one-day conference would be beneficial to clerical employees with some longevity. These employees would be given an opportunity to improve their job performance by learning and relearning special skills and knowledges that contribute to performing job duties satisfactorily and by becoming cognizant of office procedural changes concerned directly or indirectly with executing job duties.

The administrative assistant then consulted with a secretarial instructor from a local college in developing a program for these employees. The first one-day institute was offered in 1961. No institute was held in 1962 because of staff shortages. At the request of executives, the institute was repeated in 1963. The continued need for the institute has resulted in plans being made to conduct this activity on an annual basis.

Responsibility. The administrative assistant of the central office is in charge of developing and organizing the program. Ideas for subjects are sought from both supervisory and nonsupervisory employees. Sessions are conducted by the administrative assistant and representatives from other organizations.

The administrative assistant functions as the general office manager of the organization, assists the director, and supervises

financial activities and formal and on-the-job training activities. Of the time allotted to these activities, about 25 per cent is devoted to training. Educational background includes two years of college with a major in secretarial studies. Business experience includes a total of 20 years of secretarial and office management experience in this firm.

Trainees. Nonsupervisory office personnel from all offices throughout the state are invited to attend the institute. These employees usually have some company longevity. The central office employs five nonsupervisory office personnel; local offices employ from one to five such employees. All employees perform similar job activities and are classified as typists or secretaries.

Employees register by mail for the institute. Of 45 possible registrants, 40 attended the second annual institute.

Physical Facilities. The 1963 institute was held in one of the conference rooms of a nearby restaurant in Boston. This meeting place was located within walking distance of the central office which made it possible to schedule an office tour.

Schedule. The 1963 institute was held on a weekday in September. This date was selected from solicited suggestions received from non-supervisory employees. This method of selecting a date is necessary in order to schedule the institute at a time that would not conflict with job responsibilities. During certain times of the year heavy office work loads could prevent these employees from attending any outside activity.

Sessions were scheduled as follows:

10:00 - 10:20 a.m.	Registration and Coffee
10:20 - 10:30	Introduction to the Institute
10:30 - 11:30	Telephone Courtesy
11:30 - 11:50	Bookkeeping and Filing
11:50 - 12:15 p.m.	Tour of Office
12:15 - 1:15	Lunch
1:15 - 2:00	Women in Business
2:00 - 2:45	Idea Exchange
2:25 - 3:30	General Discussion

Cost. The nonprofit purpose of the organization limits funds available for training. Operational costs of the program are kept at a minimum. No funds are available for paying fees to outside speakers. Travel expenses are reimbursed when necessary. The morning coffee and lunch expense totals $3 for each participant. This cost is paid by each participant's office.

Objectives. The program is designed:

1. To help participants solve any problems that they may be encountering in performing their job duties.
2. To train and retrain them in those special skills and knowledges that contribute to satisfactory job performance.
3. To inform them about new office procedures that directly or indirectly concern their job duties.

Content. Program content is concerned with skill training in job duties and procedures and with skill training in special skills and knowledges. It deals mainly with public relations practices and office procedures. The 1963 institute included a tour of the central

office and a group of five sessions: (A) telephone courtesy, (B) bookkeeping and filing, (C) women in business, (D) idea exchange, and (E) general discussion of day's activities. A short description of each session is given below.

A. Telephone Courtesy

A representative from the telephone company presented the film, "Telephone Courtesy," and then conducted a discussion on telephone usage.

B. Bookkeeping and Filing

The administrative assistant described new bookkeeping and filing methods that the organization was adopting. These methods have been designed to make reporting procedures uniform within the organization and among similar types of organizations.

C. Women in Business

The personnel manager of an insurance firm described women in business, their weaknesses and strong points, and what their bosses like and dislike in these women.

D. Idea Exchange

Participants shared office practices and procedures that they had devised to save time and money. Participants usually tend to be shy about presenting their innovations and cannot always think spontaneously of those they have adopted or devised. As a result,

participants were notified before the institute was to take place to prepare a presentation and to bring sample materials if possible. One participant distributed mimeographed instructions which described how to build a collating rack.

E. General Discussion of Day's Activities

This session concluded the day's activities. It was held to gain audience participation and to provide participants with an opportunity to discuss previous sessions. In addition, if the preceding sessions extended beyond their assigned time, this session could be easily shortened.

Reward. A few local merchants donated door prizes. Typewriting and other office equipment manufacturers supplied brochures for participants.

Evaluation. At the close of the program, participants were asked to complete a questionnaire evaluating the institute. The following questions were asked:

1. Did you feel this meeting was worthwhile?
2. What part(s) of the meeting was most useful to you?
3. What part(s) of the meeting did you find least valuable?
4. What other topics would you have discussed or presented?
5. What is the best time of year for you (from work load standpoint) to hold a future meeting (other than July or August)?
6. General comments or suggestions.

Tabulation of questionnaire answers showed that participants unanimously agreed that the institute was worthwhile. Some participants commented that meetings were lengthy. Others mentioned that they would have preferred viewing a telephone film not previously seen. However, they did recommend that this film be shown to their bosses. Requests were received for future sessions dealing with bookkeeping, campaign selling, good grooming, and fashion.

Future Institutes. The next annual institute will be held outside the city of Boston. This location will be more centrally located for all participants throughout the state and will be more accessible by its proximity to highways and by its lack of heavy city traffic conditions.

Ideas that are being considered for the general format of the next institute include keying part or all of the program to one subject or scheduling three or four round table discussions on various subjects. Study groups also may be included to provide for varying needs of those attending. Participants would be able to select either a study group offering general information or another providing detailed instruction.

Out-of-Company Training

No tuition aid policy has been established. The central office occasionally provides assistance on an individual basis. In such instances, aid is granted for courses related in some way to an employee's present or future work in the organization. Fifty per cent of tuition costs are reimbursed upon satisfactory course completion.

Provision for a tuition aid program for all office employees throughout the state has been suggested to the organization's policy makers.

Case E

Orientation, Workshops, Lectures for Secretaries

This industrial research organization with 350 clerical employees conducts formal training activities for its 200 secretaries. These activities include orientation for incoming secretaries, workshops for all secretaries, and special lectures for long-term secretaries. Future plans include the addition of conferences for permanent secretaries and a secretarial program for high school seniors. Other clerical employees such as mail clerks and telephone operators receive only on-the-job training conducted by predecessors or fellow employees. Occasionally the latter group receives switchboard training from a visiting instructor from the New England Telephone and Telegraph Company. No tuition aid is given for out-of-company training.

In-Company Training

Purpose. Formal training is designed to prepare new secretaries for work in the company and to increase present secretaries' knowledge and skill for better job performance.

Development. Management's concept of the secretarial function has hampered the development of secretarial training activities. Management is composed of professionally trained research and development personnel who are not fully aware of the secretary's importance, functions, and training needs. They tend to classify a secretary as anyone who can take shorthand at 80 words per minute.

The assistant to the office manager who supervises the company's clerical activities finds an increasing need for secretarial training. New secretaries need indoctrination; other secretaries need periodic training to improve and maintain satisfactory production rates and work habits.

Since 1961, the assistant to the office manager has been providing a limited amount of secretarial training without complete support from management. Such an undertaking has been possible because the assistant to the office manager is responsible for the over-all operation of clerical activities and approaches training as an educational tool, not a remedial one. Management's support of clerical training activities is expected to occur only in conjunction with major procedural changes that may take place in the office. An example of a major change would be the introduction of electronic data processing activities.

Responsibility. Training activities for new and permanent secretaries are being developed and administered by the assistant to the office manager. Orientation training for new secretaries is also administered by their assigned executives. Class instruction is conducted by the assistant to the office manager, representatives from the personnel department, and/or outside speakers; on-the-job training for new secretaries is supervised by lead secretaries.

The main function of the assistant to the office manager is supervising the execution of the company's clerical function. Minor duties include administering, organizing, and instructing clerical training activities. Her background includes four years of college

with a major in chemistry, business school training, and over 20 years of secretarial and office management experience.

Programs. The company's training activities for new and permanent secretaries are described below: (1) orientation, (2) workshops, (3) lectures, and (4) future training plans.

I. Orientation

Purpose. This program is designed to prepare new secretaries for work in the company.

Responsibility. The administration and organization of the program are shared by the assistant to the office manager and by each new secretary's boss. The session concerning orientation to company policies and procedures is conducted by a representative from the personnel department. Individual conferences are conducted by the assistant to the office manager. On-the-job training activities are supervised by lead secretaries.

Trainees. All incoming secretaries participate in this program. These secretaries have had at least one or two years and in most cases four years of college education. Those with liberal arts majors in college usually obtain the necessary secretarial skill training by attending one of the local business schools and completing an intensive secretarial skill training program.

Physical Facilities. An office in the personnel department is used for the first session concerning company policies and procedures. The assistant to the office manager's office is used for individual meetings. The work area is used for supervised on-the-job training activities.

Objectives. This program is designed to inform new secretaries about company policies and procedures and about job duties and procedures.

Schedule, Content, and Implementation. Program content is concerned with orientation to company policies and procedures and with skill training in job duties and procedures. Each incoming secretary first reports to the personnel department. A representative of this department spends a half day explaining company rules and policies. Next the secretary is placed in her permanent position and is assigned to a lead secretary for job instructions.

The lead secretary is asked to spend a half day providing the new secretary with on-the-job training and to continue assisting her whenever requested. A company manual describing all phases of office work is given to each new secretary. This manual serves as a training device as well as a handy secretarial reference. Within two to four weeks after employment, the new secretary meets with the assistant to the office manager for an hour conference. Topics discussed at this time include company history, secretarial policies, and any problems the secretary may have encountered on the job.

Criteria for selecting and duties of lead secretaries have not been defined specifically. The assistant to the office manager pointed out that criteria involving maturity, personality, job performance, and company seniority need to be stated in detail in order to increase the likelihood of selecting a lead secretary that is a natural leader and a model secretary. No check is made to determine when or if the lead secretary has helped the new secretary

learn her job duties. The following situations have developed as a consequence of establishing no firm policy:

1. Selection of lead secretaries is often used as a prestige tool by management. Failure to follow even general criteria that has been set up for selection results in the training method becoming less effective.

2. A lead secretary is often assigned as many as seven or eight new secretaries depending on her office location, division of work, or leadership qualities. Too many assignees can interfere with the lead secretary's own work and can prevent her from spending the necessary amount of time with each new secretary.

3. Lead secretaries do not always help new secretaries as soon as they are placed on the job, and some spend little or no time with them. As a result, supervised on-the-job training turns into haphazard trial-by-error learning for the new secretary.

II. Workshops

Purpose. This program is given to increase secretaries' skill and knowledge for better job performance.

Responsibility. This program is conducted by the assistant to the office manager.

Trainees. All secretaries, both new and permanent ones, are required to attend each workshop. Secretaries attend a workshop in groups of 10 to 12.

Schedule. A typical workshop consists of one session, repeated as often as necessary in order to permit all secretaries to attend. The length of each session varies directly with the complexity of the procedures to be learned. A typical schedule allows an hour for each group of 10 to 12 secretaries. Forty minutes of this time is allotted for class instruction; and 20 minutes, for any participant

who needs additional practice or who may be hesitant about asking questions in front of a group. If this schedule is followed, a new group can report each hour. The company's entire secretarial force of 200 can be instructed within two to two and a half days.

Physical Facilities. Workshop sessions are held in one of the company's conference rooms. Typewriters are borrowed from various offices when needed for demonstration by the assistant to the office manager and for practice by trainees.

Objectives. This activity is designed to review current office procedures and/or to inform about changes or additions in office procedures and to provide experience in performing them.

Content and Implementation. Workshops are concerned with skill training in job duties and procedures and with skill training in special skills and knowledges. Each workshop concentrates upon present procedures as well as upon procedural changes and/or additions that are or will be taking place in the office and that concern the secretary's work. Each session includes lecture, demonstration, and supervised practice.

III. Lectures

Purpose. The successful outcome of a special lecture conducted for interested secretaries with two or more years company longevity has resulted in plans to provide subsequent lectures. This activity is designed to increase secretaries' skill and knowledge for better job performance.

Responsibility. An outside speaker is invited to conduct each lecture.

Trainees. Eligible participants are secretaries with two or more years of company longevity. Attendance is voluntary.

Schedule. Each lecture is one or two hours in length and is conducted periodically during regular working hours.

Physical Facilities. One of the company's conference rooms is used.

Objectives. The program is designed to maintain and to improve secretarial efficiency and morale.

Content. The program includes skill training in secretarial job duties and procedures and skill training in special skills and knowledges. Topics that relate to the secretarial function and that are of especial interest to participants are included.

At the first lecture, a nationally known professor of office management from an out-of-state university was invited to speak to the secretaries during working hours. The professor emphasized the importance of the secretarial position and described secretaries as "little managers" to their bosses.

IV. Future Plans

The assistant to the office manager is planning to expand secretarial training activities to include (A) conferences for company secretaries and (B) a secretarial training program for high school graduates.

A. Secretarial Conferences

The assistant to the office manager is planning to provide those secretaries with some company longevity

with an opportunity to improve their job performance. The program will be designed to increase their knowledge of the company and its activities and to provide them with an understanding of different secretarial functions and problems.

Program content will be concerned with orientation to company policies and procedures and with skill training in job duties and procedures. A meeting will be held for each group of six secretaries. At these meetings, secretaries will discuss their office problems and the importance of their work assignments. Each secretary within a group will represent a different company division. A group composed of a cross section of the company's secretarial force should help to give participants an overview of operations and to increase their interchange of information and problems.

B. Secretarial Training for High School Graduates

Secretarial turnover is one of this company's biggest problems. The nature of the company's work has necessitated employing secretaries with some college background. Consideration is being given to employing high school graduates with basic secretarial skills and training them for certain secretarial positions. Turnover would be reduced to the extent that these employees possibly have two or three more years available for working than do

employees with college training. This would be the time that present secretarial employees spend attending college.

The assistant to the office manager is developing a pilot program to determine the feasibility of employing high school graduates. A high school secretarial student with a good scholastic record would be employed two or three afternoons a week during her senior year. The assistant to the office manager would instruct her in company policies and procedures, secretarial duties and procedures, and, especially, secretarial refinements as well as provide her with on-the-job office experience. Training would continue on a full-time basis after graduation. When training is completed, the high school trainee would be assigned to a secretarial position.

Case F

Job Improvement Program for Top Clerical Personnel Combined with Supervisory Training for Program Instructors; Two-Year Orientation Program for New Clerical Employees

This growing insurance firm which currently employs 150 clerical employees was established ten years ago. Its training activities are indicative of top management's philosophy toward employee development. In-company activities for clerical office employees include on-the-job training by supervisors and fellow employees and formal training programs for deserving clerical employees, new clerical employees, and junior secretaries. Partial tuition aid is provided for out-of-company training.

In-Company Training

Purpose. Formal training is given to prepare new clerical employees for work in the company and to increase new and permanent clerical employees' knowledge and skill for better job performance. Formal training programs are described below: (1) key women, (2) orientation, and (3) junior secretaries training program.

I. Key Women

Purpose. This program is given to improve job performance of selected permanent clerical employees.

Development. A program for key women was the first planned in-company activity to implement top management's policy for clerical employees. The personnel manager recognized a twofold need: (1) to motivate and stimulate clerical employees' interest in the

company and (2) to recognize those who were making important contributions, within the limits of their positions, to the success of the company.

Implementation of these needs was blocked by department managers' reluctancy to give their approval and assistance. Department managers needed to develop a better understanding of the value of training these employees. The personnel manager approached this problem by encouraging their participation as much as possible. They were invited to participate actively in planning and in executing the program. As a consequence, department managers became more cognizant of training benefits and developed a sense of responsibility for the successful operation and outcome of the program. Their participation in clerical training activities was instrumental in helping them become more receptive toward training and in gaining their support and cooperation.

The first program was established in 1961. Similar programs have continued to be offered every 12 to 18 months.

Responsibility. The personnel manager, who is head of the personnel department, is in charge of developing and administering the training function for clerical office employees. Managers from other departments are invited to assist with these activities. Sessions are conducted by the personnel manager, other company personnel, and representatives from other organizations.

The personnel manager's main job functions deal with employment activities and with administering company benefits. The training function is a minor responsibility. Educational background includes

a college degree with a major in English. Experience includes one year of teaching and several years as a magazine editor prior to becoming personnel manager when the company was being formed.

Other company instructors are frequently department managers, assistants to department managers, supervisors, and executive secretaries. Company personnel and speakers from other organizations are selected by the personnel manager on the basis of their knowledge of a particular subject.

Trainees. Key women are selected from the nonsupervisory group of clerical employees, such as file clerks, typists, receptionists, assistant cashiers, stenographers, and secretaries. Key women are identified by showing all or most of the following qualities in their job performance:

1. They have earned the respect of their co-workers as a result of their interest in their work and the company.
2. Their deep interest and sincere attitude are reflected in their work.
3. They have demonstrated that they can cope with more responsibility and additional work loads beyond present demands.
4. They have shown that they can organize their own work day so as to get the most from it.
5. They are meticulous in their own grooming and expect others to be.

The personnel manager sends a memo to all department managers asking them to submit names of nonsupervisory clerical employees they recommend for the key women training program. The personnel manager then sends a formal invitation to each of these employees inviting each one to participate in the program. Receipt of this invitation

is additional evidence of company recognition. Each group ranges in size from 15 to 20 employees.

Schedule. Trainees meet once a week for a period ranging from 12 to 16 weeks depending upon the number of speakers scheduled. Each meeting is held for one and one-half to two hours, from 9 to about 11 a.m. Meetings are scheduled early in the morning to give trainees the rest of the day in which to share their enthusiasm for the program and their new knowledge with fellow employees. This activity helps to make information feedback more effective.

Physical Facilities. Sessions are held in the sales conference room of the company.

Cost. Program costs have ranged from $22.50 to $37.50 per trainee. All program expenses are included in the cost analysis: supplies, outside speakers' fees, rewards, and refreshments. Cost variation among programs can be attributed mainly to differences in outside speakers' fees, with some making no charge.

Objectives. The primary objectives are to help each employee (1) continue her personal development with the company and (2) be more informed and happier in performing her job duties.

Content and Instructional Methods. Content is concerned with orientation to company policies and procedures, with skill training in job duties and procedures, and with skill training in special secretarial skills and knowledges. The general theme of the program is centered around what a secretary should know. Included are topics specifically related to the company, such as a history of the company's development, an over-all picture of the company's

functions, and a brief analysis of specific clerical jobs. Other topics are more directly related to secretarial functions such as automation, attitudes and responsibility, business letters, good grooming, human relations, money management, stocks and bonds, and telephone usage.

The first meeting gives participants an understanding of program goals. Its agenda include:

Introductions

Information about Key Women Meetings

Key Women Prayer: Prayer by St. Francis of Assisi

Introduction of Each Key Woman by her department manager

Speech by personnel manager: "The Future Is Yours--Key Women"

Salute to Key Women

Closing

As managers are introduced to the group, trainees learn they were the ones who recommended them for training and who were responsible for the establishment of the program. This technique helps to build rapport between the trainee and her department manager.

One part of each succeeding meeting is handled entirely by trainees. Each trainee talks to the group about what she does, the problems of her job, and how her job is related to the functioning of her department. She shows the group samples of her work and answers any questions they may raise about her job. This activity helps trainees develop knowledge and respect for each other's work and gives each trainee an opportunity for self-expression.

The rest of each meeting is reserved for speakers and for discussions with the personnel manager. Speakers are department managers or other company personnel who describe department functions or company activities. At other times, outside speakers are invited to talk on a particular topic of importance to secretaries. Films and other audio-visual aids are often used by these speakers. Subjects and titles of speakers of a recent series of meetings are given below.

Meeting	Subject and Title of Speaker
1	Introduction: Presenting Key Women
2	Good Grooming for Key Women Speaker: representative from modeling agency
3	The Responsibility of Key Women Speaker: professor from nearby university
4	Are You Phonogenic? Films and speaker from telephone company
5	Introduction to Company and Sales Department Speaker: regional administrative assistant
6	Introduction to Accounting Department Speaker: assistant to department manager
7	Introduction to Claims Department Speaker: supervisor
8	Introduction to the Underwriting Department Speaker: supervisor
9	What Makes a Key Woman? Speaker: junior college director of admissions and registration
10	IBM Presents Speaker: company representative
11	Introduction to Policy Department Speaker: department manager

Meeting	Subject and Title of Speaker
12	Introduction to Purchasing Department Speaker: supervisor of shipping and supplies
	Introduction to Foundation Department Speaker: assistant secretary and purchasing agent
13	Introduction to Licensing Department Speaker: assistant secretary and department manager
	Introduction to Personnel Department Speaker: department manager
14	The Key Woman As an Agent for Her Boss Speaker: executive secretary

Trainees are assigned outside reading material. A booklet on a particular secretarial topic is assigned weekly.

Instructional Materials. Booklets on various secretarial subjects are lent to trainees for outside reading assignments. A secretarial procedures textbook is given to each trainee for use in her job.

A brochure describing highlights of the current program is prepared and duplicated by one of the trainees. The brochure is distributed to trainees and serves as a record of their training experience.

Reward. The program culminates with a tea for the trainees. The sales conference room is decorated especially for the occasion. Invitations are extended to everyone who has been connected with the program.

Each trainee receives a framed certificate acknowledging her completion of the program. She is also presented with a rose and with a silver bracelet containing one charm in the form of a key.

The bracelet serves as a further reminder that she is a key woman. Copies of pictures taken during some of the meetings also are distributed to trainees. Pictures taken during the tea are delivered to each trainee as soon as possible.

Evaluation. Trainees assess each session at its close. They anonymously comment about all aspects of the session and how it might be improved. The employment manager uses this information to improve future programs.

The program also benefits supervisory employees by incorporating supervisory activities within its framework. Department representatives gain experience in preparing speeches and in speaking before groups. They learn to think more carefully about their jobs and the function of their departments. Each representative is responsible for preparing his own speech and for selecting and devising whatever visual aids he thinks will be effective. Flow charts, diagrams, and slides frequently are used. Assistance in developing visual aids is given by the art department upon request.

A check is needed to assure the quality of employees' presentations without their feeling any encroachment upon their abilities or job responsibilities. The personnel manager solves this problem in the process of seeking background information for introducing them to trainees. Each representative is asked to submit his complete presentation for the assumed purpose of providing introductory material. At the same time, any speech revisions or changes in visual aids can be handled inoffensively.

Trainees also evaluate the speaker's performance in their reports at the end of each meeting. These appraisals are quickly tabulated in order to send a memo to the speaker within a few hours after his speech. In the memo, the personnel manager compliments the speaker and quotes any laudatory remarks from trainees' appraisals. If the department representative should have any doubts about his presentation, he or she can be reassured by this praise-worthy commentary. Any unfavorable comments are discussed indirectly with the department representative when he or she is invited to speak at another session.

Follow-up. The personnel manager determines the effectiveness of training by examining job performance, job advancement, and course enrollment. Every three months department managers submit reports to the personnel manager appraising job performance and advancement of subordinates. Past reports have shown that employees perform their job activities more efficiently after training. These employees have averaged a $9 weekly salary increase during the first year following their training experience. A few have obtained better positions with other companies. In addition, their enrollment in evening college or adult education courses has reflected program emphasis upon self-development. About two-thirds of each group of trainees have taken outside courses. Most of these courses have dealt with shorthand and typewriting improvement.

II. Orientation Program

Purpose. This program is given to prepare new clerical employees for work in the company and then to improve their job performance when they become permanent clerical employees.

Development. The success of the key women program has given impetus to developing a similar series of meetings for orientating new employees. The purpose of this program is to orient these employees to company policies and procedures and to motivate them toward improving job performance and continuing self-development.

This program is still in its beginning operative stages but is being planned to extend over a two-year period. This time span is designed to give more opportunity for employee motivation and self-development.

Trainees. A new orientation program begins whenever a total of 15 new clerical employees have been employed, usually about once a month. Each group remains together throughout the duration of the program. This arrangement is designed to give its members a sense of belonging, to facilitate program scheduling, and to provide information about employee turnover.

Physical Facilities. Meetings are held in the sales conference room.

Schedule, Content, and Implementation. Program content is concerned with orientation to company policies and procedures and with skill training in special skills and knowledges. The first phase of the two-year program concentrates on organizational information. An hour meeting is held each morning for two weeks. Each meeting

consists of a greeting or a talk by the personnel manager followed by a 30- or a 40-minute speech by a department representative. Speakers discuss their own department functions and activities. The personnel manager also capitalizes upon this situation to provide speakers with the same supervisory training activities used in the key women program. Speakers' presentations are prepared and assessed in the same manner.

The second phase of the program, beginning four weeks later, enhances class training experienced in the first phase and job training provided by trainees' supervisors. An hour meeting dealing with a specific topic is held bimonthly. Personnel from the company or outside organizations are invited to speak about such topics as telephone usage, appearance, human relations, and pension plans. Sometimes several orientation groups attend meetings together to conserve time and energy on the part of all participants.

III. Junior Secretaries Training Program

Purpose. This program is designed to prepare new junior secretaries for work in the company.

Development. This program was developed to help incoming secretaries make the transition from being students one day and employees the next. Class instruction has been integrated with a job rotation plan to prepare new employees for junior secretarial positions. The influence of the company's first training experience, the key women program, upon this program is also evident. This program, too, strives to motivate interest in job performance and in self-development.

Trainees. Trainees are high school secretarial graduates who have no working experience. The best qualified incoming employees are selected as trainees. The number selected is dependent upon company needs. At present, five are being trained.

Schedule. Training begins in June and is completed within a year. Trainees work for a period of six to eight weeks in each department. The length of time spent in each department is determined by each trainee's performance. Trainees also meet with the personnel manager for an hour each week. Meetings are scheduled to fit the personnel manager's schedule. Trainees also participate in the company's orientation program.

Physical Facilities. Class meetings are held in the personnel manager's office or in the sales conference room, depending upon the size of the group or particular facilities needed for the session.

Objectives. The program is designed (1) to prepare trainees for positions as junior secretaries, (2) to motivate trainees to do a good job, and (3) to encourage self-development in trainees culminating in their participation in evening college courses.

Content and Instructional Methods. Program content is concerned with orientation to company policies and procedures, with skill training in secretarial job duties and procedures, and with skill training in special skills and knowledges. Trainees are placed in a series of job assignments. These assignments are planned to include a temporary job in each department. They cover job activities that are important in executing permanent secretarial job responsibilities. Training is conducted on the job by a supervisor appointed by the department's manager.

At weekly meetings, trainees discuss various aspects of their job assignments with the personnel manager. Other clerical employees frequently are invited to these meetings in order to describe their job responsibilities. A representative from the filing department may explain filing procedures, or a statistical typist may instruct trainees in certain operations of her job. Trainees not only gain information about these areas but develop an understanding and an appreciation of other employees' job activities.

Each week trainees are assigned a booklet to read outside of class covering some aspect of what a secretary should know. Upon completion of each job assignment, trainees are also expected to write a description of job activities performed.

Instructional Materials. Booklets on secretarial topics are lent trainees for reading assignments. A secretarial reference textbook is given each trainee to assist her in training and in her permanent position.

Reward. Upon satisfactory completion of the program, the trainee is assigned to a junior secretarial position.

Evaluation. During training, the personnel manager frequently contacts the trainee's supervisor to learn how she is doing and to help her overcome any reported deficiencies.

Out-of-Company Training

A refund of 50 per cent of tuition is available for any course satisfactorily completed at an accredited institution. Reimbursement is provided for any course that is considered valuable to the

employee's self-development. Employees are eligible to register for a course after three months of company service.

The personnel manager helps to encourage employee participation in evening courses. Memos are sent to employees announcing forthcoming courses at nearby institutions. Later an interoffice bulletin lists the names of each employee who has completed a course(s) along with identification of the particular course(s) and institution.

Case G

Companywide Orientation and Telephone Usage Programs

This bank is in the process of reorganizing its training activities. Its 400 clerical employees are trained on the job by their supervisors, supplemented with courses provided by the training staff and with financial assistance for out-of-company training. All clerical employees attend a companywide basics course and a telephone improvement program. These training activities also serve as part of an orientation program for new employees. In addition, a program especially designed for stenographers and secretaries is being developed.

In-Company Training

Purpose. Formal training is given to prepare new clerical employees for work in the company and to increase permanent clerical employees' knowledge and skill for better job performance. New and permanent secretaries soon will be given additional formal training to prepare them for work in the company or to prepare them for better job performance or for job advancement, respectively.

Development. In the fall of 1963, top management of this bank appointed an officer experienced in systems and organizational planning to oversee its training activities. Present training activities for clerical employees are being revised to some extent and new ones are being introduced to fill other current needs. When these needs have been implemented more fully, the training officer's main concern will be with long-range employee development. Other

staff members will handle immediate training needs. Installation of a new computer will soon be affecting the knowledge and skill requirements of a number of employees. The training officer plans to prepare for future changes by providing retraining and development programs.

Responsibility. Training personnel in the bank's planning and personnel department serve as staff advisors to department heads and are authorized to implement training needs with formalized courses. Department heads and supervisors within departments are responsible for training their subordinates and for ascertaining that they have attained the desired objectives of any formal training. Supervisors carry out their on-the-job training responsibilities with varying degrees of success. A supervisory development program is being planned to help supervisors of all levels perform managerial duties more effectively. Part of this program will focus on techniques concerned with on-the-job instruction.

Physical Facilities. Training activities are held in one of the bank's conference rooms. A wide range of training aids are available for instructional purposes.

Cost. The establishment of a budget has been recommended by the training officer. At present, all training expenses are approved by top management. Their attitude is that more money needs to be spent on training activities.

Programs. Formal training activities are described below: (1) orientation, (2) basics course, (3) telephone improvement program, and (4) future training plans.

I. Orientation

Purpose. This program prepares all new clerical employees for work in the company.

Objectives. The program is designed to provide trainees with knowledge of the company's policies, procedures, and operations; of job duties; and of telephone techniques.

Content and Implementation. Program content is concerned with orientation to company policies and procedures, skill training in job duties and procedures, and skill training in telephone techniques. This information is presented through supervised on-the-job training, a movie session, a basics course, and a telephone session.

First, new clerical employees are introduced to company officials. Next, they are sent to their assigned departments for orientation training. Department heads and section heads give them a brief introduction to the bank's history and organizational set up and provide them with whatever on-the-job training they think necessary. Check lists of points to be covered in job training have been prepared by each department head as a training aid.

As soon after employment as possible, new employees attend the basics course plus a 90-minute showing of three movies about the bank's activities. These movies are shown once a month for recently hired employees. The training officer has augmented this program with a new companywide telephone improvement session and by distributing a guidebook which describes company policies. The basics course and the telephone session are described below.

II. Basics Course

Purpose. This course prepares new clerical employees for work in the company or improves permanent employees' job performance.

Development. This course was instituted to acquaint new employees with some fundamental aspects of the bank's operations. All employees who have joined the bank since March 1963 have attended.

Meanwhile employees who had been employed by the bank before this time began showing considerable interest in this course. As a result, the training officer recently offered this course to any employee who wished to enroll. Employees' enthusiasm for the course plus the importance of this information for all employees, either as a new subject or as a refresher, has resulted in the training officer now requesting that all employees enroll. Plans now are being made to conduct this course for those employees who previously have not attended. First, classes will be held for employees with 15 or more years of service; then, for all other employees who have not attended.

Responsibility. A bank officer, whose job functions include training activities that involve about 30 per cent of his time, administers and conducts this course. Two other bank officers assist as guest lecturers.

Schedule. The course consists of a weekly one-hour session held for nine weeks. At times certain sessions cover areas that involve participants' own job activities. In these instances, only the first five sessions are scheduled.

Since the course is beneficial to the company's operation as well as to employees' job performance, both share class time. With the working day ending at 4:30 p.m., classes are scheduled from 4 to 5 p.m.

Trainees. All employees are required to attend this course. New employees attend this course as part of their orientation program.

No more than 20 employees may attend a class. Classes with 15 to 17 members are preferred. When the course was first offered, experimentation with class size was carried on. Classes containing 20 to 25 members were found to be too large for optimum class participation and those containing less than 12, too small.

Objectives. An over-all understanding of the bank's functions is presented.

Content and Implementation. Program content is concerned with orientation to bank policies and procedures. The first five sessions are held on the following subjects: bonds, stocks, other property and trust accounting methods, types of trust accounts, and history of a typical trust account. The next three sessions cover the complete cycle of the purchase and sale of securities. The ninth session is a tour of those departments involved in this cycle. Instructional methods used are lecture, discussion, and demonstration techniques. Instructional materials are prepared by training personnel. Trainees are given reference materials concerning the subjects presented. No evaluations of participants' course performance are made by training personnel.

III. Telephone Improvement Program

Purpose. This program is given to prepare new employees for work in the company or to improve permanent employees' job performance.

Development. This program, consisting of a periodic telephone session, has been added recently to the training activities of this bank. It is designed to improve internal business communications and employees' relations with customers.

A representative from the telephone company helped to develop the program by conducting the first six sessions. All officers, secretaries, and customer contact employees attended one of these sessions. Films and flip charts were used as instructional aids. With this experience as a guide, the training staff embarked on its own program.

Responsibility. The program is developed and administered by the training staff. Each telephone session is conducted by a member of the training staff.

Trainees. All employees are required to attend a session every 12 to 18 months. New employees attend during their orientation training. Class size is limited to 25 employees in order to minimize disruption of job activities.

Schedule. Sessions are held when needed. Each session is two hours in length and held during working hours.

Objectives. The program is designed (1) to train employees in correct telephone usage and (2) to remind them constantly to maintain satisfactory telephone performance.

Content and Instructional Methods and Materials. Program content is concerned with skill training in telephone techniques. In each session, the main points of telephone usage are presented with the aid of flip charts. Tapes of poor telephone practices serve to highlight these points. These tapes consist of six humorous dramatizations prepared by several company employees. Pamphlets, such as You Are the Bank published by the American Banking Association, are given to each participant. Films provided by the telephone company were omitted for two reasons: (1) subject presentation is felt to be more effective with the aid of flip charts and (2) films are thought to impede retention by containing too much material.

Evaluation. After the session, telephone performance is observed and evaluated subjectively by trainees' supervisors. They verbally report that trainees immediately exhibit outstanding improvement but gradually return to their previous practices.

Follow-up. An attempt is made to help employees maintain satisfactory telephone usage by requiring that they periodically attend a telephone session. Various aids are being devised to remind employees about their telephone performance during the interim between sessions. Decals will be placed on telephones with slogans such as "courtesy is our business." Reminders will be included in the company's house organ. Visits will be made to the switchboard room.

IV. Future Training Plans

A secretarial training program is being planned by three senior secretaries, the secretary to the chairman of the board of directors, and a representative from the American Management Association. The purpose of the program is to prepare incoming secretarial employees for work in the bank, to improve job performance of permanent secretarial employees, and, when possible, to prepare permanent secretarial employees for job advancement.

Program content is to be concerned with skill training in secretarial job duties and procedures. A series of courses will be offered on a continuous basis. The program will begin with a basics course for incoming stenographers and secretaries and will culminate with a highly specialized one for senior secretaries. All stenographers and secretaries will be required to attend four one-hour sessions of a course suited to their level of job responsibility. Senior secretaries will attend the first course that now is being developed. Their suggestions and criticisms will be sought to help modify the present course to meet the needs of other secretarial and stenographic classifications.

Out-of-Company Training

The training staff combines in-company training activities with an out-of-company education and tuition refund program. The purposes of the out-of-company program, as given in a written statement of policy, are:

1. To provide encouragement through financial assistance to those permanent employees who wish to increase their value to themselves and to the bank through outside study in business courses related to their work.

2. To encourage all employees to develop themselves on their present jobs and to prepare themselves for more responsible work.

3. To provide a way for supervisors at all levels to assume active responsibility for planned training and development.

4. To recognize that the rapidly changing conditions in the banking field, and the changing personnel needs within the bank itself, require both new knowledge and new skills which can be gained through education.

Division and department heads are responsible for recommending courses to their subordinates which in their judgment will contribute significantly to the development of their departments and the personnel involved. Final approval for all tuition refund is made by the training staff.

Employees are offered three tuition refund plans. Plan 1 offers aid for courses judged to be directly related to the employee's present position. A maximum refund of $100 per semester and $200 per calendar year is provided.

Plan 2 offers aid for courses judged to be of value for the employee's future advancement. A refund of 50 per cent of tuition up to a maximum of $50 per semester and $100 per calendar year is provided.

Employees are eligible to apply for either of these plans immediately after joining the firm. Tuition refund is dependent upon fulfillment of the following requirements:

1. The employee's total work record justifies this special assistance by the bank.

2. Course or courses are taken at the request, or with approval, of the bank.

3. Course or courses are completed with a passing grade or its equivalent.

Plan 3 is offered to employees who wish to study at night for a terminal degree at an accredited college or university. Employees who have completed at least one year of employment and who show evidence of potential for future advancement in the bank are eligible. A refund equal to one-half of the tuition up to a maximum of $300 per year is provided. In addition, an amount equal to one-half of the tuition up to a maximum of $300 is loaned if needed.

The employee signs an official note for the loan. No interest is charged. After the degree has been awarded, and as long as the employee remains with the bank, the bank will reduce the amount of the note each year by the average annual amount loaned until the face value of the note is reduced to zero. If termination of employment should occur prior to the full cancellation of the note, for reasons not acceptable to the bank, the employee then is held responsible for repayment of the outstanding balance of the note.

II. Companies with Skill Training in Special Skills and Knowledges in Addition to Other Types of Training

In Cases H through Q, programs for clerical employees include extensive skill training in those special skills and knowledges that are instrumental in rendering satisfactory job performance. The majority of these companies also conduct orientation to company policies and procedures and skill training in job duties and procedures. In addition, two of these companies include general education courses.

In Cases H, I, J, and K, most of the programs are designed to prepare new secretarial employees for work in the company. These programs include orientation to company policies and procedures and skill training in job duties and procedures as well as skill training in basic skill deficiencies and in new technical skills required for job assignments. Various amounts of class instruction are combined with supervised on-the-job training. Case K also provides class instruction that is designed to improve some permanent clerical employees' job performance. Case J is planning to conduct similar training for permanent secretaries.

In Cases L and M, formal training programs concerned with preparing new clerical employees for work in the company as well as with improving job performance of permanent clerical employees are common. Case L uses a rotation plan to train new clerical employees in company information and in job duties. Case M provides all incoming clerical employees with an orientation session and with supervised

on-the-job training. Additional training is given to new employees employed to perform secretarial functions. These employees receive extensive training in job duties and in skill deficiencies through stenographic-pool and loan-out assignments. Cases L and M also provide their permanent employees with secretarial skill courses and general education courses. These courses are given to improve job performance in both cases and to broaden general educational background in Case M.

In Cases N through Q, programs are also conducted for job advancement purposes. Case N provides new employees soon to be assigned to the company's secretarial pool with vestibule training in job duties and in basic skills. Permanent employees classified as typists, stenographers, and secretaries are offered secretarial skill courses for job improvement and/or for job advancement purposes. Case O offers permanent employees comptometer training for job advancement. Any other training needed for job improvement or for job advancement is completed at a secretarial school through special company arrangements. Case P offers typewriting instruction to new and to permanent clerical employees for present or future job needs. A comptometer program and additional typewriting programs will soon be offered these employees. Case Q provides new employees with the necessary skills needed to qualify as key punch operators. Permanent clerical employees are offered a wide range of secretarial skill subjects. These courses are given to help employees meet present or future job needs. An additional program for secretaries is being planned.

Case H

Vestibule Training Combined with Secretarial Loan-Out Service to Other Departments

One of the divisions of a large multi-unit electronics firm employing 400 clerical employees conducts formal training activities for new employees classified as clerk typists, stenographers, and secretaries. These employees participate in a secretarial training program or attend a series of secretarial lectures. Other new clerical employees as well as permanent clerical employees promoted to new clerical positions learn their job duties on the job guided preferably by predecessors or, when not possible, by fellow employees and/or supervisors.

No formal training is provided for permanent employees, but tuition aid is available for out-of-company training. The employment coordinator prefers to have schools fulfill their training needs for two reasons:

1. The division cannot provide comparable educational offerings on a part-time basis.
2. No one in the personnel department, including the employment coordinator, has taken educational courses to qualify them professionally in this area.

The other divisions located in the area do not provide any clerical training programs. A decentralized form of organization gives each division responsibility for its own in-company educational activities. Differences in training practices among divisions reflect different local employment situations and personnel management views on training.

In-Company Training

Purpose. Formal training is given to prepare new clerical employees for work in the company.

Development of Secretarial Training Programs. Continual shortage of trained, experienced secretaries in the local area prevented this division from filling vacancies through its usual avenues. These vacancies were caused by regular turnover and office expansion. The employment coordinator of the division was aware of training programs that several companies were providing for their engineering and management personnel and decided to provide similar training for beginning secretaries.

In 1958, the employment coordinator assisted by the technical typewriting supervisor established a secretarial training program for June graduates from nearby schools. Provision also was made to conduct the same program at other times of the year if a large group of secretarial employees should need to be employed at one time.

The operation of the program resolved the original problem. Many outstanding applicants became available. Other benefits also ensued: Supervisors became more satisfied with clerical assistance and more assured of their ability. Requests for secretarial assistance were filled by the loan-out phase of the program. The success of the program has warranted its continuation. The program has remained basically unchanged in its original objectives and format.

Also instituted at the same time was a series of orientation lectures for clerical employees. This program was designed for employees joining the company when no secretarial training program was in process. Employment of only a few employees at one time makes it unfeasible to offer a secretarial training program.

Responsibility. The employment coordinator in the personnel department is responsible for developing and operating training programs for female clerical workers. Sessions are conducted by the employment coordinator, supervisory personnel from other departments, and a high school business education teacher.

The employment coordinator is responsible to the personnel manager. Main job functions of the employment coordinator are complete responsibility for employing female employees and for administering and organizing formal training activities for them. Minor job functions include conducting formal training activities for these employees and providing them with any needed guidance regarding job bidding or their personal and business problems. Educational background of the employment coordinator includes a college degree in psychology, completion of one year of a graduate management program for women, and partial completion of a master's degree in business administration. Experience consists of ten years of personnel supervision, mostly in the present situation.

The technical shorthand instructor is employed full time as a regular business teacher in a local high school. Background includes a college degree in business education and five years of teaching experience.

The technical typewriting instructor supervises office practice sessions. This instructor's main job responsibility is acting as supervisor of the technical typewriting department. Background includes one year of business training beyond high school, 15 years of previous business teaching experience, and eight years of company service.

Lecturers are supervisory personnel from different departments. They are selected on the basis of having shown command of themselves and their positions. Selected lecturers usually are both college graduates and long-term employees.

Physical Facilities. Lectures and shorthand sessions are presented in company conference rooms or offices of the personnel department. Technical typewriting and office practice sessions are set up, when needed, in a partitioned section of a large room in the technical typewriting department. Electric typewriters and desks also are supplied by this department.

Cost. The only visible expense of the programs is the salary of the high school teacher employed to teach the technical shorthand course in the secretarial training program. All other instruction is given by company personnel. Needed facilities and supplies are already available within the company.

The employment coordinator has estimated that a daily average of one-and-a-half-man days is needed to operate the secretarial training program. This estimate includes the services of the employment coordinator, instructors, lecturers, and clerical help. No other cost estimates have been made regarding clerical employee training.

Programs. Formal training activities are described below: (1) secretarial training program and (2) secretarial group lectures.

I. Secretarial Training Program

Purpose. This program prepares June secretarial graduates for permanent stenographic or secretarial positions within the company. The same program is offered at other times of the year when 15 or more new secretarial employees need to be employed at one time.

Trainees. The employment coordinator seeks applicants for the program by sending letters asking placement directors of high schools, junior colleges, and secretarial schools to recommend capable secretarial students. The employment coordinator follows up letters with telephone calls and school visits. Interested applicants are invited to tour the company.

During their tour, applicants see typical secretarial offices, observe the computer in operation, and visit engineering laboratories. The tour is preceded by welcoming remarks from the personnel manager followed by a question-and-answer period and refreshments. The visit gives applicants and the company an opportunity to assess one another.

From among these applicants, trainees are selected on the basis of (1) well-above average grades, (2) recommendations from school instructors, and (3) satisfactory scores on company skill and intelligence tests. Skill requirements are a minimum shorthand speed of 80 words per minute and a typewriting speed ranging from 35 words per minute to 70 words per minute depending upon clerical classification.

Trainees with education beyond high school are preferred because they usually handle assignments more maturely.

From 16 to 25 qualified applicants are selected as secretarial trainees. The number selected is dependent upon company's needs.

Objectives. Objectives of the program are:

1. To orient the trainee in company procedures and organization.
2. To train in technical shorthand and typewriting skills and office practices.
3. To give the trainee a chance to adjust to a new working environment and to establish contact with the employment coordinator to whom she can go for advice and help when problems or questions arise.
4. To give the trainee an opportunity to try out various jobs so that she is permanently assigned to a job that she knows she wants.
5. To give the supervisors more time to evaluate a trainee than is possible during a brief interview.
6. To provide the company with trained people to help in filling requests for secretarial assistance caused by vacations, job openings, and excessive work loads rather than to utilize temporary help.
7. To help the trainee develop good attitudes toward work.
8. To relieve the shortage of trained, experienced personnel needed for permanent positions.

Schedule and Content. Program content includes orientation to company policies and procedures, skill training in secretarial duties and procedures, and skill training in technical typewriting and shorthand. The program begins the middle of June and meets every day from 8:00 a.m. to 4:30 p.m. for a minimum of three weeks. The first two weeks of the program combine vestibule training and on-the-job

training. Company and office procedures and policies, specialized terminology, shorthand, typewriting, machine transcription, and reproduction processes are covered. Vestibule training provides opportunity for mastering office procedures in an atmosphere relatively free from work pressures. The third and succeeding weeks consist exclusively of loan-out assignments. These assignments continue until the trainee is assigned permanently, usually within five or six weeks. The program is set up as follows:

First Week. Monday is devoted to an orientation of company policies and procedures and an explanation of the program. Tuesday through Friday covers lectures and practice sessions in shorthand, typewriting, and office practice. These activities are scheduled as follows:

8:00 - 9:00 a.m.	Lecture session
9:00 - 10:45	Technical typewriting instruction
10:45 - 11:45	Technical shorthand instruction
11:45 - 12:30 p.m.	Lunch
12:30 - 4:30	Practice session for office activities

Second Week. On Monday, Wednesday, and Friday, the above schedule is followed. On Tuesday and Thursday, on-the-job training activities follow the first lecture session.

Third Week and Succeeding Weeks. On-the-job training assignments are scheduled.

Training activities are described briefly below: (A) lecture sessions, (B) technical typewriting, (C) technical shorthand instruction, (D) practice sessions for office activities, and (E) on-the-job training.

A. Lecture Sessions

The employment coordinator and selected supervisory personnel talk on company services, departmental organization, and office procedures. Lectures on services are supplemented by trips to company library, wire service room, and switchboard room. Lectures are followed up with class discussion periods and with written assignments based upon lecture presentations. These assignments are completed in the office practice sessions.

B. Technical Typewriting Instruction

The technical typewriting supervisor explains the Greek alphabet, technical typewriting format, mathematics symbols, and special technical typewriting assignments. Company material is used as a basis for reference and practice purposes.

C. Technical Shorthand Instruction

A high school business teacher drills on electronic terms and abbreviations along with their shorthand outlines and dictates technical material. No attempt is made to improve basic shorthand skills. The instructor

has devised shorthand outlines for technical words and has used company correspondence in developing technical dictation material.

D. Practice Sessions for Office Activities

The technical typewriting supervisor conducts these sessions. The following office activities are included:

1. Practice is given in technical and non-technical dictation, shorthand and dictaphone transcription, and typewriting assignments. Practice work is used for beginning assignments followed by live work supplied by other departments.

2. A guide, "Project Kno-How," is developed by each trainee covering company policies and procedures. The guide is used during the program and as a ready reference for permanent assignments.

3. Instruction and practice are given in reproduction processes used in the company.

4. Written assignments based on lecture topics are completed.

E. On-the-Job Training

During the second week, trainees are ready to apply their knowledge and skill to an actual office situation. On Tuesday and Thursday, after the first morning lecture session, trainees are placed on loan-out assignments. During the third week and succeeding weeks, trainees are loaned out all day.

Loan-out assignments involve sending trainees to work in departments needing secretaries. Assignments are rotated in order to expose trainees to as many company procedures as possible during the training period. If the trainee is particularly happy in one assignment, and the supervisor with her, the trainee may be permitted to remain in this assignment during the entire loan-out period.

The loan-out period is advantageous both to trainees and to supervisors. Trainees gain firsthand information by working in several departments. They learn in which areas they might like to work when eligible to bid on permanent jobs. In addition, supervisors are provided with extra clerical help. At the same time they have an opportunity to evaluate each trainee's job performance and to consider an assigned trainee for any permanent opening available within their jurisdiction.

Reward. At the end of the program's third week, trainees are eligible to bid on a permanent position. The employment coordinator gives them a list of positions to bid on. "Bidding" is the procedure in which a trainee submits a written statement to the employment coordinator specifying her job choice and supporting it with one or two reasons.

Trainees are encouraged to bid on suitable permanent stenographic and secretarial positions. Education, experience, and employment test performance determine employee classification. The employment

coordinator assists each trainee by discussing job preferences and qualifications with her. Trainees may bid on as many jobs as they wish. Most of them bid only on one or two jobs.

About 50 per cent of the trainees apply for a permanent position as soon as they are eligible. Others continue on a loan-out basis for an indefinite time until they find a particularly appealing position for which they qualify. The latter group of trainees benefits by having a greater number of job assignments upon which to base a selection. Moreover, the company can always use temporary clerical assistance. Supervisors do not have to take time to orient them. Usually all trainees are placed within five or six weeks after they are eligible for permanent assignments.

Evaluation. During class activities, trainees are given shorthand and typewriting tests. Tests are graded and returned to trainees to point out areas which need improvement. Extra work is assigned accordingly. Performance in office practice activities also provides further opportunity for trainees to be corrected and evaluated. Correction of performance deficiencies becomes almost impossible to carry out once trainees are permanently assigned. The employment coordinator reports that supervisors generally find it difficult to give honest evaluations of their employees.

Supervisors evaluate trainees that are assigned to them on loan-out. Written evaluations of trainees' performance and attitudes exhibited on the job are given to the employment coordinator. They are used as guides in assessing each trainee's progress, in

determining how she performs in an environment outside of the training program, and in counseling her when selecting a permanent position.

A report of each training program is sent as an interoffice memo to interested management personnel. The report briefly describes the program with regard to its format, achievements, and number of trainees.

Follow-up. After trainees have been assigned permanently, they are followed up in two ways:

1. The employment coordinator informally checks with each former trainee's supervisor to determine if job performance is satisfactory.
2. Former trainees return to the employment coordinator whenever they have any problems or need guidance.

This information is used by the employment coordinator in helping a former trainee make a better occupational adjustment in her present position or, if necessary, in transferring her to another position. This information also helps the employment coordinator in assessing the effectiveness of the secretarial training program and in becoming aware of any changes or additions needed to be made in the program.

II. Secretarial Group Lectures

Purpose. A lecture series is given to other new clerical personnel, including new secretaries employed at other times during the year, in order to prepare them for work in the company.

Trainees. This program is presented to recently employed clerk typists, stenographers, secretaries, and senior secretaries. The

secretarial training program described above is not offered when one or two secretarial employees are hired at one time.

When a lecture series is to be held, the employment coordinator sends the following notifications:

1. A note is sent to the supervisor of each eligible employee requesting her absence from the department.
2. A note is sent to each lecturer confirming his or her speaking date. The lecturer is reminded to allow time for employees' questions in the half hour allotted.
3. A note is sent to each eligible employee inviting her to attend the lecture series. A lecture schedule is included with the note.

Clerical employees who joined the company after the last lecture series was held are invited to attend. These employees were placed in permanent positions as soon as they joined the firm. When the invitation is received, they may have been with the company only one day or as long as two months.

Employees participating in the lecture series learn their job duties from predecessors, when possible, or fellow employees and supervisors. If the predecessor is transferred to another job before her replacement arrives, she occasionally is requested to leave written instructions describing the job's duties. This method is not too satisfactory, for many clerical employees lack ability to organize their activities or to express job instructions in writing.

Schedule. The lecture series is offered when 6 to 18 employees are eligible to attend. The company's turnover rate and expansion needs determine employment requirements and, as a consequence, how frequently the program is offered.

Lectures are held from 9 to 10 a.m. for four days, Tuesday through Friday. Two lectures are scheduled for each session.

Objectives. The program is designed to acquaint trainees with the company's organization, purpose, procedures, and paperwork.

Content and Implementation. The lecture series is concerned with orientation to company policies and procedures and with skill training in job duties and procedures. Each lecturer is allotted a half hour in which to present his or her subject and to answer trainees' questions. These lectures are similar in content to those presented in the secretarial training program but are presented in less time. This is possible because these trainees have gained some prior knowledge of the material to be covered in the process of executing their job duties. In each session, coffee is served as the second lecture is being presented.

The lecture schedule given below shows the program arrangement and identifies the various subjects.

Day	Starting Time	Subject
Tuesday	9:00 a.m.	Petty Cash and Reservations
	9:30	Payroll
Wednesday	9:00	Facilities and Services
	9:30	Purchasing and Subcontract Administration
Thursday	9:00	Marketing
	9:30	Personnel
Friday	9:00	Engineering
	9:30	The Executive Secretary

Evaluation. Upon completion of the lecture series, trainees are asked to write a letter to the employment coordinator constructively criticizing the series. Their comments have resulted in making lectures more specific and in shortening the length of the program from ten hours to four hours. This change was possible because most of these trainees have already gained some knowledge of the firm's procedures and policies before attending the lecture series.

Comments from trainees also indicate that they would like to have secretaries from various departments describe their work and provide them with helpful hints. Trainees seem to prefer lectures which provide information immediately applicable to their present jobs. On the other hand, the employment coordinator prefers that trainees be given an over-all understanding of the division's background, organization, and functions. The employment coordinator attempts to fulfill both needs by requesting lecturers to provide information that will help trainees now as well as in the future.

Out-of-Company Training

Tuition aid is available to all employees for any course satisfactorily completed. The company pays all tuition costs if the course is directly related to the employee's present work. If not, the company pays 50 per cent of the tuition charges. If the course is to prepare the employee for a future position within the company, the employee will be reimbursed for the other 50 per cent when promoted to this position.

All courses must be approved by the empoyee's supervisor before course registration if the employee wishes to qualify for tuition aid. A maximum of two courses may be taken at the same time. No limit has been established concerning how many courses employees may take over a period of time. Employees may enroll in one or two courses three months after joining the company.

Case I

Vestibule Training Combined with Supervised On-the-Job Training for Medical Transcriptionists

The medical records department of a hospital employing over 500 clerical employees has a formal training program for medical transcriptionists. All other clerical employees are given on-the-job training by their supervisors and fellow employees. No tuition aid is provided for out-of-company activities.

In-Company Training

Purpose. Formal training is given to prepare new medical transcriptionists for work in the hospital. The program provided for these employees is described below.

Development. A director with a staff of four assistants is in charge of the department's 86 full-time and 18 part-time clerical employees. Each assistant functions as an advisor to one or two of the department's seven sections and may be responsible for one or several special projects. A supervisor, who is directly responsible to the director, is assigned to each section to direct its activities.

This department experiences a high turnover rate among employees in the transcription section and difficulty in finding qualified replacements. These employees are classified as medical transcriptionists. The technical nature of their work limits employment to high school or junior college graduates with training or experience in this area.

In 1957, the director of the medical records department, the transcription section supervisor of the same department, and the personnel director developed a program to prepare selected employees as medical transcriptionists. Class instruction combined with on-the-job training were incorporated into a 12-month training program. This program succeeded in keeping the department supplied with medical transcriptionists and has continued to be offered each year. Trainees who complete the program are not long-term employees. Their new training and experience place them in demand for secretarial positions in doctors' offices.

Responsibility. The operation of the program and its future development are the responsibilities of one of the director's staff assistants, the assistant medical records librarian. The teaching function is shared by the assistant librarian and the transcription section supervisor. Both these employees are familiar with all aspects of the program. One teaches the first hour and a half of the morning class; the other, the second hour and a half. The afternoon session is conducted by the transcription section supervisor.

The assistant librarian performs the training function as a major responsibility. Minor responsibilities include acting as an advisor both to the department's transcription section and to its correspondence section. The assistant librarian has a B. S. degree in medical record administration. College preparation included no education courses; typewriting was taken as an elective. Hospital work experience was required in the fourth year of college and

included experience as a medical transcriptionist. Upon graduation from college, the assistant librarian accepted her present position and is completing her fourth year in this capacity.

The transcription section supervisor's major responsibility is directing the section's activities. Minor job responsibilities include clerical instruction. The supervisor teaches half of the formal classes and handles on-the-job training activities. The supervisor is a high school graduate with ten years of prior experience as a medical transcriptionist and six years of experience in her present position.

Trainees. Trainees must be recent high school graduates with good scholastic records, ability to spell, and excellent typewriting skills. A school grade of A or B in typewriting is required. Of 11 trainees selected for the 1964 program, nine trainees were high school graduates; and two had completed one year of junior college.

Information about the program is passed along by word of mouth. A person who is interested in becoming a trainee makes initial application to the personnel department. In March, April, and May, the personnel director tentatively selects candidates on the basis of interviews and scholastic achievements. Final selection is made by the assistant librarian. Trainees are processed as regular employees by the personnel department. They are assigned to the medical records department as "transcription trainees."

The number of trainees that are accepted is dependent upon the number of vacancies in the transcription section. In 1964, 11 trainees were selected from among 30 applicants. Six trainees were

needed to fill vacancies; and five trainees, to increase the number of transcriptionists from a total of 17 to 22.

The first three months of the program are considered a probationary period. Only two trainees have proved unsatisfactory since the program was started. Trainees are expected to remain in the transcription section for a minimum of six months after completion of the 12-month training program. After that time, they may be considered for other positions within the hospital.

Schedule. Each June a new program begins. Every day during the first six months of training, trainees attend classes from 9 a.m. to 12 n. and work in the transcription section from 1 p.m. to 5 p.m. The second six months is spent working all day in the transcription section and periodically attending review classes.

Physical Facilities. Class instruction is held in one of the hospital's classrooms. All other activities are executed in the department's transcription section.

Cost. Training expenses are charged to the budget of the medical records department. These expenses consist of trainees' salaries and instructional materials.

Trainees' salaries are the main expense. Starting salary is $52 weekly for a three-month trial period. Increases are given quarterly until $64 is reached. Further increases are given on merit.

Expenditures for instructional materials are minimal. Most of these materials were purchased several years ago. Trainees purchase their own books.

Objectives. The program is designed:

1. To orient the trainee to hospital policies and procedures for employees.

2. To familiarize the trainee with functions of the medical records department and with how these functions serve the hospital's needs.

3. To provide the trainee with a working knowledge of the job duties of a medical transcriptionist.

4. To provide the trainee with a knowledge of the fundamentals of medical science such as diseases, their cause and treatment, and familiarization with drug terms.

5. To help the trainee develop proficiency in medical machine transcription.

Content. Program content consists of orientation to hospital policies and procedures, skill training in job duties and procedures, and skill training in medical science and machine transcription. The first six months consist of class instruction and on-the-job training activities; the second six months is devoted primarily to on-the-job training activities with review classes. These activities are described below.

Classroom instruction is presented in three consecutive parts. Part 1 presents an over-all view of the hospital and its activities. Special emphasis is placed upon the functions of the medical records department and the duties and the responsibilities of the transcriptionist. Part 2 covers spelling; meanings of general medical terms, prefixes, and suffixes; and sample case histories. Part 3 is devoted to study of various parts of the physical systems such as the eye and the ear. Each system is discussed in terms of its general anatomy, physiology, and terminology.

On-the-job training consists of practice sessions and supervised job assignments. First, material that needs to be retyped is assigned. This work familiarizes trainees with medical form and terminology. Within a short time, this work is replaced by machine transcription practice. The content of this dictation stresses the subject discussed in the morning class. As trainees increase their proficiency in practice machine transcription work, they gradually are assigned live machine work. During the second six months, live machine work increases in complexity.

Review classes are presented in the second six months and supplement live transcription work. Knowledge of medical terminology and recent developments in medical and surgical procedures are covered.

Instructional Methods. In classroom sessions, lecture, demonstration, and discussion techniques are used. Motion picture films and observations of medical operations supplement these methods.

On-the-job training activities are supervised on an individual basis. Sometimes lecture and demonstration methods are used. Trainees also assist each other by answering questions about transcription assignments.

Instructional Materials. Each trainee is given a mimeographed course outline prepared by the assistant librarian and purchases her own standard medical dictionary and physician's handbook. Other medical dictionaries and handbooks are available for reference in the assistant librarian's office and in the transcription section.

Instructional aids for class sessions include (1) motion picture films, filmstrips, and slides from hospitals, American Medical Association, and Encyclopaedia Britannica, Inc. and (2) plastic models of the ear, spinal cord, knee joint, and kidney. Other materials such as booklets, charts, pictures, and posters are obtained from drug companies. These aids are given to trainees or are used for class demonstration.

Reward. Upon completion of the program, trainees are classified as "medical stenographers" and are permanently assigned to the transcription section. At the present time, no other recognition of satisfactory course completion is given. The assistant librarian is contemplating awarding a certificate to future trainees.

Evaluation. Frequent short, objective quizzes check understanding of subject matter covered in class sessions. A record of the amount of practice work and regular job assignments completed in the transcription section is kept by the supervisor. The quality of this work is discussed informally with each trainee.

Case J

Vestibule Training Combined with Secretarial Loan-Out Service for Prospective Technical Secretaries

This multi-unit electronics firm employing over 500 clerical employees trains new secretarial employees by combining class instruction and on-the-job training with a secretarial service for other departments. Other new clerical employees, such as typists, and all permanent clerical employees promoted to new positions learn their clerical assignments on the job with the aid of a supervisor or fellow employee and a company secretarial and stenographic reference manual. Clerical employees selected to perform as leaders of secretarial services groups in other plants are individually trained. A company course will soon be offered to permanent secretarial employees to help them increase their efficiency on the job. Tuition assistance for out-of-company training is available to employees with permanent assignments.

In-Company Training

Purpose. Formal training is given to prepare new secretaries for work in the company. Permanent secretarial employees will soon be offered training to help them improve their job performance. Described below are (1) new employee secretarial training program and (2) future training plans.

I. New Employee Secretarial Training Program

Development. Two years ago the operation of the clerical function was being impeded by a shortage of temporary clerical personnel and well-qualified permanent replacements and by poor performance of present secretarial employees. Help from temporary employment agencies lacked required security clearance, knowledge of internal business procedures, technical dictation skills, and instant availability. New secretarial employees without any previous experience were placed immediately in permanent secretarial positions and learned their job duties by trial and error. No opportunity was available for the company to evaluate their potential secretarial performance before permanent placement. In addition, no standardization of office procedures or secretarial guides existed to help increase and maintain the efficiency of the clerical force.

Management was able to minimize these problems by integrating a training program with the functions of a secretarial training and services group. A business teacher was employed to prepare a company secretarial manual and devise a training program for new secretarial employees with no previous experience. Development of these activities resulted in supplying the company with temporary help and with a source of well-qualified replacements. A centralized secretarial training and services group located in the administrative services department was established in 1962 to handle these activities.

The success of this services group is evidenced (1) by the subsequent establishment of a secretarial services group in each of two nearby plants, (2) by requiring all new secretarial employees to

participate in the training program in conjunction with a strict promotion from within policy, and (3) by planning to extend training opportunities to long-term secretarial employees designed to increase their job know-how and upgrade performance.

Responsibility. The secretarial training and services group is part of the administrative services department. Its group leader is directly responsible to the section chief who in turn reports to the manager of the department. The group leader has been given complete responsibility for developing and operating the secretarial training and services group. Main job activities include:

1. Training employees for positions as beginning secretaries and for positions as leaders of services groups in two other company plants.
2. Supervising the over-all activities of services groups in two other plants.
3. Assisting departments throughout the company in handling their peak clerical loads.
4. Providing temporary or emergency secretarial services to any department during the absence of a regular secretary.
5. Helping maintain the continuous efficiency of the secretarial force.

The group leader is a former business education teacher. Educational preparation includes a B. S. degree in business education and some graduate work towards a master's degree. Experience includes ten years of teaching secretarial courses on the high school and junior college levels and two years of business experience prior to joining this firm two years ago.

Trainees. Trainees are new employees hired to become secretaries upon completion of a company training program. The company's

strict promotion from within policy requires that only secretarial employees for beginning positions be sought from outside the company. Eligibility for employment requires that each prospective trainee be a high school graduate and pass a company shorthand test at 80 words per minute and a typewriting test at a minimum speed of 50 net words per minute.

Trainees are required to attain a minimum typewriting speed of 60 net words per minute in order to be eligible for placement in a permanent secretarial position. Experience with the program has shown that incoming trainees need at least a typewriting speed of 50 net words per minute in order to attain this minimum standard by the end of training. Before the training program was established, a speed of 40 net words per minute was considered satisfactory for executing secretarial functions. However, this speed was found to be inadequate for handling the daily work load and, as a result, was increased to the present 60-net-word-per-minute minimum.

The personnel department tests and interviews applicants. The group leader selects trainees from among those applicants recommended by the personnel department. Trainees usually have just completed high school or one or two years of junior college and have had no previous working experience. They are classified as "clerk stenos" while participating in the program.

In two years, 75 employees have been trained. Ten of these employees were not placed in permanent secretarial positions because of unsatisfactory job performance. These employees typed below 50 net words per minute when selected for the program and were unable to reach the minimum typewriting standard by the end of training.

The number of trainees selected is determined by the rate of secretarial turnover, by the growth of the secretarial force, and by the demand for temporary clerical assistance. The number selected at any one time has been ranging from 1 to 15. At present, the three groups contain a combined total of 20 trainees.

Schedule. The program is given in two phases. The first phase covers a period of four weeks. Trainees attend class from 9 to 10 each morning. After each class, trainees complete typewriting assignments in the services group. Occasionally, a class is canceled to permit trainees to complete special typewriting assignments. At other times, a particular class topic makes it desirable to extend formal instruction beyond the allotted hour.

The second phase of the program ranges in length from two weeks to a year. Trainees are scheduled individually for typewriting assignments or for loan-out assignments.

A program is started whenever more trainees are needed, usually every two or three months. If necessary, a new program can begin as soon as the first phase is completed. Usually trainees complete the program within 6 to 12 weeks. Some require a longer training period; others remain with the group for a year acting as senior trainees and helping to train new employees.

Physical Facilities. A large room has been partitioned into three sections, two small and one large. One of the small sections is the group leader's office. The other is used for class meetings or by trainees for shorthand practice. It is equipped with a tape recorder to enable trainees to practice dictation whenever possible. The

large section is used to complete typewriting activities and is equipped with 15 electric typewriters.

Cost. The major expenses of the services group involve (1) salaries of trainees, the group leader in this plant, and those in two other plants, and (2) costs of secretarial manuals and other training supplies. These expenses are charged to the budget of the administrative services department.

Each trainee receives full salary while training. Salary is based on each trainee's education and experience. Trainees are not permitted to work overtime for other departments within the company and are not eligible for tuition reimbursement until promoted to a permanent position. If these expenses were incurred by trainees, they would be charged to the administrative services department. No provision has been made for them in the department's budget. In addition, the training activity provided by the present program is considered to be sufficient to the extent that it is unnecessary to supplement simultaneously with outside course work.

Objectives. The program is designed to train in new skills, to improve incoming skills, and to instruct in secretarial procedures and policies.

Content, Instructional Methods, and Materials. Program content includes orientation to company policies and procedures, skill training in job duties and procedures, and skill training in special skills and knowledges. Subjects covered are standard filing arrangements; letter, memo, and report format; technical dictation; office machines operation; reproduction processes; knowledge of company

manuals; working under pressure; handling projects with a minimum amount of instruction; and other secretarial practices.

The first phase of the program combines class instruction in secretarial procedures with supervised typewriting activities in the services group. In the second phase, secretarial loan-out assignments are included along with the continuation of typewriting activities. These activities are described below according to content, instructional methods and materials, and evaluation procedures: (A) formal class instruction, (B) supervised typewriting activities, and (C) loan-out assignments.

A. Formal Class Instruction

In the first phase of the program, trainees attend a daily class involving familiarization with the company's secretarial and stenographic reference manual, discussions of secretarial duties and responsibilities, and practice in business and technical dictation.

The company manual is studied by spending part of one or two sessions on each chapter. After the manual has been covered, other secretarial duties and responsibilities are discussed. The manual covers:

1. Set up of the company's letters, envelopes, and carbon copies and the handling of classified information.

2. Preparation of processing of reproducible masters and suggested techniques for obtaining the best copies.

3. Procedures for typewriting rough drafts, finals, proofreader's symbols, the Greek alphabet, and abbreviations.

4. Function and preparation of a few of the most commonly used company forms.

5. Handling company mail, telephone usage, obtaining office supplies, and using reference areas.

6. Document control, the preparation of classified documents, and disposition of the same.

7. Use of various office machines.

8. Punctuation rules and examples.

Dictation practice is given in each session to help trainees learn technical vocabulary and maintain shorthand speeds. Instruction begins with technical vocabulary study. An alphabetic listing of the most commonly used technical words with their corresponding Gregg simplified shorthand outline is contained in the company manual. These words were compiled from lists submitted by many company secretaries. The group leader devised shorthand outlines, according to theory principles, for those words which had none available.

After vocabulary study, practice dictation is given. A survey of the secretarial force showed that an 80-word-per-minute shorthand speed for five minutes was adequate for secretaries. The group leader builds shorthand speed by dictating business letters at 80 words per minute and at higher speeds for two and three minutes and eventually for five minutes. This helps to prepare trainees for a five-minute dictation test at 80 words per minute. This test is given at the end of the first phase of the program and is used to determine each trainee's shorthand skill.

The group leader uses her own materials for dictation. A series of ten dictation lessons ranging in speed from 60 to 120 words per minute has been prepared and placed in a loose-leaf book. Each lesson includes (1) several business letters, (2) several technical letters with shorthand previews, and (3) a short article describing the background of the company. Lessons have been taped to make it possible for trainees (1) to practice on their own before or after class and (2) to practice during class when the instructor cannot be present. Trainees transcribe all dictated material and check their completed work with the group leader's lesson book. Plans are being made to have company executives tape letters for additional dictation practice.

B. Supervised Typewriting Activities

These activities are carried on throughout the program. They consist of typewriting assignments received from other departments and are completed in the services group.

Assignments familiarize trainees with various company formats and special terminology. Training begins with simple typewriting projects and, as competency increases, progresses to more complex ones. Samples of company forms, a company secretarial manual, and a company forms manual are placed on each trainee's desk for reference.

Upon completion of an assignment, each trainee (1) proofreads her own work, (2) asks another trainee to read the work with her, and (3) gives the work to the group leader to

be checked thoroughly. As trainees become more experienced, the group leader needs to only scan their work.

Senior trainees, those who have been with the group for some time, enjoy the responsibility of assisting new trainees with their typewriting assignments. They also invite new trainees to accompany them on errands to other departments. These guided tours provide new trainees with a knowledge of various facilities and their locations.

C. Loan-Out Assignments

Upon completion of the first phase of the program, trainees become eligible for loan-out assignments to other departments for a period of one day to two weeks. They fill in for secretaries who are ill or on vacation; at the same time, they gain actual secretarial experience in different departments.

Whenever an executive needs temporary secretarial help, he fills out a written request and sends it to the group leader. If this request is received at least one day before a secretarial vacancy is to occur, the group leader arranges for the trainee to be briefed by the secretary she is to replace. The secretary also completes a form prepared by the group leader which gives detailed information about the duties and responsibilities of each assignment. The boss's work habits also are specified. The group leader instructs each trainee to bring her secretarial manuals, forms manuals, and telephone answering blanks to

all assignments. Trainees may contact the group leader at any time to discuss any problems that they are encountering in carrying out their assignments.

Job assignments are classified by management level of the executive involved. Senior secretarial assignments involve executives with titles of managers or higher; junior assignments involve executives below this title. Senior assignments are given to senior trainees, those with group longevity and top secretarial ratings. Junior assignments are given to new trainees.

Reward. Trainees are eligible for promotion to permanent secretarial positions when they have achieved certain standards of performance. Executives notify the group leader when secretarial vacancies occur. The group leader in turn provides them with a list of eligible trainees from which to select prospective candidates for interviews. All trainees in the past have been interviewed for two or more positions and have been permitted to accept or reject any position offered them.

Evaluation. The group leader evaluates each trainee during the program as follows: Shorthand skills are determined objectively during class instruction. Work performance is assessed (1) subjectively by working closely with each trainee during supervised typewriting activities and (2) objectively by examining reports which evaluate each trainee's performance on loan-out assignments. These reports are completed by each executive that a trainee serves. As soon as the group leader receives a report, she discusses it with

the trainee concerned and redirects her training activities accordingly. The report is set up as follows:

	Exceptional	Above Average	Average	Unsatisfactory
Quality of Work				
Quantity of Work				
Initiative				
Cooperation				
Appearance				
Other Comments:				

In addition, in November and in April of each year, written performance rating forms are completed for all nonsupervisory employees throughout the company. Trainees currently in the services group are included and are rated by the group leader. These evaluations are used primarily to determine salary raises for employees who have been with the firm a minimum of four months.

Follow-up. After a trainee has been placed in a permanent position, she often returns to chat informally with the group leader. This informal communicative process helps the group leader to assist the former trainee with any occupational adjustments and to become aware of secretarial training that should be incorporated into the present program.

Establishment of Additional Services Groups. At first, the secretarial training and services group also handled typewriting assignments for two smaller plants in the area. The increasing amount of work received from these plants indicated the desirability of establishing a services group in each of these plants. The group

leader provided management with evidence to justify this need. Routine monthly administrative reports and a summary report showing the amount of work completed each month for each plant were submitted. These analyses were instrumental in gaining management's approval for the establishment of a secretarial services group in each of these plants for the purpose of handling typewriting and loan-out assignments.

The two new groups now have been in operation about a month. One group consists of a leader and a trainee; the other, a leader and three trainees. The group leader of the secretarial training and services group oversees their activities, provides them with any needed guidance, and selects their leaders and trainees. The new group leaders were selected from among senior trainees of the secretarial training and services group. They were given three weeks of individual training by the group leader. Training was designed to prepare them to carry out their job duties and responsibilities as leaders. Trainees assigned to these two groups were selected from applicants living in the vicinity of each plant. They participated in the first phase of the training program before starting work at their assigned plants.

Administrative Reports. The group leader prepares four monthly reports for the vice president of administration. These reports serve as a record of current activity and help to indicate current and future needs. The four reports are:

1. Number of Incoming and Outgoing Trainees in Each Services Group

2. Summary of Work Activity in Each Services Group

   The type of work activity completed for other departments is summarized. Data are taken from "Secretarial Services Work Request" slips which provide instructions for each assignment. The total number of pages for each category plus extension totals is reported for the following:

   a. Types of work completed by total number of original pages typed: letter, interoffice memo, technical reports, rough drafts, and other.

   b. Kinds of stock used by pages typed: bond, ditto, velium, colitho, and other.

3. Senior and Junior Assignments in Each Services Group

   Loan-out assignments are grouped according to senior or junior level of requestor. Name and title of each person requesting assistance with total number of days worked are listed along with grand total of days worked for all requestors.

4. Special Projects

   Projects completed by the group leader are described. Examples of projects are those completed at the request of management, discussions of various office problems with small groups of clerical employees, and training leaders for other plants.

Future Programs. The length of program is affected by the rate of secretarial turnover and the need to expand or reduce the number of these employees. The future outlook appears to suggest that more secretaries will need to be trained at a faster rate. When this situation occurs, the program will be restricted to a six-week period. The first phase of the program, the first four-week period of class instruction and supervised typewriting activity, will remain unchanged. The second phase will be limited to the fifth and sixth weeks and will be devoted exclusively to loan-out assignments.

II. Future Plans

The group leader believes that company training that is tailored to the specific needs of its clerical employees is more valuable to employees and to the company than participation in out-of-company training activities. In-company training is also considered by the group leader to be less costly to the company than tuition reimbursement. As a result, the group leader is planning to develop a course for permanent secretarial employees designed to improve their job performance. The course will include skill training in secretarial job duties and procedures as well as in those special skills and knowledges needed to carry out job activities. Employees will attend either at the request of their supervisors or on a volunteer basis. Training will be held after working hours.

Out-of-Company Training

Permanently assigned clerical employees are eligible to take courses that are related to their present jobs at accredited institutions. The company pays all tuition and book costs upon satisfactory completion of each course.

Case K

Vestibule Training Combined with Temporary Job Assignments for New Typists, Dictaphone Transcribers, and Stenographers

This bank conducts vestibule training for its over 1,000 clerical employees. New employees are provided with a clerical orientation program which combines class instruction with job experience before permanent placement. Permanent employees are offered telephone and typewriting improvement courses. All other employee training is carried out on-the-job by supervisors or by predecessors when feasible. Tuition aid for out-of-company training is also provided.

In-Company Training

Purpose. Formal training is given to prepare new clerical employees for work in the company and to increase skill and knowledge of certain permanent clerical employees for better job performance.

Development. Management was dissatisfied with the work being produced by typists and stenographers. Study by the personnel department showed that new clerical employees attended an hour orientation session before reporting to their permanent positions. These employees learned their job duties on the job from supervisors or from predecessors when possible.

The personnel department found that the secretarial services department was producing particularly poor quality work at low production rates. This department was furnishing other departments

with typewriting and transcription services and relief fill-ins. New employees to this department began learning their duties by typewriting assignments which needed to be retyped. Within a week they were performing machine transcription assignments and acting as relief fill-ins.

Analysis of the situation by the personnel department revealed that these employees were deficient in skills necessary for satisfactory performance. A gap seemed to exist between training received in school and training required for beginning employment. New and permanent clerical employees needed to improve their work performance.

These findings were instrumental in eliminating the relief fill-in function from the secretarial services department. In 1960, this function was integrated with the establishment of a vestibule school for clerical employees.

Responsibility. Vestibule training for clerical workers was developed by the staff of the training department. Its continued development and operation are the full-time responsibility of a training assistant. In the training program for new clerical employees, a representative from the Dictaphone Corporation demonstrates machine operation.

The training assistant's major job function is providing formal training activities for clerical employees. Minor duties involve (1) conducting company tours for foreign visitors and college groups, (2) giving recruiting talks to high schools and junior college

students, and (3) assisting the personnel department with placement of trainees.

The training assistant studied to be a secretary in Ireland and worked about eight years as a secretary in Ireland and in England. Employment with the bank began with a six-month stint in the secretarial services department, followed by six months as secretary in the training department. Half of each day during the last two of these months was spent assisting with the operation of clerical training activities. At the end of this period, the training assistant was assigned full responsibility for them. Since joining the bank, her educational background has been enhanced by completing courses at the American Institute of Banking and by attending a two-day secretarial workshop sponsored by the Katharine Gibbs School.

Physical Facilities. A training room is equipped permanently with five student desks, each with an electric typewriter and a dictaphone, plus an instructor's desk. Additional equipment is brought in from the training department and secretarial services department as needed. A maximum of 24 students can be handled at one time. If necessary, the room can be doubled in size by opening connecting doors to an adjoining classroom. Visual aids equipment is provided by the training department.

Cost. Clerical training costs are part of the over-all training department's budget. Training costs include training assistant's salary, new employees' salaries until permanently assigned, and instructional materials. New employees while training receive starting salaries based upon education and experience.

Programs. The following formal activities are described below: (1) clerical orientation program, (2) correct typing skills, and (3) telephone training.

I. Clerical Orientation Program

This program is given to new employees in two phases. The first phase consists of two weeks of class instruction and practice. From the middle of May to about the end of July, vestibule training is conducted for entering groups of new employees. During the rest of the year, from September through April, instruction is conducted on an individual basis. The second phase of the program is production work and varies in length from 3 to 12 months.

Trainees. Trainees are high school or business school graduates with secretarial training and with little work experience. They are classified as typists, dictaphone transcribers, and stenographers, depending upon their secretarial background.

The personnel department selects clerical office employees and sends them to the training assistant for clerical orientation. Trainees are selected on the basis of school performance, references, and employment tests. Of the 54 trainees in the 1962 group programs, 28 were business school or junior college graduates; and 26 were high school graduates. Of the 44 trainees in the 1963 program, 31 were business school or junior college graduates; and 13 were high school graduates. Of those trainees with education beyond high school, the majority were business school graduates.

The total number of trainees selected for the group program depends upon projected needs of the company and available number of

acceptable applicants. About 50 new employees are selected for group programs each year. Group training is staggered. A maximum of 20 trainees can participate in the first phase of the program at one time. Five to eight employees usually start training the first week that the program is offered. Ten employees begin training the second week. The third and each succeeding week those employees who have completed the first phase are replaced with new trainees.

During the rest of the year, two to four clerical employees are hired each week, depending upon the company's needs. These employees follow a similar program but are trained on an individual basis.

Schedule. The first phase of the program is two weeks in length. Group instruction begins about the middle of May and ends about the middle of July. During the rest of the year, instruction is given on an individual basis.

During the period of group instruction, a new class begins training each Monday. Four sessions are scheduled each day. Two of these sessions are hour length ones devoted to skills. During one of these sessions, trainees concentrate on typewriting practice; and during the other session, on dictaphone skills, shorthand skills, or more typewriting practice, depending upon their job classifications.

The other two daily sessions are each two and a half hours in length. During this time, trainees prepare correspondence kits and attend special sessions. Special sessions are scheduled when trainees need to complete the program or when a change in training pace is desired. Each special session is offered at least once every two weeks to insure that trainees attend the complete group of special

sessions during the first phase of their training experience. If trainees complete correspondence kits and special sessions before the end of two weeks, they are assigned production work to complete during these sessions.

Activities for the first phase of the program are scheduled daily as follows:

Time	Subject
9:00 - 10:00 a.m.	PDL Typing Practice Dictaphone Skills Shorthand Skills Spelling
10:00 - 12:30 p.m.	Bank Orientation Correspondence Kits Special Sessions Production Work
12:30 - 1:30	Lunch
1:30 - 2:30	PDL Typing Practice Dictaphone Skills Shorthand Skills Spelling
2:30 - 5:00	Correspondence Kits Special Sessions Production Work

In the second phase of the program, trainees spend from three months to a year acting as temporary clerical workers whenever needed in the bank. Temporary assignments vary in length from half a day to several weeks.

Objectives. The main objectives are:

1. To help each new employee attain better skills with which to perform job duties.

2. To give each new employee an over-all view of the bank's operations and procedures.

3. To train each new employee in clerical operations and procedures that are peculiar to the bank.

4. To give each new employee work experience in a variety of clerical jobs throughout the bank before permanently assigned.

5. To give each new employee and the bank an opportunity to determine the permanent assignment that is best suited to the employee.

6. To provide other departments in the bank with employees for relief fill-ins.

Program Content and Implementation. Program content is concerned with orientation to company policies and procedures, with skill training in job duties and procedures, and with skill training in special skills and knowledges. Each activity included in this program is described, when applicable, according to particular trainees involved, schedule, objectives, content, instructional methods, instructional materials, and evaluation procedures. Activities include: (A) dictaphone skills, (B) PDL typing practice, (C) shorthand skills, (D) spelling session, (E) correspondence kits, (F) special sessions, and (G) production work.

A. Dictaphone Skills

Trainees. Each trainee classified as a transcriber must pass a transcription test to qualify for dictaphone training. This test is scheduled as one of the special sessions in the program.

Schedule. The activity is held for an hour each day both in the morning and in the afternoon during the first phase of the program. Trainees attend one of these sessions each day.

Objectives. The activity is designed to improve transcribing skills and to train in transcribing procedures common to the bank.

Content and Instructional Methods and Materials. Trainees first are given a briefing on machine operation. They next transcribe in mailable form four to eight dictabelts which contain letters of general business content. The number of dictabelts transcribed is dependent upon each trainee's transcription ability. These dictabelts were selected from the dictaphone course published by the Dictaphone Corporation.

As soon as this work is satisfactory, dictabelts used by other departments in the bank are transcribed. All departments are asked to send their used dictabelts with carbon copies of contents for use in training new employees. Carbon copies serve as an instructor's key for the training assistant.

These dictabelts consist of short, medium, and long letters. The signature and account number of each letter determines types of stationery and envelopes to be used. At the top of each completed transcript the trainee types the specific stationery supplies that would be used. When trainees are in doubt about any phase of transcription, they are instructed to refer to correspondence kits and other available references before asking anyone for assistance.

Evaluation. During training, transcribed letters are checked by the training assistant to determine mailability and areas that need more study. If the training assistant is too busy to check letters, the trainee uses the key to check her own work. Unmailable letters are not retyped. The training assistant believes that time can be spent more advantageously by working with dictabelts not previously transcribed.

An evaluation of each trainee's performance is added to her training profile. Changes in dictaphone skills are recorded on each trainee's one-page training record. The number of errors and speed on dictabelts transcribed on the first day of training are compared with those transcribed on the last day. Also included in the profile is a chart containing the number of letters transcribed daily.

B. PDL Typing

Trainees. All trainees attend this activity.

Schedule. The activity is held daily for an hour in the morning and in the afternoon during the first phase of the program. Trainees attend one of these sessions each day.

Objectives. The activity is designed to improve typewriting skills.

Content. Trainees practice typewriting drills and timings geared to improve speed and accuracy. One of the 24 films from the "Typewriting Skill Improvement Plan" published by

Perceptual Development Labs., St. Louis, Missouri, is used in each session.

Evaluation. Trainees note their progress in typewriting by recording their speed and accuracy on charts set up for sentence, paragraph, and five-minute timed writing performances. On the chart designed for recording five-minute timed writings, each writing is recorded according to date, gross speed, and number of errors.

The training assistant measures each trainee's changes in typewriting performance by comparing a five-minute timed writing pretest with a similar posttest. This analysis, which consists of pretest speed, posttest speed, difference in speed, and percentage of word-per-minute increase or decrease, is added to each trainee's training profile. This information is also presented in an annual summary report for interested management personnel. This report shows the changes in typewriting performance for each trainee in the May to July group program as well as the average change in speed and error performance of the entire group.

In the 1962 group program containing 54 trainees, the average per cent of speed increase was 35 per cent; in the 1963 group program containing 44 trainees, it was 24 per cent. In both programs, the average number of words increased per minute was about 20. The average error reduction was between eight to ten words on a five-minute timed writing.

C. Shorthand Skills

Trainees. Trainees classified as stenographers must pass a transcription test to be eligible for shorthand skill training. This test is scheduled as one of the special sessions.

Schedule. The activity is held daily for an hour both in the morning and in the afternoon during the first phase of the program. Trainees attend one of these sessions each day.

Objectives. The activity is designed to improve shorthand and transcription skills and to provide a knowledge of bank terminology.

Content and Instructional Methods and Materials. The first two sessions concentrate on bank terminology. First, trainees study banking terms contained in a booklet that has been prepared by the bank. Each trainee receives a copy of this booklet for use as a reference in transcription work. Next, trainees transcribe letters dealing with the subject of banking. Letters are transcribed in mailable form from slides shown by an overhead projector. These slides contain letters written in shorthand. These letters have been copied from the banking section of a shorthand textbook.

Upon completion of the second session, training becomes self-paced. Trainees usually spend the next two or three sessions practicing with commercially prepared

dictation records. These records contain general business letters and range in speed from 80 to 120 words per minute. All practice material is transcribed in mailable form. The training assistant checks each transcript for mailability and scans shorthand notes to assess knowledge of shorthand theory.

Trainees spend the remaining sessions of the first phase of the program taking dictation in shorthand from material contained on dictabelts. Shorthand notes are then transcribed into mailable form. Trainees indicate their transcription time on each letter. They check their transcripts by replaying bank dictabelts. The training assistant then checks transcripts with the carbon-copy key provided by the original dictators.

Evaluation. The training assistant evaluates each trainee's performance by observation of work habits and by examination of shorthand notes and transcribed work. A report of the trainee's skill attained at the completion of training is added to the trainee's training record.

D. Correspondence Kits

Trainees. All trainees attend this activity.

Schedule. Correspondence kits are prepared during the two-and-one-half-hour session held both in the morning and in the afternoon, unless a special session has been scheduled, during the first phase of the program.

Objectives. Trainees prepare correspondence kits in order to learn company correspondence procedures and to provide themselves with an on-the-job reference manual.

Content and Instructional Materials and Methods. Each trainee types two kits: one kit contains the bank's forms; the other, the forms of its subsidiary. When the trainee is placed in a permanent position, with either the bank or the subsidiary, the kit that will not be used is returned to the training assistant.

Kits were prepared by the manager of the secretarial services department. They are revised by the training assistant when necessary. Each kit consists of an open folder with inside pockets containing examples of frequently used correspondence forms: letters, envelopes, memos, comment sheets, and labels. The contents of each letter and memo describe correspondence procedures preferred by the bank or its subsidiary and how to order various stationery supplies.

Each correspondence form has been placed on a slide for use with an overhead projector. Trainees type kit material from these slides. A maximum of 20 trainees can work on kits at one time.

Evaluation. The training assistant grades kits when completed and tests trainees on their contents. Both grades are added to each trainee's training record along with the dates the kit was started and completed.

E. Spelling Session

Trainees. All trainees attend the activity.

Schedule. Five- to ten-minute spelling sessions are interjected frequently during the first hour session held both in the morning and in the afternoon during the first phase of the program.

Objectives. The activity is designed to improve spelling skill and to serve as a device for changing training pace.

Content and Implementation. Unannounced oral and written tests are given. Spelling words are taken from two secretarial manuals and from a dictionary of frequently used words in business. Each trainee is provided with a copy of these materials. Misspelled words are included in succeeding tests.

F. Special Sessions

The group of special sessions includes bank orientation; grooming, business ethics, and etiquette; transcription test; dictaphone operation and techniques; typewriting proficiency; use of source materials; and telephone training. These sessions are conducted when needed. They are held some time during the two-and-one-half-hour period that is scheduled both in the morning and in the afternoon of the first phase of the program.

Bank Orientation. The first 45 minutes of this session involves a flannel board presentation of banking

operations and reading a booklet which describes the individual and his community bank. Next, trainees tour the bank. As each department is visited, its functions are explained briefly and areas where trainees may work are pointed out.

Grooming, Business Ethics, and Etiquette. The importance of grooming, business ethics, and etiquette as an employee of the bank is discussed. Each trainee receives a copy of a secretary's guide to beauty and charm.

Transcription Test. Trainees must pass a transcription test with a grade of 70 per cent or better to qualify for dictaphone skills or shorthand skills training and for preparation of correspondence kits. A standard test covering grammar, spelling, and ability to typewrite letters is used.

Dictaphone Operation and Techniques. The dictation and the transcription units of the Dictaphone machine are described by a representative from the Dictaphone Corporation. Techniques for efficient use are stressed. Each trainee is given an opportunity to try the dictating unit to determine how easy or difficult it is.

Typing Proficiency. Efficient typewriting practices and shortcuts are demonstrated and discussed by a representative from International Business Machines Corporation.

Use of Source Material. Explanation is given concerning how to use dictionaries, international directories, rotary desk files, secretarial handbooks, and telephone directories.

Telephone Training. In a one-hour session, telephone techniques are discussed with the aid of a flannel board and pictures. Main points covered are: importance of proper handling, means of proper handling, geography of telephone books, answer promptly, identify yourself, be particular with telephone phrases, avoid "hold the line," answer associate's telephone, keep a pad and pencil handy, transferring calls, and personal calls.

As soon after this session as possible, the training assistant holds a 15-minute conference with each trainee. During this time, the training assistant holds practice telephone conversations with the trainee to assess her skill in various telephone situations. Recordings of the conversations are played back and discussed with the trainees. If necessary, a second conference is scheduled.

G. Production Work

Schedule. The second phase of the program usually begins when a trainee completes two weeks of class training. Some trainees begin this phase after the first week of training on a part- or full-day basis depending upon whether or not some or all class goals are completed.

Objectives. Production work is designed to give each trainee experience in actual clerical assignments, to help in determining the permanent assignment best suited to the trainee, and to provide departments throughout the bank with a supply of relief fill-ins.

Content. Production work primarily consists of working as a floater assigned to any area in the bank needing clerical assistance. Floaters are helped with their temporary duties by correspondence kits prepared in the first phase of the program and by supervisors in assigned areas. Other production work includes working in the training room on job assignments for other departments, transcribing dictaphone belts for other departments, typewriting training records and reports, and helping the training assistant with operating teaching aids and distributing materials to trainees.

Trainees are placed in permanent positions as job openings occur that fit their clerical abilities. The average length of time that a trainee spends as a floater is from three to six months but can extend to a year. Frequently, top-notch trainees are the last to be placed in permanent positions. These trainees usually are able to cope more easily with job change. At least three of these trainees are kept as a nucleus to serve top management. For example, of 44 trainees in the 1963 group program, eight had not been placed by April 1964.

Evaluation. A training profile is maintained both for employees trained in the group program and for those trained individually. A one-page record kept during training serves as a training check list and as a summary report of each trainee's skills improvement and assessment. The report includes the following information:

Pre-Employment Activities: brief description given

Training Period: date started and date finished

Permanent Assignments: date started and date finished

Training Activities:
- Typing: pretest and posttest records and per cent of speed improvement
- Dictaphone: pretest and posttest records
- Correspondence Kits: date started and date finished
- Shorthand: skill attained at completion of training
- Special Sessions: date attended for each one
- Production Work: date started, date completed, and department and duties of each assignment

A progress report is added to this record after the first six weeks of training. Other class records, which previously have been mentioned when describing each training activity, also are added to the trainee's profile.

About a month after all class instruction has been completed for each year's group of trainees, a report of the group's status is compiled for the head of the training department. This report gives the total number of floaters in the group program, number transferred to permanent positions, and number resigned. The possibility of not reporting the group status until a later date is being weighed. The present report may be compiled too soon after training, whereas a later report would tend to show a greater proportion of trainees placed in permanent positions.

Program Changes. Instructional changes are being made in the group program that is to begin in May 1964. These changes, based upon the training assistant's experience with the 1963 program, are as follows:

1. The first phase of the program will be extended from two to three weeks. More time is needed to overcome inadequacies of new employees.

2. The maximum number of trainees permitted for group instruction will be changed from 20 to 15 trainees. This change will make instruction easier and provide more opportunity to meet individual needs.

3. Corresponding kits will be copied from model kits provided by the training assistant rather than from slides shown by an overhead projector. The projector cannot be adjusted for varying amounts of time needed by class members to complete each item.

Program Addition. A session on the ten-key adding machine is to be added to the group of special sessions. New employees will be given a briefing on operating a machine and an opportunity to try out one.

II. Correct Typing Skills

Purpose. The course is given to help permanent clerical employees perform their typewriting duties more efficiently.

Trainees. Employees with typewriting duties are eligible to enroll. A memo is sent to department heads announcing when the course is to begin. Department heads are requested to submit names of employees who they have selected to attend. Classes range in size from 12 to 25 members.

Schedule. The course is offered two times a year between September and May. It consists of a one-hour session held three

times a week, Tuesday, Thursday, and Friday, from 9 to 10 a.m. The course is set up for 24 sessions in an eight-week period. The actual number of sessions conducted is dependent upon the needs of the group. Usually 15 to 20 sessions are held.

Objectives. The course is designed to help correct each employee's typewriting deficiencies.

Content. Program content is concerned with skill training in typewriting. A five-minute timed writing is given as a pretest to determine deficiencies in typewriting speed and accuracy. Class drills and timings are geared to overcome those deficiencies shown on the test.

Instructional Methods and Materials. The course is conducted similarly to PDL typing held for new employees. One of the 24 films from the "Typewriting Skill Improvement Plan" is used in each session.

Evaluation. Upon completion of the course, another five-minute timed writing is given as a posttest to evaluate the effect of training. Gross speed and errors of the pretest are compared with those of the posttest to determine performance changes. A record of each employee's performance is kept by the training assistant. An identical report is sent to each one's department head.

A comment made by the training assistant in a report about a typing skills course conducted from January to March 1964 gives an indication of the effect of this training:

> In two cases the increase in both speed and reduction of errors was very outstanding. In most cases the greatest per cent of improvement was shown in the reduction of errors and not in the increased speed. One girl went in reverse and did less well at the end of the course than when she began.

III. Telephone Training

Purpose. The course is given to improve permanent clerical employees' telephone usage.

Responsibility. The New England Telephone and Telegraph Company originally conducted the telephone session for the bank. The session now is conducted by the training assistant.

Trainees. Permanent clerical employees recommended by their department heads are eligible to attend.

Schedule. Courses are scheduled as needed between September and May. Usually a course is held once or twice each month. The course consists of a one-hour group session followed by a 15-minute individual conference.

Objectives. The course provides knowledge of correct telephone techniques and helps each employee apply these techniques to her own performance.

Content and Instructional Methods and Materials. Course content is concerned with skill training in telephone techniques. This program is similar to the telephone training session conducted for new clerical employees.

Evaluation. The training assistant keeps a report of each employee's performance and sends an identical report to each employee's department head.

Out-of-Company Training

Upon employment with the bank, employees are eligible to enroll in any course offered by the American Institute of Banking. Full tuition cost is paid for any course satisfactorily completed at the Institute.

Case L

Skill Training Courses for Job Improvement

and for Job Advancement

This insurance company employing over 500 clerical employees follows a strict promotion from within policy. New clerical employees join the work force as general clerical trainees. Job orientation is provided by combining supervised on-the-job training and study of office procedural manuals within the framework of a rotation plan.

Promoted employees learn new duties through training conducted on the job by their supervisors. Secretarial development courses and courses in office personnel, effective speaking, and speeded reading are offered regular employees to help them function more efficiently in present or future positions. No tuition aid for out-of-company courses is provided. Employees take basic skill courses for job advancement at their own expense. This practice helps in providing the company with evidence of an employee's initiative and effort.

In-Company Training

Purpose. Formal training is given to prepare new clerical employees for work in the company and to increase knowledge and skill of all permanent clerical employees for better job performance and for job advancement. The following activities are described below: (1) new employee orientation and (2) company courses.

I. New Employee Orientation

Development. For a number of years, this company experienced a high clerical turnover rate. In 1957, the office, methods, and training director attempted to minimize the outflow of clerical employees by establishing a strict promotion from within policy and a salary merit plan. These policies have resulted in employees with one or more years of company longevity finding difficulty in locating comparable paying and ranking positions with other companies. In turn, office turnover rate has become substantially lower than rates of other companies with similar operations within the Boston area.

Integral factors contributing to the successful functioning of these personnel policies involve carefully selecting and training new employees. As a consequence, a comprehensive testing program and a three-month job rotation program have been developed.

Responsibility. Development and administration of employee testing and orientation are the responsibilities of the office, methods, and training director. Trainees execute their job assignments under the guidance of selected office supervisors. Supervisors prepare for these responsibilities by attending supervisory courses provided by the company. They complete such courses as a 12-hour course in basic techniques of supervision, a 6-hour course in supervising female personnel, a 9-hour course on the supervisor and cost control, and a 9-hour course in handling complaints.

Trainees. Applicants for clerical employment are high school graduates with little or no previous experience. They qualify for employment with the company by meeting company norms established

for a series of tests covering general aptitudes, English, numerical ability, and typewriting skill. Fifty to sixty applicants are hired each June. These applicants are classified as general clerical trainees until assigned permanent positions as typists.

Objectives. New employee training is designed:

1. To give the trainee an over-all view of the company's internal flow of operations with which to relate and to interpret her own job functions.

2. To orient the trainee to specific job duties under organized supervision.

3. To provide the trainee with various job experiences in order to develop greater employee flexibility and versatility.

4. To evaluate the trainee's present performance and future potential for determination of permanent employment and future advancement within the company.

Content and Implementation. Program content includes orientation to company policies and procedures and skill training in job duties and procedures. The program is presented by a job rotation plan that lasts for three months.

Trainees are assigned to a series of positions throughout the company during this period. They perform each assignment under the guidance of a supervisor. Each job assignment lasts about three weeks. Assignments begin with simple job duties and proceed to more complex ones in an attempt to facilitate the learning process.

Trainees are also given two office manuals to aid them in their assignments. One manual contains instructions for typewriting different kinds of reports and transcription pointers, ways to improve typewriting skill, and a glossary of technical terms. The

other provides information about office functions and their implementation.

Reward. A diploma is awarded to each trainee who satisfactorily completes the rotation program. The company arranges for trainees to receive their diplomas at a "Student Seminar Graduation Day." The occasion is also reported in the local newspapers. Graduation-day activities are outlined below.

8:40 a.m.	Welcome by assistant general manager Speech on Department A's Functions by its director Speech on Department B's Functions by its director
9:50	Mid-morning coffee break Film on Company Product Speech on Research Facilities by its director Film on Company Product Demonstration of Company Product
11:50	Lunch Speech on General Office Review by office, methods, and training director Speech on Department C's Functions by its director You and Your Future by assistant general director Presentation of Diploma by office, methods, and training director

This diploma represents an educational achievement and company recognition both to trainees and to their families. Each trainee also receives a kit which contains brochures describing various aspects of company activities. These brochures help each trainee's family become more knowledgeable about the company with which their daughter is associated.

Evaluation. Supervisors evaluate each trainee assigned to them by keeping a daily production chart of completed work and by filling out an appraisal form shortly before the trainee is reassigned. This form describes a trainee's performance and her potential for future

advancement. This information is helpful to the office, methods, and training director when guiding and recommending trainees for permanent positions. The supervisor either completes the appraisal form in the presence of the trainee or discusses the completed form with the trainee. This procedure helps to improve communication relations between supervisor and trainee and to make the trainee more cognizant of her strong and weak points.

The appraisal form has been especially constructed to help provide a comprehensive evaluation of the trainee and to facilitate discussion between supervisor and trainee. The form is outlined below.

1. Judgment of Traits

   Each of the following traits are rated by checking first and second choices of listed proficiency descriptions: knowledge of job, job performance, leadership and supervisory ability, stability, judgment, and dependability. Each trait and proficiency rating are defined. Words or phrases may be crossed out or modified to better describe the degree of proficiency.

2. Summary of the Appraisal

   a. Any outstanding abilities demonstrated are described.

   b. Any administrative shortcomings to hinder effectiveness are described.

   c. Any personal weaknesses are described.

   d. Over-all performance is rated by checking one of the following: excellent, good, satisfactory, below average, or poor.

   e. Specific recommendations for improvement are given.

3. Assessment of Potential

   Employee's effectiveness in present job is rated according to: superior, above average, average, or little. Each rating is defined.

4. Before Discussion with the Employee

   a. Examples are listed in which employee demonstrates a high degree of proficiency.

   b. Examples are listed in which employee has not functioned as well as could be expected.

   c. Immediate steps toward improving job performance are given.

5. Summary of Discussion with Employee

6. Signature of Employee, Date
   Signature of Supervisor, Title, Date

II. Company Courses

Purpose. These courses are designed to improve job performance and, in most instances, to prepare for job advancement.

Development. Management also recognized a responsibility to employees for their educational progress and sought the assistance of the Bureau of Business and Industrial Training at Northeastern University in implementing this responsibility. Study of employees' educational needs resulted in the establishment of an educational program in 1957 designed to help employees improve themselves and possibly to increase their earning capacity. The purpose of the program, as described in a written statement to employees, is:

> Business is a day-to-day challenging situation and we must use every means to meet it. Education at work is the best solution. Education at work will give an enlightened work group. Without an enlightened work group we cannot have understanding. Without understanding we cannot have intelligent judgment. Without intelligent judgment an organization cannot survive.

Responsibility. The company's training director aided by other management personnel and the Bureau's staff have developed courses for clerical personnel. Faculty members assigned by the Bureau conduct these courses under the guidance and supervision of the company's training director.

Trainees. Department heads inform permanent employees when courses are to be offered. Some courses are designed for only secretaries and senior typists who will soon be promoted to secretarial positions; other courses, for all clerical employees. Employees submit registration forms to their department heads for approval of course enrollment. Approved forms are sent to the training director for final confirmation. Class size usually ranges from 16 to 25 employees.

Schedule. The training director determines when courses are needed by employees and, consequently, when they should be offered. Each course is usually given once a year.

Courses are conducted during regular working hours. One day a week is set aside for this activity. Of the three or four courses conducted on this day, only one is geared for nonsupervisory personnel. Each course meets once a week for one and one-half hours. For example, a course may meet in the morning from 9:00 to 10:30 or from 11:00 to 12:30 or in the afternoon from 1:00 to 2:30. The number of planned sessions for each course is determined by its subject.

Physical Facilities. Classes are held in one of the company's several classrooms.

Cost. The company pays Northeastern University for their services. No fees are charged participating employees.

Courses. Courses designed for clerical personnel are classified under (A) the secretarial development program and (B) elective courses. They are described below according to trainees, number of sessions, objectives, and content.

A. Secretarial Development Program

Courses included in this classification are: basic telephone techniques, business English, modern business letter writing, and secretarial development. These courses are concerned with skill training in certain skills and knowledges that are needed in performing secretarial job duties. Courses are given to improve job performance and to prepare for job advancement.

Enrollees include secretarial and senior typists. Other clerical personnel are permitted to enroll in basic telephone techniques, if their duties involve the use of the telephone, and in techniques of good business manners.

Basic Telephone Techniques. This course (1) trains in proper telephone techniques and (2) discusses their importance for the employee as well as for the company. Three sessions are needed to cover the following topics: quality of good voice and articulation, quality of good telephone speech, rate and pitch of speech, pleasing emotional quality, telephone courtesy, telephone fact analyses, and use of telephone equipment.

Business English. This course is given (1) to help in the manipulation of sentences and the use of effective business English and (2) to help participants straighten out his or her ideas and present them effectively in everyday situations. Topics covered in six sessions include: spelling rules, strategy; capitals; end marks, semicolon, colon, dash; accurate forms; the exact word; simplicity and sincerity; conciseness; vocabulary building; case of pronouns; sentence integrity; sentence strength; and purposeful sentences.

Modern Business Letter Writing. This course gives the basic fundamental principles of effective business letter writing. In six sessions, the following topics are covered: stationery size, color, and quality; letterhead; effective presentation of letter; heading; inside address; salutation; body of the letter; complimentary close; signature; identification line; proper folding and insertion; abbreviations; correct punctuation; and dictation techniques.

Secretarial Development. This course helps the secretary (1) to develop a broader grasp of her responsibilities and her relation with other employees and an understanding of good public relations and (2) to learn how to become a more important and trusted individual. Topics presented in six sessions are: what the secretary's responsibility is; how to build a better personal relationship; the secretary as an "ambassador of good will"; how to be the "executive"

when the boss is away; the secretary as the boss's partner; the secretary's relation to other employees; how to handle visitors; giving information; effective telephone techniques; how an effective letter is composed; how to avoid the "sad" letter; points on dictation; suggestions for typewriting; requirements of a good secretary; and the well-groomed secretary.

Techniques of Good Business Manners. In this course participants learn (1) that kindness and thoroughness are characteristics used by superiors and associates in judging employees, (2) that human consideration is playing an important part in business relations, and (3) that integrity, personal honesty, and honesty of mind reflect in the entire organization. In six sessions, the following topics are discussed and demonstrated: personal appearance, introductions, table manners, attitude toward women, tact and diplomacy, constructive criticism, co-operation, interest, recognizing a superior, punctuality, announcing callers, and personal dignity.

B. Elective Courses

Courses open to any interested clerical employee are office personnel, basic fundamentals of effective speaking, and speeded reading. The first course is concerned with skill training in special skills and knowledges for better job performance and for job advancement. The remaining

two courses are concerned with providing general education for better job performance.

Office Personnel. This course is designed to give office personnel an awareness of the types of action which will tend to help as well as hinder their speed of advancement. The following topics are presented in two sessions: yardsticks to progress; dependability; thoroughness; your boss; promptness, a form of courtesy; missed opportunity; reactions with fellow workers; good work habits; "did I say that?"; be frank about errors; use of the telephone; and how do you rate yourself.

Basic Fundamentals of Effective Speaking. This course is designed to help employees speak convincingly, to overcome self-consciousness, and to develop self-confidence. Participants are given practical rather than theoretical training in the selection and organization of speech materials, in the delivery of the speech, and in other important essentials of effective speaking. Work is centered around participants' interests and is adapted specifically to meet everyday work situations. Topics included in six sessions are: the nature of effective speech, the purpose of effective speech, vocabulary, conversation and basic speech skills, voice, drift--humor, method of preparation, techniques of presentation, persuasion, and "stand up" and speak.

Speeded Reading. This course is designed to give specific aid in reading with speed and comprehension. The tempo of today's business has placed more and more emphasis on the skill of reading. Topics covered in eight sessions include: introduction to more efficient reading, comprehension, vocabulary extension, skipping and skimming, eye span, key-word reading, reading speed, skimming for fact, phrase recognition, concentration, note-taking exercises in business reading, summarizing, and outlining.

Instructional Methods. Lecture, discussion, demonstrations, and practice are used. Their use depends upon the subject being presented.

Instructional Materials. Instructional materials provided by the Bureau's staff are used. These materials have been prepared especially for each course by the staff.

Reward. Upon satisfactory completion of each course, a certificate signed by the director of the Bureau and by the general manager of the company is issued.

Evaluation. Upon completion of a course, the instructor completes an appraisal of each trainee's course performance. This report is placed in the trainee's personal folder. Factors that are considered in the appraisal are attitude, attendance, and quality and amount of class participation.

Case M

Stenographic Pool Training for Secretarial Graduates; Skill Training and General Education Courses for Permanent Employees

This utility firm provides its 400 clerical employees with in-company and out-of-company training. Formal in-company training includes orientation and induction training and stenographic pool training for new clerical employees; and skill and general education courses for permanent clerical employees. On-the-job training is supervised by division managers and immediate supervisors. Financial assistance is provided for out-of-company courses.

In-Company Training

Purpose. Formal training is given to prepare new secretarial employees for work in the company and to increase permanent clerical employees' skill and knowledge for better job performance as well as to increase their general level of education.

Development. The need to provide formal employee training was recognized by the company when it was reorganized in the early 1950's. Examination of present informal training methods showed that they would not be adequate for executing the training function of an expanding company. Organized training was needed (1) to provide employees with improved job efficiency and increased job satisfaction and (2) to provide the company with a more efficient work force, a reduction in turnover, and an increased employee morale and team

spirit. The company implemented these needs by establishing a training department to develop and direct its training activities.

Responsibility. In-company training activities, both formal and on-the-job, are coordinated and developed by the director of the training department. Formal programs are taught by the training department's personnel or by specially trained office supervisors. On-the-job training activities are supervised both by the new employee's division manager and by his or her immediate supervisor.

In general, program instructors' duties and their background are not described in this case. Programs are taught by various company personnel. These instructors conduct only a small amount of training, and often not on a regular basis.

Trainees. Orientation and induction training is given to all new clerical employees. Stenographic pool training is limited to new employees preparing for secretarial positions. Company courses are given to all or to selected clerical employees.

Physical Facilities. Orientation and induction training is held in one of the classrooms belonging to the training department and then in the company's work area. Stenographic pool training is carried on completely in the work area. Company courses are held in classrooms belonging to the training department. The company's cafeteria is used when course enrollment exceeds 100 employees.

Schedule. Orientation and induction training and company courses are offered as needed. Training for the stenographic pool begins each June. All of these programs, with the exception of two general education courses, are conducted during working hours.

Courses held after working hours are more costly and involve more administrative detail. Company regulations state that employees who work a 40-hour week must receive supper money as well as time and a half when they attend company-sponsored courses after working hours.

Programs. Clerical employees are provided with the following organized training activities: (1) orientation and induction training, (2) stenographic pool training, and (3) company courses.

I. Orientation and Induction Training

Orientation to company policies and procedures plus skill training in job duties and procedures are given to all new clerical employees in a seven-day period. Explanation of company policies and procedures is covered in one day by the training director and each employee's division manager. If several new employees are present, a company film is shown; and a department representative describes company benefits in detail.

Employees spend the remainder of the seven-day period completing job assignments guided by supervisory personnel. Employees are grouped by employee classification or type of work assigned, such as stenographic, IBM machines, or general clerical work. Upon completion of training each employee's performance and progress are reviewed by her division manager. Additional assignments are given if necessary.

II. Stenographic Pool Training

Purpose. This program prepares new employees for the stenographic pool which in turn prepares them for permanent secretarial assignments.

Trainees. Each June the personnel manager employs 20 high school graduates with a knowledge of shorthand and typewriting as trainees for secretarial positions. Applicants are very carefully screened through tests and interviews. Selection is based more upon an applicant's future potential than upon present skill accomplishments. The personnel manager believes that skills can always be upgraded when the trainee has the desired potential. Selected applicants are assigned to the stenographic pool as "clerk trainees."

Responsibility. The pool's supervisor is responsible for training clerk trainees. Twenty-four years ago the supervisor joined the company as a secretary and seven years ago was promoted to her present position. Formal preparation for this assignment included completing job instruction courses provided by the company.

Schedule. Clerk trainees spend their first day of employment attending orientation and induction training. On the second day, they begin training in the stenographic pool. Trainees usually complete their preparation for permanent positions within six months.

Objectives. Pool training is designed (1) to improve basic skills and (2) to provide a working knowledge of those secretarial duties involving shorthand and typewriting.

Content and Instructional Methods and Materials. Program content is concerned with orientation to company policies and

procedures, with skill training in job duties and procedures, and with skill training in basic skills. Trainees begin their stenographic pool training by typewriting straight-copy work, form letters to customers, and fill-in forms. Typewriting accurately is stressed. Stenographic work gradually is introduced as a trainee's typewriting skill improves.

Trainees are given additional experience by being loaned out to other departments. They fill in for secretaries when they are on vacation. In these temporary jobs, trainees perform typewriting duties. Temporary jobs with duties requiring more skill and responsibility are assigned to trainees after they have obtained sufficient experience in the pool to enable them to handle such duties. Letters are transcribed from a dictator's longhand notes until the trainee is ready for shorthand dictation.

Reward. The pool's supervisor determines when each trainee's job performance indicates training has been satisfactorily completed. Upon completion of training, the personnel department is notified. The trainee then is assigned to a permanent secretarial position as soon as an opening occurs.

Evaluation. The pool's supervisor continuously examines the quality of each trainee's work and checks with supervisors about each trainee's performance on loan-out assignments. Additional training is given when needed.

III. Company Courses

The training department provides the following courses when needed for permanent clerical employees: (A) customer relations,

(B) effective reading, and (C) telephone courtesy. In addition, permanent clerical employees may attend with all other company employees two courses in economic education: (D) how our business system operates and (E) the American free enterprise system.

These courses are described below according to trainees, schedule, objectives, content, and implementation. The first three courses are designed to improve employees' job performance; the last two courses, to broaden employees' general educational background.

A. Customer Relations

Trainees. Clerical employees with duties involving contact with the public are eligible to attend. Supervisors and/or division managers provide the training director with names of employees who should enroll. Classes are limited to groups of 18 to 20 clerical employees.

Schedule. Each course consists of five two-hour sessions given over a three-day period on company time.

Objectives. This course is designed to develop good customer relations techniques.

Content. The philosophy of good customer relations is covered. The theme of the course is that "while the sales department isn't the company, the whole company ought to be the sales department." Employees are encouraged to realize that their most important job is to satisfy customers. Techniques for talking, writing, and listening to customers are discussed and practiced. Effective methods for handling complaints are presented.

Instructional Methods. Theory is presented in the first two-hour session. The remaining sessions are devoted to discussion and practice aided by sound films. Supervisory employees from different departments participate in panel discussions to help trainees obtain a companywide concept of customer relations. Role playing is used extensively to practice techniques designed for effective customer relations.

Instructional Materials. Instructional materials have been developed by the training department's staff.

Evaluation. Supervisors observe the performance of course participants to determine if more training is needed. Supervisors continue to appraise employees' performance. If necessary, supervisors give employees individual counseling or request they attend another two-hour meeting.

B. Effective Reading

Trainees. Clerical employees either may volunteer or be requested by their supervisors to attend. Each class is limited to a group of 10 to 12 clerical employees.

Schedule. Classes meet for a two-hour weekly session for eight weeks on company time.

Objectives. This course is designed to improve employees' reading skills. Its minimum objective is to double the reading speed while maintaining or increasing comprehension.

Content. This general education course includes a thorough discussion of the thinking process in reading combined with practice in reading more effectively. Physical factors involved in reading also are studied, such as the ability to see quickly and accurately with increased eye span.

Instructional Methods and Materials. Instructional methods include a combination of lecture and discussion techniques. Slides are used to highlight the discussion of principles. The tachistoscope projector is used to develop speed and accuracy in seeing with increased eye span. Mechanical exercises are used to develop rhythm in reading. Reading rate accellerator machines are used to break slow reading habits. Instructional materials are prepared by the training staff.

Evaluation. Course participants are tested during the last class session to determine the amount of progress that has been made. At a later date the training director follows up training by discussing each trainee's job performance with her immediate supervisor.

C. Telephone Courtesy

Trainees. All clerical employees who use the telephone in performing their job activities are required to attend as soon as arrangements can be made. Each class is limited to a group of 10 to 20 employees.

Schedule. Each class meets one and one-half hours each week on company time for three to six weeks depending on the needs of the group.

Objectives. This course is designed to develop courtesy and effectiveness in handling the telephone.

Content and Implementation. Course content is concerned with skill training in telephone techniques. Fundamentals of good telephone techniques are explained, demonstrated, and practiced. The Bell Telephone Company's film, "Telephone Courtesy," is shown. Each class member also records her voice. These recordings are evaluated to help class members improve their voice quality.

Future Course Expansion. The training director is in the process of enlarging the present telephone courtesy course. A program is being developed to provide continuous improvement of telephone usage. It will involve analysis of employees' telephone contacts with customers.

Three office supervisory employees, especially trained, will be assigned the full-time responsibility of spot checking employees' telephone calls to customers. These supervisors will monitor employees' calls. Each of the employees whose calls are monitored will receive an appraisal report of his or her telephone conversation. If the employee seems to need additional telephone training, the employee's supervisor will be notified in order to provide individual counseling.

D. How Our Business System Operates

Trainees. Each class is limited to a group of 10 to 20 company employees. Attendance is voluntary.

Schedule. Classes meet for three one-and-a-half-hour sessions after working hours.

Objectives. This course is designed to provide employees with a general understanding of and a greater appreciation for the American business system.

Content. This general education course includes the following topics: our American business system, accomplishments under our system, the importance of competition, individual freedoms under our system, proposed changes in our system, and our company--its story.

Instructional Methods and Materials. Lecture and discussion techniques are used. Instructional materials have been compiled from various outside sources by the staff of the training department.

Evaluation. Course attendance is noted on each employee's personnel record.

E. The American Free Enterprise System

Trainees. Up to 500 employees may attend at one time. Attendance is voluntary.

Schedule. The course is held for one two-and-a-half-hour session after working hours.

Objectives. This course is designed to stimulate interest in the American free enterprise system and to promote more understanding of its benefits, challenges, and responsibilities.

Content. This general education course discusses the American free enterprise system in terms of its foundations, factors of production, advantages, challenges to it, and our individual responsibilities.

Instructional Methods and Materials. Lecture aided by sound film is used. Instructional materials have been compiled from various outside sources by the staff of the training department.

Evaluation. Course attendance is noted on each employee's personnel record.

Out-of-Company Training

Financial assistance is available to employees who wish to continue their education. Each semester an employee may borrow a maximum of $200 from the company toward the cost of approved courses. Loans are repaid within one year through payroll deductions. No interest is charged. If an approved course will help an employee in his or her work with the company, one-half of its cost will be refunded upon satisfactory completion of the semester. Employees are eligible to apply for tuition aid after they have been employed by the company for three months. Courses must be completed at an accredited college.

Case N

Skill Training Courses for Typists, Stenographers, and Secretaries

In this insurance company clerical employees learn their jobs by various combinations of class instruction and on-the-job training by predecessor, supervisor, and fellow employee. The company offers no tuition aid plan to its nearly 1,000 clerical employees but instead has developed a vestibule training school to fit their needs while employed with the company.

In-Company Training

Purpose. Formal training is given to prepare new secretarial employees for work in the company and to increase knowledge and skill of permanent typists, stenographers, and secretaries for better job performance and for job advancement.

Development. Management found that new typists tended to be deficient in certain skills and that a gap existed between high school training and point of employment. Long-term typists, stenographers, and secretaries also needed training to perform their present job activities more efficiently and to become eligible for advancement within the company.

In 1960, the company undertook to fill these needs by establishing a vestibule school. The supervisor of training in the personnel department with suggestions from department managers and other company executives developed a secretarial services training program, a group of skill training courses, and an orientation course.

Responsibility. The supervisor of training is responsible for organizing formal clerical activities. A full-time secretarial instructor is employed to conduct classes specially designed for clerical employees following course objectives outlined by the supervisor of training. Other members of the training staff conduct orientation sessions.

The present secretarial instructor has been employed by the company for one year. Her job duties involve teaching an average of four classes a day, preparing lessons, and checking trainees' papers. The instructor's educational background consists of a B. S. degree in business education plus nine graduate credits. Previous experience consists of five years of teaching business subjects in a high school and in a business school. No business experience is reported.

Trainees and Vestibule Training Schedule. From June through August vestibule training is carried on all day for new employees classified as typists. During the remainder of the year from October through May, hour courses are offered to permanent clerical employees classified as typists, stenographers, and secretaries. Orientation classes for all new employees are scheduled as needed throughout the year.

Physical Facilities. Orientation sessions are held in one of the all-purpose classrooms of the training department. Clerical training activities are held in a training room containing 15 double-pedestal desks, each equipped with a typewriter and a transcribing unit. Of the 15 typewriters, 10 are manuals, and 5 are electrics. The same proportion of manuals to electrics exists throughout the

company. The room also contains an identical desk for the instructor and teaching aids such as blackboards and typewriting charts.

Cost. The training department has its own budget but does not list clerical training costs separately. The major expenses of vestibule training for clerical workers, which included office furniture, office machine equipment, and textbook costs, were charged when training first was introduced. Operating expenses of the program currently involve instructor's salary, some textbook replacements, and paper supplies for students. Salaries of employees while training are charged to their assigned departments.

Items being considered for future purchase include a collegiate dictionary, a shorthand dictionary, and a secretarial reference manual for each desk plus phonograph records for shorthand dictation and for typewriting speed and rhythm practice.

Programs. Vestibule training activities are described below: (1) secretarial services training, (2) skill training courses, and (3) orientation.

I. Secretarial Services Training

Purpose. The secretarial services department is a typists' pool consisting of 24 employees. These typists complete typewriting and machine transcription assignments provided by any one of the company's 38 departments. After a year in the pool, typists are eligible for transfer to positions in other departments. Vacancies in the secretarial services department are created during the year by these transfers as well as by terminations of employment. Each June the number of employees needed to restore the department to its

original size is hired. A secretarial services training program has been developed to prepare these new employees for their pool assignments.

Trainees. Trainees are high school graduates with ability to type but with no previous business experience. They are classified as typists when employed. The number selected for training is equal to the number of vacancies existing in the secretarial services department at the time the program is offered. The number of trainees needed each June usually ranges between 12 to 15.

Schedule. The program begins in June and ends some time in August. Classes meet every day from 8:45 a.m. to 4:45 p.m. Trainees usually attend classes for a period of six weeks. Length of training varies directly with the amount of skill training needed by each participant for satisfactory job performance.

Objectives. Training is designed (1) to develop trainees' present skills to levels desired for their new jobs and (2) to provide them with knowledge of company secretarial policies and procedures.

Content and Instructional Methods. Program content is concerned with orientation to company policies and procedures, with skill training in job duties and procedures, and with skill training in special skills and knowledges. The program includes a review of typewriting procedures, practice in improving speed and accuracy in regular and in number typewriting, machine transcription practice, and a review of English fundamentals. General information about insurance, including some terminology, and secretarial policies and

procedures common to the company as well as to each department are also covered.

Lecture and demonstration techniques are combined with individual instruction and machine practice. Each trainee is responsible for making her own company style manual. In the manual, a trainee includes information about company and department procedures as well as a copy of each different letter that she transcribes from a machine. These letters are company letters that have been originally transcribed in one of the departments in the bank and sent to the supervisor of training for use in this program. Preparation of the manual serves a dual purpose:

1. Trainees receive practice in performing various types of procedures.
2. Trainees are provided with a reference guide for on-the-job use in their new positions and in any future positions in other departments.

Instructional Materials. Each trainee is given the following materials to be returned upon completion of training: college typewriting textbook, college spelling textbook, word usage textbook, a list of insurance terms, and a two-page mimeographed list of words commonly misspelled and misused.

Reward. Each trainee is transferred to the secretarial services department as soon as her company style manual is completed and her class performance indicates satisfactory completion of training.

Evaluation. The instructor tests each trainee at the beginning and at the end of training to determine her percentage of improvement and to compare her progress with the performance of the group. Tests cover speed and accuracy on straight-copy material and ability to

type letters. Trainee's percentage of improvement is reported on her permanent employment record.

During training, the wide range of activities and abilities makes it difficult to grade class work. A daily record is kept only of the number of mailables typed by each trainee. Satisfactory performance is evidenced by the steady increase in the number of mailables as training progresses.

II. Skill Training Courses

Purpose. Permanent clerical employees are offered skill training courses to help improve their present job performance or to increase their eligibility for job promotion.

Trainees. The secretarial instructor notifies department managers when courses are to be offered. Department managers, in turn, notify all clerical employees with some longevity. These employees may apply for admission to any course for which they can qualify. Those employees that can qualify for course admission and that are interested in attending a course then notify their department managers. Department managers then recommend to the secretarial instructor those employees from this group that deserve and will benefit from such training, as evidenced from observations of their job performance.

Employee qualifications necessary for admission to these courses are specified below under the heading "trainees" of each course description. In general, enrollment in each course is limited to 15 employees. Employees may be absent from class whenever their job activities require their presence.

Schedule. Skill courses are offered from October through May. Usually four or five courses are in process at one time. No courses are in session during a five-week period that extends from the last two weeks in December through the third week in January. During this period, the company's volume of business increases to such an extent that department managers urgently need their employees to handle increased work loads. Such a situation makes it impractical for them to release employees for an hour of class work.

Courses. The following courses are described according to purpose, trainees, schedule, objectives, content, and implementation: (A) principles of shorthand, (B) intermediate shorthand, (C) advanced shorthand, (D) typing skills improvement, and (E) secretarial skills improvement.

A. Principles of Shorthand

Purpose. This course gives employees an opportunity to learn another secretarial skill for eventual advancement within the company.

Trainees. Employees who are classified as typists, who have no previous shorthand training, and who are recommended by their department managers may enroll. They may discontinue the course at any time. Other employees may enter at the beginning of the second part if class space is available and if they have some previous shorthand theory knowledge. If trainees are absent from many classes, they may re-enroll the following year.

Schedule. The course meets an hour a day for a 25-week period. The first part begins in October and lasts ten weeks. After a five-week break, the second part begins and continues for the remaining 15 weeks.

Objectives. The course is designed to provide a basic foundation of Gregg simplified shorthand theory.

Content and Implementation. The course covers principles of shorthand theory and some dictation. One lesson from a beginning high school shorthand textbook is covered in each class meeting or, when necessary, in two meetings. Toward the end of the course, practiced material is dictated and occasionally transcribed on the typewriter.

No tests are given until the end of the course. At that time, a 100-word shorthand theory test is administered. During the course, two hours of homework are assigned for each class hour, with longer assignments given over weekends. Textbooks are lent to the trainees while enrolled in this course.

Trainees satisfactorily complete the course by regularly completing homework assignments and by passing a 100-word shorthand theory test with a minimum grade of 90 per cent.

B. Intermediate Shorthand

Purpose. The company encourages typists with some knowledge of shorthand to develop their shorthand skills for eventual promotion to stenographic positions.

Trainees. Employees who are classified as typists and who have completed a shorthand theory course are eligible to enroll. Typists may discontinue the course at any time; others may enroll whenever a space is available.

Schedule. An hour session is given three times a week, Monday, Tuesday, and Thursday, for 25 weeks. The course is held from the beginning of October to the end of May.

Objectives. This course is designed to help trainees increase their dictation speeds and become acquainted with shorthand outlines for insurance terminology. No specific goals in dictation speed have been established for the course. Varying needs and intermittent attendance of class members make course flexibility essential.

Content and Implementation. The course includes a shorthand theory review, presentation of insurance terms with shorthand outlines, and letter dictation at speeds geared to class members' needs. A lesson a day is presented from an intermediate high school shorthand textbook. Each trainee is lent a copy of the textbook while enrolled in the course.

Trainees are assigned two hours of homework for each class hour with double assignments to be completed over weekends. Assignments consist of writing in shorthand one line of all new words and one copy of all letters presented in a lesson.

Trainees satisfactorily complete the course by regularly completing homework assignments, by passing a 100-word shorthand theory test with a minimum grade of 90 per cent, and by passing a test on insurance terms and corresponding shorthand outlines. Both aforementioned tests are given at the end of the course.

C. Advanced Shorthand

Purpose. This course is given to help typists and stenographers prepare for promotion to stenographic and secretarial positions, respectively.

Trainees. Employees who are classified as typists and stenographers and who have basic shorthand skills are eligible to enroll. They may discontinue the course at any time; others may enroll whenever a space is available.

Schedule. A one-hour session is held three times a week, Monday, Wednesday, and Thursday, from the beginning of October through the end of May.

Objectives. This course is designed to help trainees increase or maintain their shorthand dictation speed, to improve their transcription skill, and to acquire a shorthand vocabulary of insurance terms. Trainees must pass at least one three-minute mailable letter dictated at 120 words per minute. Some trainees exceed the minimum skill goal and transcribe three-minute mailables at 120, 140, and even 160 words per minute.

Content and Implementation. This course includes shorthand theory review, letter dictation, and transcription with particular emphasis upon insurance terminology and dictation. Business letters are dictated from teachers' dictation books, shorthand textbooks, and recently dictated and transcribed company correspondence. Dictation practice ranges in speed from 110 to 180 words per minute for periods of one minute up to five minutes.

Each trainee is lent a copy of an advanced college shorthand textbook and is given a list of insurance terms with corresponding shorthand outlines prepared by the instructor. Homework assignments are identical in design to those assigned in the intermediate shorthand course.

Trainees satisfactorily complete the course by regularly completing homework assignments and by passing at least one three-minute mailable letter dictated at 120 words per minute.

D. Typing Skills Improvement

Purpose. This course is set up as a typewriting clinic to help typists improve their speed and accuracy.

Trainees. Typists who can type a minimum of 20 to 25 words per minute are eligible to enroll. Typists with some company longevity are preferred in order to give department managers an opportunity to assess whether training would be beneficial to them. The instructor also permits an employee to attend one or two classes as a means of assuring that

her typewriting speed is adequate for attaining course objectives.

Schedule. A one-hour daily session is held for five weeks. The course is offered five times during the 25-week period.

Objectives. The aim of the course is to strive for 50 words per minute with no errors on a ten-minute timing.

Content and Implementation. Class instruction concentrates upon building speed and accuracy both on straight-copy material and on number work. Typewriting drills are geared to the needs of each employee. Timings consisting of one, ten, and fifteen minutes are given. Ten-minute timings are preferred. The instructor considers these timings a better indicator of the typewriting ability of those employees who type all day. Occasionally 30- to 60-minute timings are given as a means of gaining further indication of typewriting ability as well as an instructional device for keeping trainees' interest.

A college typewriting textbook is used. This book is not removed from the classroom. No homework is assigned. Upon completion of the course, the trainee's department manager receives a report of her typewriting speed and accuracy.

Trainees satisfactorily complete the course by increasing their typewriting speed and accuracy on ten-minute timings. Typewriting performance at the beginning

of the course is compared with typewriting performance at the end of the course.

E. Secretarial Skills

Purpose. This course helps employees improve their secretarial performance.

Trainees. Employees classified as stenographers and secretaries attend. Employees may be requested by their department managers to attend or may enroll voluntarily with approval of their respective department managers.

Schedule. This course is offered whenever a group of employees are reported weak in any secretarial skill. A one-hour session is given three times a week for 12 weeks.

Objectives. This course is designed to improve secretarial skills and is geared to the particular needs of each group of participants.

Content and Implementation. Program content is concerned with skill training in overcoming secretarial skill deficiencies. A brush-up of basic rules of English mechanics, typewriting, and those areas in which the majority of the class need training is given. A transcription textbook is lent to each trainee.

Example of a Course. A course usually is scheduled in October for employees recently transferred from the secretarial services department to positions with more responsibility in other departments. These employees need training to overcome certain secretarial deficiencies that

are preventing them from satisfactorily performing their new job duties.

Evaluation. Upon completion of a course, a report of satisfactory or unsatisfactory course performance is added to each employee's permanent company record.

III. Orientation

Purpose. This program is given to prepare new employees for work in the company.

Trainees. All new clerical employees attend.

Schedule. The ten-hour course, conducted by a training staff member other than the secretarial instructor, is given about a month after employment. The supervisor of training finds that the program becomes more meaningful to employees when given after they have been with the firm several weeks than when given immediately after their employment.

The program is offered as often as needed. It consists of a daily session held for one hour, usually from 9 to 10 a.m., for a period of two weeks. When the secretarial services training program is in operation, two sections of the orientation program are conducted. One is held from 9 to 10 in the morning; and the other, from 10 to 11. Half of the trainees in the secretarial services training program are placed in each section. While one group is attending orientation, the other group is being given intensive secretarial training by the secretarial instructor.

Objectives. The program is designed to acquaint new employees with life insurance in general and the company in particular.

Content and Implementation. Program content is concerned with orientation to company policies and procedures. Topics include general company policies and procedures, personnel policies, and information about insurance.

Instructional methods include lecture and discussion techniques. Instructional materials are prepared especially by the training staff for the program.

Case O

Comptometer Training Program

Employees are considered the most important asset to this large food and mercantile retail distributing company. A major part of this company's successful growth is attributed to its interest in employees' self-development and advancement within the company. This philosophy is reflected in the company's promotion from within policy and in its training activities for employees. The company's 400 clerical employees are offered comptometer training and subsidized training after working hours. Job duties are learned on the job supervised by a predecessor, when possible; otherwise, by a supervisor or a fellow employee.

In-Company Training

Purpose. Formal training is designed to provide interested permanent clerical employees with a skill that will qualify them for job advancement. Skill training conducted for these employees is described below.

Development. This company was faced with a shortage of comptometer operators. Study of the situation showed that a course in comptometer training could be easily set up in the comptometer section of the company's office. Employees would not have to leave company premises, and the company would not have to invest in special equipment.

In the spring of 1964, the company offered its first course in comptometer training to help alleviate its shortage of operators. At

the same time, this training provided company employees with an opportunity to learn a skill to qualify for job advancement.

Responsibility. The staff of the training department is responsible for developing and administering training activities. The instructor implements training objectives by determining course content and conducting classes. The personnel department determines whether or not trainees can qualify for comptometer positions.

The course instructor is a "senior comptometer operator" who is employed by the company as a full-time comptometer operator with highest rating in this category. Educational background includes graduation from high school and from comptometer school. Experience includes 20 years as a comptometer operator and 6 years as an instructor at a comptometer school.

If no company employee had been qualified to instruct the course, an instructor would have been sought from one of the comptometer schools in the area.

Trainees. Trainees are high school graduates. Some have studied other business subjects in high school or in business school. They currently are employed in the company's accounting division as "file clerks" or "clerks."

The training department sends a notice to department heads announcing plans to offer a comptometer course and requesting names of employees who wish to enroll. Trainees are selected from among these employees on the basis of seniority and department head recommendations. Employees' enthusiasm for the course is evidenced by a list of employees waiting to be trained.

The first group trained contained three trainees. Succeeding groups have been increased to six trainees. This class size fits in with the proposed plan to offer the course four times a year and to provide the company with 24 skilled operators during the same period.

Schedule. The course is offered four times a year. Each course consists of ten two-hour classes held during a three-week period. Four classes are held the first week; four classes, the second week; and two classes, the third week. Classes meet from 4 to 6 p.m. They have been scheduled to follow the regular workday schedule, which runs from 8:30 a.m. to 4:00 p.m.

Physical Facilities. No special physical set up for the course is necessary. Classes are held in the comptometer section of the company's office.

Cost. The only costs of the program are current operational expenses. These expenses are incurred each time a course is given. They include one textbook for each trainee and the instructor's hourly pay.

Objectives. The course is designed to train in those comptometer skills that are required for beginning comptometer positions.

Content. Program content is concerned with skill training in comptometer operation. The program is tailored to meet varying abilities of trainees and minimum skill requirements for beginning comptometer positions. The four operations of addition, subtraction, multiplication, and division are covered. Accuracy, rather than speed, is emphasized in the course. The number of textbook lessons

completed and the degree of skill achieved vary according to each trainee's rate of progress.

Instructional Methods. Instruction is conducted on an individual basis to permit each trainee to advance at her own rate. No homework is assigned.

Instructional Materials. The training department purchases a standard comptometer textbook for each trainee. The book is kept by the trainee for reference and further study. The textbook provides instruction in all comptometer operations.

Evaluation. During the course, tests that accompany the text are used as guides to determine each trainee's progress. Upon completion of training, the instructor verbally reports each trainee's performance to the personnel director. These appraisals are added to the employee's personnel record.

The personnel department also gives each trainee a comptometer employment test to determine whether or not she qualifies for a beginning comptometer position. Of the three girls who took the first course, two were placed immediately as comptometer operators; and the third, a short time later.

Follow-up. The training department keeps the personnel department informed of those employees who have successfully completed comptometer training or evening courses that the company subsidizes at Hickox Secretarial School. Such frequent notifications to the personnel department help increase the likelihood that these employees will be considered when openings occur that require their qualifications.

Out-of-Company Training

The training department has made arrangements with the evening division of Hickox Secretarial School to have clerical employees take courses in typewriting, shorthand, and related subjects at the company's expense. This school was selected because its course structure is suited to the company's needs. Skill courses are offered without interruption and not on a term or semester basis. A student may enter a course at any time and withdraw whenever she has reached the goals of that course.

Trainees. Employees notify the training department when they are interested in taking an evening course. The training department then determines the course(s) that each employee may take at company expense and when the course(s) may be taken. The department gives priority to employees who need to improve their skills for use in their present jobs. After this group is trained, employees who wish to attain higher clerical ratings with the firm are given the opportunity to take courses. These employees either have had no previous skill training or need skill refresher training to become eligible for advancement.

Each year the training department sends an average of ten employees to this school. The number of employees that are permitted to attend each year is dependent upon the amount of money allotted for such training and how much of this amount each employee uses. Some employees attain their goals in ten weeks; others, in 20 weeks. As soon as an employee completes her course work, another employee takes her place.

Evaluation. The school sends a report of each employee's course performance to the training department. Employees must pass each course with a minimum grade of 75 per cent or reimburse the company for the cost of the course.

The company also assesses these employees in conjuntion with its periodic evaluation of all employees. All employees are evaluated by their supervisors on a yearly basis; new employees, at the end of the first three months, 6 months, and 12 months and then every year thereafter. The effect of out-of-company training on an employee's job performance is noted in these reports.

Follow-up. The same practices that are used for comptometer training are followed.

Case P

Comptometer Training Program

This firm is the Boston unit of a decentrally operated nationwide retail organization. Each unit develops its own training practices and policies; training plans developed by top management are followed when feasible. The Boston unit provides its 500 clerical office workers with on-the-job supervision, training manuals, and, when the need arises, vestibule training in clerical skills. Its clerical employees are not included in the unit's tuition aid program.

In-Company Training

Purpose. Formal training is given in typewriting to prepare new clerical employees for work in the company and to prepare permanent clerical employees for better job performance or for job advancement. Formal training soon will be given to prepare new and permanent clerical employees as comptometer operators. Training activities described below are: (1) on-the-job training, (2) vestibule training, and (3) future training activities.

I. On-the-Job Training

This type of training is described here in order to report all organized training activity carried on by the unit. In each department job instruction for new and old clerical employees is delegated to one employee, a department instructor. This instructor may supervise one employee or as many as six employees at one time depending upon the season and the job. Employees who do not meet minimum

performance standards after a period of supervision are transferred to other jobs.

The procedure of assigning the training function to an employee within each department has been beneficial in increasing the consistency and efficiency of clerical job performance. Department instructors are long-term employees who have advanced through the echelon of clerical positions to their present ones. They also have shown ability to get along with others and to follow job procedures established by their respective departments. Some instructors have attended or completed college, but the majority are high school graduates.

Training manuals also aid instructors and employees. A manual has been prepared for each clerical job by the multi-unit's top management. Each manual provides a detailed job analysis and describes the importance of the job's activities to the successful functioning of the office.

II. Vestibule Training

Purpose. The employment manager of the personnel department provides whatever clerical class instruction may be needed. At present formal instruction in typewriting is being offered. This course is given either to teach employees how to type or to help them improve their present typewriting skills for better job performance or for promotional purposes.

Development. The unit's need for well-qualified typists resulted in its providing typewriting instruction. Many variations of typewriting programs were tried intermittently during the past

few years until the present program was established in February 1964. Up until this time, courses were conducted by company employees who were not professionally trained to teach typewriting. Participants of these courses often did not attain desired typewriting goals. The employment manager decided that better results might be achieved by employing instructors trained to teach typewriting. These instructors would be skilled in determining and providing for various needs of course participants. Such instructors are currently conducting the present program and are successfully achieving the desired training goals.

Responsibility. The employment manager, who is in charge of all clerical training activities in the unit, develops and administers the typewriting program. Typewriting instructors conduct classes by implementing course objectives specified by the employment manager.

Two business teachers share the teaching assignment as a means of relieving the work load. They teach the same class by alternating days. Both typewriting instructors have a master's degree in business education. One instructor has been teaching in high school for five years; the other, for over 20 years.

Trainees. The typewriting background of applicants for training ranges from no knowledge to typewriting ability of 40 to 50 words per minutes with few or many errors. Applicants may be employees that have taken the college course in high school with no opportunity to learn typewriting or employees that need to improve their typewriting accuracy and/or speed.

Applicants are general clerical employees, typists, and stenographers who usually have been with the firm for 24 weeks or more. New employees may be considered candidates if training would prepare them for a particular position and if satisfactory ability ratings were achieved on pre-employment tests.

The personnel department maintains a list of applicants recommended for training either by department managers or by members of the personnel department. When final selection for training is to be made, both groups join together in reviewing each applicant's scholastic and employment records. An attempt is made to select applicants who will benefit both themselves and the company by this training experience.

Equipment facilities limit classes to a maximum of 12 trainees. A class of this size is considered maximal for individual instruction. At least five trainees are in attendance at all times.

Schedule. Typewriting instruction is given continually throughout the year. A maximum of 75 hours of instruction is considered adequate for a person with some typewriting knowledge. Some trainees need less time to achieve their particular goals; others need more time. The course may be extended to 100 hours if instructors believe more training would be beneficial. No course extension is given when a trainee has been showing lack of interest, poor attendance, or little typewriting improvement.

The course meets one and a half hours each day from 3:00 to 4:30 p.m. The employment manager schedules the course at a time that high school teachers will be available for employment as course

instructors. Preference also is given to scheduling the course during regular working hours rather than after working hours. This procedure avoids paying trainees time and a half and giving them a meal allowance.

Physical Facilities. An office in the personnel department has been converted into a typewriting classroom equipped with 12 manual standard typewriters. At first, rented machines were used because the company had no extra ones in satisfactory condition. Within two months, these were replaced with 12 new machines.

Cost. The personnel department has no specific budget allocated for training clerical employees. The general manager of the unit approves a written estimate of training costs before any program can begin. No further approval is necessary.

The visible expenses of the program are classified as initial expenses and current operating expenses. Initial expenses include purchase of 12 typewriters, 12 typewriting textbooks, and 12 reference manuals. Operating expenses are instructors' salaries; in the past, typewriter rental cost was included. Instructors teach a combined total of about 30 hours a month.

Paper is supplied without charge by the personnel department. Payroll expense of employees while training is absorbed by each employee's department.

Objectives. The course is designed (1) to teach trainees how to typewrite or (2) to help trainees improve present typewriting habits, speed, and accuracy in order to attain typewriting standards required by their present or future job assignments.

Content. Course content depends somewhat upon the typewriting ability of each trainee. More emphasis is placed upon improving typewriting accuracy and presenting transcription pointers than upon developing high typewriting speeds. Instructors work together to select drills and timed writings suited to each trainee's needs.

Instructional Methods. Typewriting instruction is given on an individual basis to meet each trainee's needs. No outside work is assigned.

Instructional Materials. Each trainee is provided with a high school typewriting textbook and a secretarial reference manual to use during training. These materials are company property and remain permanently in the classroom. The reference manual is used only for supplementary purposes. Any trainee who can use a reference manual on the job is given a copy to keep.

Rewards. Upon completion of training, trainees who would not be able to use their new typewriting skills in their present jobs are promoted to positions requiring these skills.

Evaluation. Throughout the course, instructors keep a record of each trainee's attendance and typewriting progress. This information helps to determine whether or not more training is needed and to justify extending the number of hours of instruction.

A week before a trainee is scheduled to complete training, one of the instructors notifies the employment manager. The latter makes arrangements for the trainee to be tested. The test is administered at the end of the course when typewriting performance should be optimum. It consists of a five-minute straight-copy timing preceded

by a five-minute practice session. The trainee's speed and accuracy progress is evaluated by comparing this test with her performance on a similar test that was given at the start of training.

Test results are reported by the number of gross words per minute and number of errors, i.e. 45/2 means 45 words per minute with two errors. The employment manager prefers to use this method of reporting in assessing as carefully as possible the employee's ability to typewrite. In class, typewriting instructors prefer to deduct ten words for each error from the total number of words typed during a five-minute writing.

The employment manager has set up certain typewriting standards. A standard of 55/2 on a five-minute test is the minimum requirement for correspondence jobs. Typewriting speeds below this standard are permitted for certain routine jobs. No speed less than 40/2 for five minutes is acceptable for any position.

In 75 to 100 hours of instruction, trainees often double their typewriting speeds along with decreasing their errors, i.e. from 27/5 to 56/2. Others have shown gains primarily in accuracy, i.e. from 49/5 to 55/1. The employment manager analyzes unsatisfactory test performances according to types of errors. These findings are discussed with the trainee. If the employment manager thinks the trainee may have been nervous during the test, a retest is administered.

Follow-up. Shortly after the trainee has completed the course, the employment manager checks with the trainee's department manager to determine how she is doing and to learn whether or not she is using her new skills. If the trainee is not doing satisfactory work

or is not using her new skills, she may be transferred to a position more suited to her abilities.

III. Future Plans

The company is planning to offer (A) comptometer training and (B) additional typewriting instruction.

A. Comptometer Training

Although many comptometer operations are being taken over by computers, many jobs still remain. The employment manager is developing plans to train comptometer operators even though some employees may decide to leave after being trained. A combination of circumstances is making this training necessary.

1. A shortage of operators currently exists.
2. Enrollment has dropped in those comptometer schools that previously supplied the company with operators.
3. Present operators are unable to operate machines as efficiently as needed.
4. The past practice of sending employees to comptometer school for training has proved unsatisfactory.

In the past the employment manager sent employees to a nearby comptometer school whenever training was needed. The company paid each employee's tuition. Employees attended school a half day and worked at the company a half day. The basic course included 25 hours of class instruction. The course was extended an additional week if the employee's job assignment required more proficiency or speed in

certain phases of machine operation. The employment manager found that this plan was not completely satisfactory. Problems arose concerning employees' traveling between school and company.

A basic course in comptometer training is being planned to train new and interested permanent employees to qualify for positions as comptometer operators. The course will be offered during working hours on the company's premises. Trainees will be selected on the basis of arithmetic scores attained on pre-employment tests. An instructor from a comptometer school will be sought to teach the course. Such an instructor is considered more likely to be highly skilled in the intricacies of comptometer work than a high school business education teacher.

B. Additional Typewriting Instruction

Plans are being made to employ housewives with typewriting skills. These employees will be given instruction to improve their skills in typewriting numbers. They will be employed from nine to two, five days a week. These working hours have been selected to fit with their children's school schedule. The first week of employment will combine classes in typewriting with job assignments that require no typewriting.

Typewriting instruction will be designed to develop competency in typewriting numbers. In this instance, a company employee will conduct a one-hour class each day

for one week. Classes will be limited to six employees to facilitate individual instruction by a company employee. Upon completion of the course, each employee will be assigned a position involving number typewriting.

The employment manager also plans to offer a similar course to employees already engaged in this job activity. The course will concentrate upon improving speed and accuracy in number typewriting.

Case Q

Skill Training Courses for All Clerical Employees

An insurance company noted for its low turnover and many fringe benefits has established a vestibule school for its more than 1,000 clerical employees. This company has one of the most comprehensive in-company formal training programs of any company included in this study. New clerical employees are provided with key punch training; permanent clerical employees, with basic skill courses and supervisory training. Individual training is conducted upon request for special job assignments, physically handicapped employees, and employees soon to retire. Future training plans involve a workshop for secretaries. Such extensive vestibule training makes it unnecessary for the company to provide tuition aid for similar out-of-company activities. New and permanent clerical employees learn their regular duties by being instructed on the job by a supervisor, a fellow employee, or, if feasible, a predecessor. All employees who assist in job training have been prepared for this responsibility by the company.

In-Company Training

Purpose. Formal training is conducted to prepare new clerical employees for work in the company and to increase permanent employees' skill and knowledge for better job performance or for job advancement. A workshop to improve secretaries' job performance soon will be conducted regularly.

Development. The need to upgrade typewriting performance was instrumental in beginning formalized training for clerical employees. In 1953, vestibule training was instituted with the establishment of a typewriting program. Other skill subjects were added to the program until finally three years later the present program emerged.

Responsibility. The coordinator of employee development in the personnel department is in charge of developing and organizing vestibule training for clerical employees. Program offerings and content are based on employee needs expressed by division managers and on existing inabilities of new employees. Management tends to find that good high school records often are not indicative of new employees' job performance.

Three regular company employees conduct all formal training programs for clerical employees. They have been oriented and have continued to be guided by the coordinator of employee development. Two of these employees are full-time skill instructors. Each day they teach three or four classes or an average of four or four and a half hours. Their remaining time is spent preparing class presentations, correcting papers, and preparing trainee evaluations. They occasionally assist in pretesting employees and in substituting as key punch instructors for one or two hours at a time. The third instructor is in charge of key punch instruction. This assignment is performed as a minor duty. Her major job function is supervising the company's key punch operations.

Both full-time skill instructors are trained business teachers with bachelor degrees. In addition, the company has sent them to

secretarial conferences sponsored by Mary Markulin, Training Consultant, and to International Business Machines Corporation for key punch training. One instructor joined the company immediately after college graduation and has been with the company for two years. The other instructor has had five years of teaching experience in business schools and in junior colleges. She has been with the company for four years. Both instructors have worked as secretaries while attending college and during school vacations.

Educational background of the key punch supervisor includes a high school education and key punch training at International Business Machines Corporation. She has been with the company for 20 years, first as a typist, next as a key punch operator, and finally as supervisor of key punch operations.

Schedule. Skill courses are offered continuously throughout the year. About four to six courses are usually conducted at one time. Courses to be offered are determined by the company's needs. Key punch training is conducted continuously; training trainers, three times a year; and individual training, as needed.

Training is given on company time. Skill courses, training trainers, and individual training consist of daily sessions covering periods ranging from one week to eight weeks. Class sessions vary in length from one to one and a half hours. Key punch training is conducted all day for a two-week period.

Physical Facilities. Two rooms in the company's personnel department are available for instruction. One room contains 20 manual typewriters and is used primarily for formal training

involving typewriting and shorthand activities. The second room is a large room containing 15 long tables. This room is usually used for all other formal training, such as business arithmetic, business machines, secretarial procedures, and supervisory training. Business machines, such as Friden or Marchant calculators and ten-key adding machines, are rented when needed, usually for one- or two-week periods. Key punch instruction is held in the key punch section of the company.

Cost. The major expenses of vestibule training for clerical employees involve (1) salaries of instructors, (2) costs of secretarial textbooks and other training supplies, and (3) rental cost of certain business machines. These expenses are included in the overall training budget of the personnel department.

Programs. The following programs for clerical employees are described below: (1) skills training program, (2) key punch training, (3) training trainers, (4) individual training, and (5) future training activities.

I. Skills Training Program

Purpose. The purpose of this program is twofold: (1) to assist employees in increasing their proficiency in their present assignments and (2) to help employees develop their skills in order to be considered for higher level openings when they occur.

Trainees. The coordinator of employee development sends notices to all division managers when new courses are to be offered. The notice lists each course with the time it is to be given and the number of sessions involved. The manager fills in the notice by

recommending employees for each course and returns the notice to the coordinator of employee development.

Training is available to all clerical employees who (1) have been employed by the firm for at least six months or a year, (2) are recommended by their managers, and (3) possess the necessary background for succeeding in the selected course as shown by pretest scores.

Enrollment in all courses except typewriting is limited to 10 to 12 employees in order to permit individual instruction. An enrollment of 15 to 16 employees is preferred in typewriting courses. However, if necessary, 20 employees may attend.

Employees are encouraged to take only one course at a time. Two courses may be taken simultaneously if the employee is preparing for a particular position or is weak in certain skills. Permission must be granted by the coordinator of employee development and by the employee's division manager.

Courses. Courses that are being offered are described below, when possible, according to employee eligibility, purpose, schedule, objectives, content, and implementation. These courses include (A) beginning typewriting, (B) intermediate typewriting, (C) advanced typewriting, (D) numerical typewriting, (E) briefhand, (F) transcription, (G) secretarial procedures, (H) Friden calculator for beginners, (I) Friden calculator--advanced, (J) Marchant calculator, (K) ten-key adding machine, and (L) business arithmetic.

A. Beginning Typewriting

A typewriting course, i.e. beginning, intermediate, or advanced typewriting, is continuously in session. The

only interruption is a two-week break after the completion of beginning typewriting and before the start of intermediate typewriting.

Employees are given a five-minute timed writing test to determine which course they should take. Employees with no previous training in typewriting or with typewriting ability below 20 words per minute on a five-minute timed writing are eligible to enroll in beginning typewriting. The course is held one hour a day for nine weeks.

Beginning typewriting is designed to provide employees with a skill for eventual job advancement. Minimum goals of the course include (1) passing a five-minute timed writing at a minimum speed of 30 correct words per minute[2] with no more than five errors and (2) being able to type letters and tabulation problems.

The course covers knowledge of machine operation, development of speed and accuracy, number drills, letter set up, and tabulation. A college typewriting textbook is used for instruction. Satisfactory completion of this course permits employees to enroll in intermediate typewriting.

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[2]Correct words per minute means that one point for each error was deducted from the gross number of words typed per minute.

B. Intermediate Typewriting

Employees with limited typewriting skills and experience are eligible to take intermediate typewriting. Usually these employees have had one or two years of typewriting in high school. The course is held one hour per day for six weeks.

The purpose of this course is to prepare employees for better job performance and for eventual job advancement. Minimum goals of the course include (1) passing a five-minute timed writing at a minimum speed of 45 correct words per minute with a maximum of five errors and (2) skill in typing letters and tabulation problems. A college typewriting textbook is used for instruction. Satisfactory completion of this course permits employees to enroll in advanced typewriting.

C. Advanced Typewriting

This course is open to employees who have completed intermediate typewriting or who are currently assigned to typewriting jobs. These employees must pass a five-minute timed writing with a minimum speed of 40 correct words per minute with no more than five errors in order to qualify for enrollment. The course is given three times a week, Monday, Wednesday, and Friday, for the first eight weeks and every day during the ninth week. Each session is one hour in length.

The purpose of this course is to prepare trainees for better job performance and for job advancement. It is designed to increase speed and accuracy. Trainees try to attain the goal of typewriting the same sentence at 100 words per minute for two minutes without error.

The perceptoscope and the Strong-Pacer are used in helping to improve typewriting performance. The course is introduced with a short colored film explaining the teaching plan and correct typewriting techniques. The perceptoscope is then used in flashing sentences for a period of 20, 40, 60, or 120 seconds. The trainee types each sentence as many times as possible within the time specified. At the end of the time, the sentence flashes off the screen and the rate for determining speed flashes on the screen. During each class period, work with the perceptoscope is followed by work with the Strong-Pacer. The highest speed attained without error on a two-minute timed writing is recorded. No other tests are given.

Letter set up and tabulation techniques are reviewed during the last week of class. Daily homework assignments are given. These involve completing 15 minutes of copy work on the job in the morning and in the afternoon. A college typewriting textbook is used for review of letter and tabulation techniques and for homework assignments.

D. Numerical Typewriting

This course is open to any employee who needs to increase proficiency in number typewriting. It is given one hour per day for two weeks.

The objective of this course is to achieve the same facility with numerical and symbol keys as already achieved with letter keys. The top row of the keyboard is used exclusively. Accuracy is emphasized. A school typewriting textbook is used.

E. Briefhand

Anyone interested in rapid writing may enroll. Briefhand is held one hour per day for six weeks. The course is offered five times a year.

Briefhand writers can usually attain a speed of 80 words per minute which is considered sufficient for the average secretary's needs. Employees who might be assigned difficult or long dictation or conference work are encouraged to study Gregg shorthand at their own expense. These employees would complete a basic course in Gregg shorthand at any available institution in the evening. They then would be eligible to enroll in the company's transcription course.

The minimum goal of the briefhand course is to attain a speed of 60 words per minute for five minutes with a maximum of 5 per cent error. Some students attain speeds of 80 words per minute. A school textbook is used. Some

homework is assigned. Upon completion of this course, trainees may enroll in the transcription course.

F. Transcription

Transcription is designed for employees with a knowledge of basic shorthand forms who wish or need to improve transcription skills. The course meets one and one-half hours per day for eight weeks.

The goal of the course is to transcribe eight mailable letters dictated at 60, 80, or 100 words per minute. Letters with correct punctuation, grammar, and spelling and with no discernible errors are mailable. Letters are short, medium, and long and of average context.

Instruction covers letter set up and office style dictation dictated at various speeds. Instructors have developed their own dictation materials. No homework is assigned.

G. Secretarial Procedures

Employees must be proficient in typewriting and in some form of notetaking skill to be eligible to enroll. This course meets one hour per day for two weeks.

The course covers secretarial "know-how" such as telephone techniques, handling correspondence, travel and hotel reservations, receptionist duties, insurance terms with definitions and outlines in Gregg shorthand and in Briefhand, sources of information, and other secretarial

information. Spelling, punctuation, and English usage are also reviewed. The coordinator of employee development has developed a comprehensive secretarial manual for the course. Daily tests based on the manual are given throughout the course.

H. Friden Calculator for Beginners

Employees with no previous training or those who wish to become more proficient are eligible to enroll. The course is offered one hour per day for one week.

Fundamentals of calculator operation are covered: addition, subtraction, multiplication, multiplication of decimals, division, and division of decimals. A manual provided by the manufacturer is used for instruction. A test for certification is given at the completion of the course.

I. Friden Calculator--Advanced

This course is offered to employees who are now using the calculator and who need training in performing more intricate calculating problems. The course is designed to meet each employee's special job needs. It is offered one hour per day for one week.

J. Marchant Calculator

Employees with no previous training or those who need to become more proficient are eligible to enroll. The course is offered one hour a day for two weeks.

The course covers fundamentals and a variety of problems that can be performed on the calculator. A manufacturer's manual is used for instruction. A test is given in the middle of the course and another, at the end.

K. Ten-Key Adding Machine

Employees with no previous knowledge of this machine or those currently using this machine are eligible to enroll. This course is held one hour a day for two weeks.

The purpose of this course is to develop speed and accuracy on a ten-key adding machine. Trainees must attain a minimum speed of 250 strokes per minute in order to obtain certification as a ten-key adding machine operator.

The majority of each period is spent working with the perceptoscope. This machine is used in teaching trainees the touch method of operation and in helping them develop speed and accuracy. At the beginning of every period, two one-minute timings are given and the results are averaged. In addition, 15 or 20 minutes of each period is spent on multiplication problems and on other types of problems that are related to the company's work. This practice also helps each trainee in becoming accustomed to working with materials at her desk rather than from the screen. Instructional materials have been prepared by the employment coordinator.

L. Business Arithmetic

Any employee who needs a brush-up in business arithmetic is eligible to attend. This course is held one hour per day for six weeks. The course covers addition, subtraction, multiplication, division, percentages, fractions, and decimals. A high school textbook is used. A test is given at the completion of the course in order to determine satisfactory course performance.

Reward. Upon satisfactory completion of a course, each employee receives a certificate to indicate course requirements have been fulfilled. One division vice president provides each employee with further recognition by placing a single rose on her desk. The presence of the rose also signifies her achievement to other employees in the division.

Upon satisfactory completion of a course, employees also may be recommended for promotion and transferred to other positions by the coordinator of employee development. When an opening occurs, the coordinator of employee development sends several employees to be interviewed for the position. Unsuccessful candidates are told why they were not selected in order to help them do better in their next interview.

Evaluation. Upon completion of a course, the course instructor fills out a training report for each class member and gives the report to the coordinator of employee development. The report contains an evaluation of an employee's performance and attitudes

exhibited in class along with a record of course attendance. If a report indicates that an employee did not pass a course because of absence or poor performance, further training may be provided.

The report also provides information for each trainee's supervisor or division manager. A comment card giving an assessment of an employee's course performance as a trainee is sent to her supervisor or division manager. This device helps the supervisor become aware of an employee's skill limitations, ways she may be motivated, and her need for another course. Without this information, the supervisor may expect an employee's job performance to exceed her actual capabilities simply because she attended a course.

II. Key Punch Training

Purpose. This program prepares new employees for positions as key punch operators.

Development. A shortage of key punch operators in the employment market necessitated the company's developing its own training program for prospective operators. This program has succeeded not only in keeping the company supplied with operators but in providing the company with employees skilled in performing key punch job duties.

Trainees. New clerical employees with and without previous key punch knowledge are selected for the program. All employees selected for training must have a minimum typewriting speed of 35 correct words per minute.

Schedule. The program is conducted continuously in the key punch section of the company. Trainees meet every day for two weeks from 9 a.m. to 4:40 p.m. with an hour for lunch.

Content and Implementation. Program content is concerned with skill training in key punch job duties and procedures and with skill training in machine operation. The first part of training covers basic machine operation. The second part concentrates upon production work. Class assignments similar to those that will be completed on the job are used. These assignments consist of company work that has been completed and that can now be used for practice purposes. The program combines individual and group instruction with practice sessions.

Reward. Upon satisfactory completion of training, each trainee receives a certificate in acknowledgment and is placed in a permanent key punch position.

Evaluation. During training, the key punch supervisor evaluates each trainee on the quality of work completed. At the end of the course, the key punch supervisor completes a report evaluating each trainee's course performance and recommends or not recommends the trainee for employment as a key punch operator. The report is sent to the coordinator of employee development.

III. Training Trainers

Purpose. The program prepares clerical employees for increased job responsibilities involving on-the-job supervision.

Trainees. The program is available to all nonsupervisory clerical employees who have been employed by the company for at least six months or a year and who are recommended by their division managers for training.

Schedule. The program meets one hour a day for one week. It is offered three times a year.

Content and Implementation. The program provides skill training in techniques of how to instruct incoming and permanent employees in new clerical assignments. Prospective trainers learn how to overcome employees' fears and to gain better performance results by presenting all details of each assignment in a step-by-step process. The instructor demonstrates techniques, and prospective trainers give practice performances.

Instructional materials have been prepared by the coordinator of employee development. Upon satisfactory completion of the program, each trainee receives a certificate of acknowledgment. A report of each trainee's program performance is given to the coordinator of employee development by the program instructor.

IV. Individual Training

Clerical employees are provided with formal training tailored to their individual needs. The following programs are given: (A) special job assignments and (B) special typewriting instruction.

A. Special Job Assignments

When requested, the coordinator of employee development makes arrangements to train any clerical employee in those special skills and knowledges that are needed in executing special job assignments.

Each program is conducted as a series of daily one-hour sessions. The number of sessions is dependent upon

a trainee's background and abilities and upon the subject matter to be learned.

Program content may be concerned with skill training in job duties and procedures and/or in special skills and knowledges. The employee brings a sample of work from her department. This sample is used as a guide in developing instructional materials designed to train the employee in satisfactorily handling similar assignments.

Instruction is conducted on an individual basis. Upon completion of training, the instructor gives the coordinator of employee development a report of the trainee's program performance.

B. Special Typewriting Instruction

Typewriting instruction occasionally is offered to physically handicapped clerical employees. Training is designed to provide them with typewriting skills for use on the job.

Typewriting instruction for personal use also is given sometimes to clerical employees nearing retirement. This training is provided in an attempt to help these employees in their adjustment to retirement. This skill may enable them to occupy themselves with part-time typewriting work when employment with the company terminates.

Special typewriting instruction is conducted as a series of daily one-hour sessions. The number of sessions

is determined by each trainee's needs. Instruction is given on an individual basis. School textbooks are used for instruction. Upon completion of training, the instructor gives a report of the trainee's job performance to the coordinator of employee development.

IV. Future Training Activities

Programs are being updated continuously. Revision occurs most often in the secretarial area.

Future Workshop. A "secretaries' workshop" is in the process of being established. This activity is given to help secretaries and stenographers perform their functions more efficiently. These employees would increase their knowledge and skill ability as well as would be given an opportunity to exchange ideas and to have questions answered.

Secretarial employees have been sent a questionnaire requesting their areas of interest and their preference of meeting time. This information has been utilized in holding two sections of a one-hour trial workshop. The needs of executive secretaries were discussed in one section; the needs of stenographers, in the other one. Over 600 employees attended the workshop.

Plans are being formalized to conduct a monthly meeting for a junior secretarial group and four meetings a year for an executive secretarial group. Each meeting will be an hour in length. The coordinator of employee development will schedule the meeting time for the junior group. If many stenographers wish to attend, a

meeting will be held in the morning and another in the afternoon. The executive group will meet at a time that conveniently fits in with their job activities. This group has indicated that a desirable time is from 10 to 11 a.m.

Meetings for both groups will include group discussions and outside speakers supplemented with various kinds of instructional materials relative to their job activities. For example, the junior group needs emphasis placed upon telephone usage. The executive group needs to learn more about work organization for themselves and for their bosses.

SECTION II

CASE STUDIES OF COMPANIES WITH LESS STRUCTURED AND/OR LESS EXTENSIVE FORMAL TRAINING PROGRAMS

Section II presents case studies of 21 companies. In general, these companies conducted formal in-company training programs for clerical employees that were less structured and/or less extensive than those described in Section I. Consequently, report of each company's complete training function, including the structured elements of its formal training activities, was not feasible. In these case studies, the intent is simply to identify and describe in brief those formal in-company training programs that these companies conduct for their clerical employees and to identify tuition aid practices that they provide for these employees.

Each case is identified by the type of company and the number of clerical employees in order to provide a frame of reference in describing the nature and content of the company's formal in-company training and tuition aid practices. Cases are grouped according to type of training offered: (1) companies with orientation to company policies and procedures, (2) companies with orientation training and skill training in job duties and procedures, (3) companies with skill training in special skills and knowledges in addition to some other types of training, and (4) companies with general education training.

Cases that included more than one type of training are classified, for the most part, under the most specialized type of training offered.

For convenient reference, case studies presented in this section have been summarized in Appendix B. This digest identifies type of company; clerical employee size category; formal training activity with regard to purpose, type of training, eligible clerical employees, and program implementation; and tuition aid practices.

I. Companies with Orientation to Company Policies and Procedures

Cases AA and BB describe orientation programs designed to familiarize employees with company policies and procedures. In both cases, programs are given to new clerical employees to prepare them for work in the company. Class instruction is used in Case AA; and programmed instruction, in Case BB. In the latter company, branch office secretaries are also provided with periodic class instruction designed to keep them abreast of company information.

It should be noted that although programmed instruction used to train new employees in Case BB does not involve class instruction in the usual sense, it can be classified as a planned instructional approach. For this reason, plus its effect upon the company's training program for branch office secretaries, its inclusion here seems to be justified.

Case AA

One-Day Program of Lectures

This home office of an insurance company employing over 500 clerical employees provides formal training activities for all clerical employees. New clerical employees are provided with a one-day orientation program; and all clerical employees, with an occasional lecture and with tuition aid for out-of-company courses. In addition, permanent clerical employees will soon be offered a program in supervisory techniques.

Orientation. This program is given to prepare new clerical employees for work in the company. Lectures, planned by the personnel director, are given to provide an over-all view of the company and its activities. In the morning session, employees become acquainted with the company's history, policies, and procedures. In the afternoon session, they are given a general outline of the office function and an introduction to insurance terminology.

Lectures are conducted by the personnel director and other department members in one of the company's conference rooms. Company materials are used for instructional purposes.

Guest Lecturer. The personnel director occasionally invites a person from education or from another business organization to speak to all or to a particular group of permanent clerical employees on some job-related topic. The purpose of the lecture is to help employees improve their job performance. A lecture is usually one or two hours in length and is conducted on the company's premises during working hours.

Future Plans. Permanent clerical employees will soon be offered a program designed to train them in supervisory techniques. This program will be concerned with providing employees with new skills for better job performance as well as for job advancement.

Tuition Aid. Partial (50 per cent) tuition refund is available to all clerical employees for approved courses that are satisfactorily completed at an accredited institution. Upon employment with the company, employees are eligible to apply for tuition aid. Each course must be approved by the personnel director before course registration if an employee wishes to qualify for aid. Reimbursement is provided for only those courses that are related to an employee's present or future work in the company.

Case BB

Orientation to Company Policies and Procedures Conducted by Programmed Instruction

The home office of this statewide service organization employing over 700 clerical employees in the Boston area is experimenting with programmed instruction as a training technique. Members of the personnel department are in the process of assessing the effectiveness of this method and determining possible areas in which it might be integrated with other company training activities.

At present, formal training activities for clerical employees involve orientation to company policies and procedures for new employees and similar training for permanent secretaries to branch salesmen. When clerical employees need other training, the personnel department sends them to programs conducted by out-of-company training agencies, such as secretarial seminars provided by consulting agencies, or brings in a person who is a specialist in the subject area to instruct them. For example, a short time ago, a handwriting instructor was employed to improve the handwriting of those clerical personnel who particularly need to write legibly in executing company matters. The establishment of a tuition aid program for clerical employees is being considered.

Orientation for New Employees. The company's first experience with programmed instruction has been directed toward preparing new clerical employees for work in the company. General information about the company's products and policies has been programmed by members of its personnel staff. The main objectives of the

instruction are designed to make employees better informed and able to communicate more intelligently with customers.

The personnel staff evaluated the program's effectiveness by comparing test results of one group that was given instruction with another group that was not. The program was administered to all new clerical employees during a six-month period. Their scores on tests given upon completion of the program averaged 92 per cent. These results were compared with test scores attained by a group of long-term clerical employees that had received no programmed instruction. Their average grade was 56 per cent. The outcome of this experiment has resulted in programmed material becoming an integral part of preparing new employees for work in the company and, in the near future, being administered to all company employees.

Orientation for Branch Office Secretaries. In this company, branch salesmen are frequently away from their offices. During these periods, their secretaries must be capable of handling many of their office duties. Periodic training in current operational procedures is given to these secretaries to enable them to fill in for their bosses when away.

Members of the personnel department arrange for branch secretaries to be brought to the home office at frequent intervals for a five-day retraining period. The program is planned jointly by members of the personnel department and by the sales training director. Five or six secretaries attend at one time. Secretaries are brought up to date on production operations and procedures by the sales training director and representatives from the underwriting and

claims departments. Training is conducted by lecture, demonstration, and class practice. One of the company's conference rooms is used for training.

The successful experience with programmed instruction for orientating new employees has resulted in the personnel department's decision to program a training unit for branch sales secretaries. Programming this information will provide each secretary with identical information and with material for instant on-the-job reference.

II. Companies with Orientation Training and Skill Training in Job Duties and Procedures

Cases CC through HH describe formal training programs that combine orientation to company policies and procedures with skill training in job duties and procedures and, in certain instances, with a limited amount of skill training in special skills and knowledges. In Cases CC, DD, and EE, this training is given to prepare incoming secretaries for work in the company. Varying amounts of class instruction are combined with a rotation or understudy plan. In Cases FF, GG, and HH, all clerical employees are given periodic class instruction to increase their skill in performing present duties.

Case CC

Orientation Session Followed by Three-Month Rotation Plan

This electronics manufacturing firm of slightly over 200 clerical employees has developed a three-month rotation program for incoming secretaries and provides permanent clerical employees with a tuition aid program.

Personnel Training Program. This program is designed to help incoming secretaries perform their permanent assignments more efficiently and effectively. Secretaries are given an over-all profile of the company's systems and operations as well as an opportunity to learn the technical aspects of their secretarial duties.

The program is administered and organized by the personnel assistant. It consists of a two-hour orientation session followed by a series of on-the-job training experiences in selected departments throughout the company. The length of the program is determined by a trainee's permanent assignment. Programs usually are three months in length but may be shortened or extended accordingly.

The orientation session is conducted by the personnel assistant in one of the offices of the personnel department. This session is attended by one or several new secretaries, depending upon the number employed at one time. In this session, a description of the company's policies and procedures is presented by lecture and by demonstration techniques.

The rest of the program is tailored by the personnel assistant to fit each trainee's education, experience, and ultimate

responsibilities. Each trainee spends from two to several weeks in a department, depending upon the requirements of her permanent assignment and her capabilities. In each department, a trainee performs her temporary secretarial assignments under the direct guidance of a college-trained supervisor and the department's head. In this way, a trainee becomes familiar with the company's over-all systems and procedures and gains actual experience in various operations that will be directly or indirectly concerned with her permanent assignment and in the technicalities of the secretarial function.

Tuition Aid. Partial (75 per cent) tuition refund is available for courses completed with a minimum grade of B. Reimbursement is provided for any course that is related to an employee's present or future job with the company. Courses may be taken at any accredited institution and, when approved by the personnel department, at a nonaccredited institution. Employees are eligible to register for a course after six months of company service.

Case DD

Orientation Session Followed by Understudy Assignment

The home office of this insurance company employing nearly 1,000 clerical employees also conducts a formal training program for new secretarial employees as well as provides permanent clerical employees with tuition aid.

New Secretarial Training Program. For the past ten years, the home office of this company has been preparing new employees for secretarial positions before their services are needed by the company. Each June the staff of the personnel department selects ten graduating high school seniors for this purpose. Trainee selection is based mainly upon school achievements in secretarial courses.

The training program is administered and organized by the staff of the personnel department. Trainees are introduced to the program by attending a three-hour session. This session is conducted by members of the personnel department in one of their offices or conference rooms. In this session, a description of the company's policies and procedures, as well as an over-all picture of the training program's purposes and activities, is presented.

After this session, each trainee is assigned as an understudy to a department head secretary. Here the trainee is given simple assignments and gradually, as her competency increases, more complex ones. At the end of a year, each trainee becomes secretary to an assistant department head. In this capacity, the trainee continues

her secretarial preparation by learning how to handle various secretarial situations. When the trainee's job performance indicates she can satisfactorily perform the secretarial function, she becomes eligible for promotion to department head secretary. A trainee occasionally can qualify for this position about a year after employment if job performance is satisfactory and if a vacancy occurs.

Tuition Aid. Partial or full tuition aid is available for courses conducted at any accredited or nonaccredited institution. This company pays the first 50 per cent of tuition charges when an employee registers for a course. The second 50 per cent is paid when the course is satisfactorily completed.

Reimbursement is provided for any course that is related to an employee's present or future work with the company. Employees are eligible to register for a course after three months of company service.

Case EE

Orientation Session Followed by Understudy Assignment

The home office of this insurance company which employs more than 1,000 clerical employees also uses an understudy approach in training new secretarial employees and provides permanent clerical employees with tuition aid. The services of equipment suppliers are employed when needed.

Secretarial Training Program. This program prepares beginning employees for responsible secretarial positions. The program is designed to develop effective secretaries and to provide the company with a continuous supply of trained personnel.

Each June a new program begins. The program is administered and organized by the personnel department. The number of trainees that are selected for each program is determined by a projected estimate of future vacancies. Trainees are chosen from ten Boston high school graduating classes. Preference is given to applicants with top grades, excellent attendance records, three years of typewriting, and two years of shorthand. One or two junior college secretarial graduates are also included in each program. College trainees are expected to have a minimum shorthand speed of 100 words per minute and a minimum typewriting speed of 55 net words per minute.

The program begins immediately after high school graduation in June and continues for 6 to 12 months according to each trainee's needs. The first part of the program consists of a two-hour orientation session conducted by a staff member from the personnel

department. The session is held in one of the company's conference rooms. The company's growth, policies, correspondence manual, and insurance terms are described during the meeting.

In the second part of the program, each trainee is assigned both to a junior executive and to an experienced secretary within the same department. This position may be created especially for the trainee or may already be in existence. Daily job assignments include two hours of dictation and transcription. Dictation is given by the assigned executive. The trainee then spends the rest of each day assisting, and at the same time being trained by, the assistant secretary. The assigned secretary makes carbon copies of her work for daily discussions of various job practices and procedures with the trainee. When the trainee becomes more proficient, daily discussions become weekly ones.

Assignments for junior college trainees differ to some extent. Each of these trainees is assigned to work with a department manager and his secretary and is given more complex assignments than those given to high school trainees.

The staff of the personnel department periodically checks each trainee's progress. The executive for whom a trainee is working sends progress reports to the personnel department every three months.

Upon completion of training, a "trainee" is reclassified as a "clerk-stenographer" or a "clerk-secretary" depending upon her qualifications. She may be assigned to a position in the same department or may be transferred to another department. Opportunities

for further promotion continue; for example, four ex-trainees have advanced to executive secretarial positions.

Tuition Aid. Full-tuition aid is available for any course concerned with insurance that is satisfactorily completed at any accredited or nonaccredited institution. Employees are eligible to register for a course after 90 days of company service.

Case FF

Monthly Meetings for Better Job Performance

This insurance company holds monthly meetings for its clerical force of 80 employees as well as provides them with tuition aid. Employees are also sent to out-of-company training programs conducted by International Business Machines Corporation.

Monthly Meetings. These meetings, planned by the office manager, are given to increase permanent employees' skill and knowledge for better job performance. Employees are informed of changes in company procedures and policies and in office duties and procedures and are given retraining in these areas. Equipment demonstrations, movies, and outside speakers from various business organizations are often a part of these meetings.

Meetings are conducted by managerial personnel drawn from other departments and, occasionally, by outside speakers. Meetings are held during working hours in one of the company's conference rooms. Length of meetings varies from one to two hours.

Tuition Aid. Full tuition aid is provided for any course satisfactorily completed at any accredited or nonaccredited institution. Employees are eligible for tuition aid upon joining the company.

Case GG

Monthly Meetings for Better Job Performance

This bank also conducts meetings for its clerical force of 25 employees as well as provides them with tuition aid. The services of equipment suppliers are employed when needed.

Meetings. The treasurer plans periodic meetings that are designed to increase permanent employees' skill and knowledge for better job performance. Company policies and procedures as well as office duties and procedures are reviewed, and changes in these areas are learned.

Meetings are conducted by one of the bank's officers. Meetings vary in length from one to two hours. They are scheduled during regular working hours when needed. One of the bank's conference rooms is used.

Tuition Aid. Full tuition aid is provided for any course satisfactorily completed at the American Institute of Banking. Employees are eligible to enroll in a course after six months of company service.

Case HH

Continuous Training for Better Job Performance

This bank continuously conducts a six-week job improvement program for its clerical force of nearly 50 employees as well as provides them with tuition aid. The services of equipment suppliers are employed when needed.

Induction Program. This program, planned by the assistant treasurer, provides a means of familiarizing employees with all phases of banking procedures, with various job duties and procedures, and with customer relations techniques.

The assistant treasurer selects new and/or permanent clerical employees as program participants. All clerical employees attend periodically. Only four to six employees attend each program to insure that each class member has the opportunity to participate in discussions and to describe his or her job functions.

Each class is conducted by two bank officers. One officer presents the subject matter, and the other acts as a consultant during class discussion. Each program consists of a one- to a one-and-a-half-hour class held weekly for six weeks. Classes are held during working hours in one of the bank's conference rooms.

Tuition Aid. Full tuition aid is available for any course offered by the American Institute of Banking and, when approved by the assistant treasurer, for those courses offered by other educational institutions that are related to an employee's present or

future work with the company. Satisfactory course completion is not necessary for tuition reimbursement but is necessary in order to obtain aid for the next course.

III. Companies with Skill Training in Special Skills and Knowledges in Addition to Some Other Types of Training

Cases II through RR describe companies that conduct programs that include skill training in those special skills and knowledges that are necessary for performing particular kinds of job duties. In Cases II through OO, special skills and knowledges refer to subject areas that are industry or company related; and in Cases PP through QQ, to secretarial or machine operating skills.

Cases II through OO conduct programs that combine skill training in special skills and knowledges with orientation to company policies and procedures and with skill training in job duties and procedures. In Cases II through MM, programs prepare new tellers for work in the company; in Case NN, new telephone sales employees; and in Case OO, new sales secretaries. Varying amounts of class instruction and supervised on-the-job training are used in these programs. In Case MM, a program to improve job performance is also given to permanent employees who are in contact with the public.

Cases PP, QQ, and RR conduct programs that help new and/or permanent employees learn a new skill or improve their present ones. In Case PP, new or interested permanent employees are individually trained to work in the company as key punch operators. In addition, incoming stenographers are prepared to work in the company by being given orientation training and skill training in stenographic job duties through class instruction and stenographic pool training.

In Cases QQ and RR, new or interested permanent employees are trained to qualify as beginning comptometer operators. In addition, Case QQ provides prospective typists with brush-up training in typewriting; and Case PP provides permanent secretaries with skill training in secretarial skills for better job performance or for job advancement. Training is carried out by individual instruction or by class instruction in Case QQ and by only class instruction in Case RR.

Case II

Teller Training Program

This bank of about 200 clerical employees formally trains new clerical employees, and occasionally permanent clerical employees, for positions as tellers and provides all clerical employees with tuition aid. In general, the teller training program that is described below and those that are described in the following four cases are similar in purpose, trainee eligibility, content, and implementation. A more detailed description of a teller training program is presented in Section I, Case A.

Teller Training Program. This program trains new clerical employees for positions as tellers by combining classroom instruction with the understudy method. Occasionally interested permanent clerical employees are included as trainees in order to prepare them for advancement to teller positions. These employees are selected by the personnel officer from among those employees requesting teller training.

Teller training covers bank policies and procedures, mechanics of teller's work, and customer relations techniques. The program in this bank is planned by the personnel officer. Class instruction is conducted by this officer and, when necessary, by other bank officers; on-the-job training, by a regular teller.

This program usually lasts from three to four weeks. Trainees attend three days of formal classes held in one of the bank's conference rooms. Trainees complete the rest of the program in the

work area. Each trainee is assigned to a regular teller for on-the-job training at a teller's window.

Tuition Aid. Full-tuition aid is available for courses satisfactorily completed at the American Institute of Banking. Courses must be approved by each employee's department head before course registration if tuition aid is desired. Employees are eligible for tuition aid upon employment with the bank.

Case JJ

Teller Training Program

A similar teller training program and a tuition aid program are being carried on by this bank of 300 clerical employees.

Teller Training Program. Four days of class instruction are combined with three months of understudy training. The personnel officer plans the program and conducts class instruction. Each trainee is assigned to a regular teller for supervised on-the-job training.

Tuition Aid. Full tuition aid is available for any course that is offered by the American Institute of Banking. Employees are eligible for tuition aid upon employment with the bank. Reimbursement is not dependent upon satisfactory course completion.

Case KK

Teller Training Program

This bank of 200 clerical employees also provides a teller training program for prospective tellers and a tuition aid program for all clerical employees.

Teller Training Program. This program orients future tellers as to proper method of operation as well as trains them in customer relations techniques. Training consists of a four-week program of class instruction combined with supervised on-the-job training. The staff of the personnel department plans the program and conducts class instruction. Each trainee is assigned to a regular teller for on-the-job training.

Tuition Aid. Partial (50 per cent) tuition aid is available for any course offered by the American Institute of Banking or, when approved by the personnel department, for those courses offered by other educational institutions that are related to an employee's present or future work with the company. Employees are eligible for tuition aid upon employment with the bank. Reimbursement is not dependent upon satisfactory course completion.

Case LL

Teller Training Program

This bank of 1,000 clerical employees also formally trains its future tellers and provides all clerical employees with tuition aid. Plans are being made to add a training director to the bank's staff. The director will supervise as well as increase the present formal training activities.

Teller Training Program. A six-week teller training program is planned by the assistant vice president and personnel officer. The program combines class instruction conducted by bank officers with understudy training supervised by regular tellers.

Tuition Aid. Full tuition aid is available for only those courses in which the bank requests an employee to enroll. Courses are related to an employee's present or future work and are taken at institutions selected by the company. Employees asked to enroll in a course may be new or permanent clerical employees. Reimbursement is provided for only those courses that are satisfactorily completed.

Case MM

Teller Training and Customer Relations Programs

This bank, which also employs over 1,000 clerical employees, has just instituted a teller training program for prospective tellers and a customer relations program for permanent clerical employees. A tuition aid program is offered to all clerical employees.

Teller Training Program. Employees assigned to teller positions learn how to perform their duties by attending classes for two weeks. Trainees may be clerical employees new to the company or interested permanent clerical employees selected to prepare for job advancement to teller positions.

Classes are administered, organized, and conducted by the bank's training director in one of the bank's conference rooms. Lecture, discussion, and role-playing techniques are used in these sessions. Upon completion of class instruction, each trainee is assigned to a regular teller for additional on-the-job training. The trainee continues in this assignment until job performance is satisfactory.

Customer Relations Training Program. A series of meetings is being conducted regularly to help permanent employees improve their relations with customers. Tellers and other clerical employees with some longevity and with duties involving public contact are eligible to attend. The training director selects trainees from recommendations submitted by department managers. Maximum enrollment in each course ranges from six to eight employees.

Meetings are administered, organized, and conducted by the training director in one of the bank's conference rooms. The program is held during working hours and consists of two weekly meetings of 30 minutes each for 12 weeks. A program is conducted almost continuously in order to give as many employees as possible the opportunity to participate.

Tuition Aid. Full tuition aid is available for any course satisfactorily completed at the American Institute of Banking. Employees are eligible for tuition aid upon joining the company.

Case NN

Telephone Sales Training Program

This wholesale distribution company employing 50 clerical employees provides only new telephone sales employees with formal training. No tuition aid is provided for clerical employees.

Telephone Sales Training Program. New telephone sales employees are prepared for work in the company through class and on-the-job instruction. Preparation covers orientation to company policies and procedures, skill training in job duties and procedures, and skill training in special skills and knowledges. The sales department manager is responsible for the administration, organization, and instruction of the program.

Telephone sales employees need to know the exact technical spelling of the company's 20,000 products in order to perform their clerical duties. The rapid change of products makes it impossible to maintain an up-to-date manual for reference and for instructional purposes. Trainees are introduced to product names by being assigned orders to type and by attending periodic class meetings conducted by the department manager in one of the company's offices. These meetings also include information about company policies and job duties. Trainees are given more job responsibilities as they progress in their knowledge of product names. Training time varies from three to nine months depending upon a trainee's ability.

Case 00

One-Year Training Program for New Secretaries

This book printing and bookbinding company employing 100 clerical employees provides new secretaries assigned to company salesmen with a formal training program and all clerical employees with tuition aid.

Sales Department Secretaries. The company finds that secretaries assigned to company salesmen need extensive technical knowledge of the company's activities in order to perform their job duties. The sales department manager has satisfactorily solved this problem by having salesmen train their secretaries in company policies and procedures, in job duties and procedures, and in special skills and knowledges necessary for performing job duties.

Incoming secretaries are assigned to a training program for a one-year period. The administration and organization of the program are carried out by the sales department manager and the salesmen. Class instruction is provided by various salesmen; and supervised on-the-job training, by the salesman to whom a secretarial trainee is assigned.

Training is accomplished by a combination of plant tours, occasional class instruction held in a salesman's office, and on-the-job instruction. One or several secretaries, according to the company's employment needs, are trained at one time.

Tuition Aid. Full tuition aid is provided for any course that is related to an employee's present or future work in the company. Aid is restricted to those courses offered by Boston University.

Reimbursement is not dependent upon satisfactory course completion, but an employee is not eligible for aid until his or her job performance shows that aid is deserved.

Case PP

Stenographic Pool Training;
Key Punch Training Program

Companies have developed various planned on-the-job training programs for clerical employees. This manufacturing company of nearly 500 clerical employees trains its stenographic employees through membership in a stenographic pool and trains its key punch operators by the understudy method. The services of equipment suppliers are employed when needed. Secretaries are sent annually to secretarial seminars conducted by consulting agencies. Tuition aid is offered to all clerical employees. All of these training activities are suggested and/or approved by the company's personnel manager.

Stenographers' Pool. Employees hired as prospective stenographers are assigned to the company's stenographic pool in order to prepare for permanent stenographic positions. Two experienced secretaries are in charge of the stenographic pool and are responsible for training newly employed stenographers. They provide training that is designed to help employees adjust more easily to their environment and to perform more efficiently when permanently assigned. Trainees are oriented to the company's policies and procedures and are trained in stenographic duties and procedures.

Trainees are provided with an office manual, with occasional class instruction, and with supervised on-the-job training. Class instruction includes an overview of the company and its activities and information about job duties. Classes are held in one of the

company's offices. On-the-job training begins with simple assignments and gradually advances to more complex ones. Trainees are very closely supervised and are rated every three months by the pool's supervisors.

Length of training is dependent upon the trainee's shorthand, transcription, and typewriting abilities and previous experience and thus can vary from several months to two years. As soon as a trainee can perform stenographic duties satisfactorily, she is classified as a stenographer and transferred to another department when an opening occurs.

Key Punch Training. Faced with a shortage of operators and inadequate training given by key punch schools, this company has begun to train its own operators. The personnel manager selects new or interested permanent employees with or without previous key punch knowledge for training. All trainees are required to have some typewriting skill.

Each trainee is assigned to an experienced operator for training. This operator provides the assigned trainee with skill training in the mechanics of key punch operation as well as in those job duties and procedures necessary for performing as a key punch operator. The experienced operator supervises the trainee until completely trained. Usually a trainee is sufficiently skilled to qualify for a permanent assignment within three months.

Tuition Aid. Full tuition aid is provided for all courses related to present or future work in the company that are offered by any accredited or nonaccredited institution. Employees are eligible to enroll in a course for tuition aid after six months of company service. Satisfactory course completion is not necessary for reimbursement but is necessary in order to obtain aid for the next course.

Case QQ

Skill Training Courses

A temporary employment agency employing nearly 500 permanent and temporary clerical employees offers continuous brush-up training or training in a new skill to its applicants and to any interested employees. No tuition aid is provided for clerical employees.

Skill Training Program. Training is given to prepare applicants and any interested employees for work in a company or for job advancement. The office manager administers and organizes training to help those with some typewriting knowledge and those with or without previous comptometer knowledge pass a series of qualifying skill tests or improve their previous test ratings. Test results provide a basis for determining which temporary positions employees may qualify. These positions may be with companies requesting temporary personnel or may involve completing job assignments on the agency's premises.

Individual typewriting and comptometer instruction as well as facilities for practicing these skills are provided. Trainees attend during the day on their own time. Training ranges from one day to a month depending on the trainee's previous training and ability to learn. Instruction, when needed, is given by the agency's permanent office employees who are skilled in operating these machines. A classroom with 60 comptometers and another with 20 typewriters are available for practice any time during the day.

Comptometer Training. Twice a year, in May and November, companies are in great need of comptometer operators. A month before each of the busy seasons, special comptometer classes are held in order to provide a supply of operators to meet the oncoming demand. Classes are held two evenings a week from 8 to 10 p.m. The same facilities that are available for training during the day are used.

Classes are open to any person interested in working as a comptometer operator or interested in improving their present test ratings for a better position. Training is conducted on an individual basis by two of the agency's permanent office employees. Individual instruction is necessary in meeting the trainees' varying backgrounds.

Case RR

Skill Courses Conducted by Local Business Teacher

This manufacturing company provides its 450 clerical employees with skill courses and with tuition aid. Local business teachers are employed to conduct skill courses for clerical employees on the company's premises during working hours. The company originally had its own vestibule school but finds that the present arrangement is more satisfactory for formal training offered on an intermittent basis. All formal training activities for clerical employees are administered and organized by the accounting manager.

Comptometer Training. Courses in comptometer operation for unskilled operators are offered frequently. Shortages of skilled operators make it necessary for the company to train its own employees. The accounting manager selects new or interested permanent employees for comptometer training. This training is designed to equip them with skills required to qualify for beginning comptometer positions.

Instructors from a local comptometer school are employed to conduct these courses. Each course is conducted all day for as many days as is necessary. The length of a course varies with the needs of each group. Machines from the company's working area or from a rental agency are placed in a general training room or a conference room.

Each course covers the principles of machine operation. Instructional methods include lecture, machine demonstration, and machine practice.

Secretarial Brush-up Course. Secretarial skill courses, primarily in typewriting and in shorthand dictation and transcription, are given whenever a large number of stenographers and secretaries can benefit from such training. These courses are given to help permanent employees improve their present job performance and at the same time to help prepare them for eventual job advancement. Employees are recommended for training by department managers and are required to attend.

Instructors are drawn from the faculty of one of the leading secretarial schools in Boston. Length of course is dependent upon the group's needs. Courses are held in one of the company's general training rooms. Typewriters, when needed, are rented and placed in the training room.

Tuition Aid. Partial tuition aid is provided for courses related to present or to future work in the company. Courses must be completed at an accredited institution. Amount of aid is based on the final grade received. A refund of 75 per cent is granted for a grade of A or B; 50 per cent, for a grade of C; and nothing, for a grade below C. Employees are eligible for tuition aid upon joining the company.

IV. Companies with General Education Training

Cases SS, TT, and UU describe companies that provide clerical employees with general education courses. These courses may or may not contribute directly to clerical employees' present or future job performance.

In Case SS, secretaries are provided with a course in speed reading to help improve their job performance. This company had been also conducting a secretarial skills training program to prepare clerical employees for job advancement, but economic conditions have necessitated temporary cessation of the program.

In Cases TT and UU, general education courses are offered to all clerical employees. Courses are given mainly to broaden their general educational background. Case TT also supplements this program with a tuition aid plan for specialized courses that will improve job performance or prepare for job advancement.

Case SS

Skill Training Courses; Speed Reading Course

This electronics company consists of several divisions. Each division operates as a self-contained unit that is responsible only to the president and the executive vice president of the company. Only one of the divisions located in the area has developed any type of in-company formal training activity for its clerical employees. All divisions provide clerical employees with tuition aid.

The manager of industrial training of the division providing clerical employees with formal training has developed a skills training program and a speed reading course for these employees. These programs are described below.

Skills Training Program. This division, which employs over 1,000 clerical employees, began a skills training program in 1957 to help alleviate the existing shortage of stenographers and secretaries. This shortage was intensified by the division's expansion and by its location in an area that was concentrated heavily with firms needing secretarial employees. The manager of industrial training of the division, who is responsible for the administration and organization of all training activities for clerical employees, designed this program to help employees qualify for promotion to secretarial positions. The program was offered to interested new and permanent clerical employees with or without previous secretarial training.

Shorthand and typewriting courses were offered on company premises in the evenings from six to eight or from six to nine.

The possibility of advancement within the company motivated employees to attend school at night. Class size varied from 25 to 50 employees. Executive secretaries and business education teachers were employed as instructors. Classes were held in general training rooms. Typewriters were borrowed from departments with spare machines. The main cost of the program was instructors' salaries.

In 1962, a severe economic setback within the industry necessitated the company instituting economy measures and, as a result, temporarily sacrificing all training activities. Reinstatement of the skills training program is dependent upon changes occurring in the company's economic situation.

Speed Reading. At present, this division offers a ten-week course in speed reading to interested secretaries with some company longevity. The course is designed to help trainees improve job performance by increasing reading speed and comprehension.

The course is conducted by a member of the personnel department. It meets one evening each week for two hours. The first 30 minutes of the course is given on company time to encourage secretaries to attend. Classes are held in one of the company's training rooms. One of the other divisions is considering the possibility of offering a similar course to its secretaries.

Tuition Aid. Up to $150 of tuition aid is available each semester for any course that is satisfactorily completed at an accredited institution. Reimbursement is provided for only those courses that are related to an employee's present or future work in the company. Employees are eligible for tuition aid upon joining the company.

Case TT

General Education Courses

This manufacturing company provides its 500 clerical employees with an education program consisting of two parts: (1) the general course and (2) tuition refund plan. Soon to be conducted on employee time is a secretarial development program for all interested female employees. The program is to provide skill training in secretarial skills for better job performance and for job advancement.

The General Course. This program is designed to provide a fresh educational start for any interested employee who is a high school or nonhigh school graduate as well as to increase the general educational background of an employee. It consists of a group of courses in English, mathematics, and science. Each subject is given in four levels of difficulty. Each level is composed of two 20-week semesters.

The program is administered and organized by the company's education and training department. Courses are taught by instructors selected from management or from outside the company. These instructors are required to possess a master's degree and teaching experience. Instructors are responsible for implementing course objectives that have been established by the education and training department. Upon course completion, instructors subjectively evaluate each of their respective course enrollees in a written report that is submitted to the education and training department.

All employees are eligible to enroll; no waiting period is required for incoming employees. An employee who has not recently participated in some academic program often begins with first-level courses. An effort is made to help each employee avoid repeating known subjects as well as to help each one select those courses needed for high school credit. Upon course completion, an employee may obtain high school credit by satisfactorily passing an examination. The company is permitted to grant high school credit through an arrangement that has been negotiated between the education and training department and the Massachusetts Department of Education.

Subject matter determines whether a particular course is to be held as a one-and-one-half-hour or two-hour session, whether it is to be given two, three, or four times a week, and whether it is to extend over a ten-, twenty-, or forty-week period. Ten-week courses that are offered during each 20-week semester are scheduled to permit an employee to enroll in a course of this length at the beginning and/or at the middle of the semester.

Courses usually are scheduled in the afternoon. Employees attend before or after work depending upon the hours of their work shift. Average class size is between 15 to 20 employees. Company classrooms are used.

Program expenses are paid by the company. The main cost is instructors' salaries. Employees are required to purchase only their textbooks.

Courses that are of especial interest to clerical employees include the following: reading-study skills, advanced reading,

English grammar, intermediate English, English composition, business English, effective writing, introduction to mathematics, and introduction to chemistry. More advanced mathematics and science courses are offered, but these courses usually are designed for employees in other categories.

Tuition Refund Plan. A tuition refund plan for specialized courses is provided in conjunction with the aforementioned general education program. The tuition plan enables employees to take specialized courses at approved educational institutions in the Boston area. It applies to courses that help employees improve present job performance or prepare for job advancement.

Employees who have been with the company for one year are eligible to receive a maximum of $200 for tuition expense each semester. New employees also are eligible for tuition reimbursement but their refunds are made retroactively, i.e. upon completion of a full year of service with the company. Reimbursement is given for those courses that have been approved before enrollment by the employee's department head and that have been completed satisfactorily. Satisfactory course completion is also required in order to obtain aid for the next course.

Case UU

General Interest Courses

This utility company of 75 clerical employees conducts general interest courses for these employees as well as offers them tuition aid.

General Interest Courses. These courses are given primarily to increase employees' general educational background. Courses are planned by the personnel department. Subjects offered vary according to expressed and implied interests of employees. Qualified company employees at the managerial level are paid to teach these courses. Both new and permanent employees are eligible to attend any of the courses. Courses that clerical employees attend are elementary electricity, accounting, and first aid. Other courses of interest to clerical employees may be added to the course offerings in the future.

Courses usually meet for two-hour periods once or twice a week for ten weeks. Classes are conducted in one of the company's conference rooms. Employees attend without charge.

Tuition Aid. Partial (50 per cent) tuition aid is provided for courses satisfactorily completed at any accredited or nonaccredited institution. Reimbursement is provided only for those courses that are related to an employee's present or future work in the company. Employees are eligible for tuition aid after one year of continuous employment with the company.

SECTION III

CASE STUDIES OF OUT-OF-COMPANY AGENCIES OFFERING FORMAL TRAINING FOR CLERICAL EMPLOYEES

This study identified 12 out-of-company agencies that were providing formal training activities for clerical employees. Each agency was visited, with the exception of one agency that was contacted by telephone and by direct correspondence, and analyzed according to common elements.

Each case study below describes an out-of-company agency in terms of its function(s) and training activities being offered and/or planned for clerical employees. Cases are grouped by types of organizations: (1) chambers of commerce, (2) consulting organizations, (3) equipment suppliers, and (4) trade associations.

These cases are summarized in Appendix C. This digest identifies each outside agency, those companies whose employees are eligible to participate, and the various training activities being offered or planned with regard to type, clerical classification of eligible employees, and program implementation.

I. Chambers of Commerce

Some questionnaire respondents reported sending their office personnel to an annual seminar sponsored by two local chambers of commerce. A chamber of commerce is defined as:

> A local, state, national or international association of businessmen and professional men and organizations, formed for the purpose of protecting and promoting the interests of the business community, and of the areas, regions, or trades in which they are organized . . . .[1]

The training activity that these two outside agencies provide is described here.

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[1]Donald T. Clark and Bert A. Gottfried, Dictionary of Business and Finance (New York: Thomas Y. Crowell Company, 1957), pp. 69-70.

Case AAA

Newton and Waltham Chambers of Commerce[2]

The chambers of commerce of two cities outside of Boston jointly sponsor an annual one-day seminar for suburban office women. This seminar is a self-improvement workshop designed to fulfill the needs of female office employees from both small and large firms.

Development. In 1957, the Newton Chamber of Commerce began sponsoring an annual seminar. In 1963, the Waltham Chamber of Commerce became a co-sponsor. The program is planned by personnel managers from companies located in the vicinity. Sessions are conducted by representatives from industry and education.

Participants. Female office employees from firms in the area are eligible to attend. The two chambers of commerce announced the 1963 seminar by sending a letter and a program to firms in the area, by newspaper write ups, and by their usual news channels. The committee of personnel managers also contacted these companies by telephone in order to inform and remind them about the seminar. Over 300 women office employees enrolled in the 1963 seminar. These participants represented 50 companies with as many as 40 participants representing one company.

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[2]Information furnished through the courtesy of Theodore L. Manning, Executive Vice President, Waltham Area Chamber of Commerce, Waltham, Massachusetts.

Schedule and Physical Facilities. The seminar is held for two successive days in the fall, from 8:30 a.m. to 4:00 p.m. Half of the participants attend the first day; and the remainder, the second day. This plan makes it possible to accommodate all employees in the selected facilities and enables employers to send only part of their office personnel at one time in order to minimize disruption of office operations. The seminar is held in the conference rooms of a local restaurant.

Cost. A seminar fee is charged each participant to cover cost of luncheon, refreshments, and a seminar kit. A $7 fee was charged for the 1963 seminar. This fee is paid by each participant's company.

Content. Although the seminar programs vary to some extent, the basic plan includes four sessions covering the following areas: communications, office skills, office appearance, and human relations. In the 1963 program these topics were presented as follows:

Communications. A representative from the New England Telephone and Telegraph Company discussed telephone skills, techniques, and courtesies.

Office Skills. The head of a secretarial department from a junior college discussed aids and shortcuts in typewriting, spelling, punctuation, and dictation.

Office Appearance. A representative from a cosmetic firm talked about enhancing charm.

Human Relations. A panel of four executives from large companies located in the area discussed "How to Succeed in Business--by really trying."

These activities were scheduled as follows:

8:30 - 9:15 a.m.	Registration
9:15 - 10:45	Communications
10:45 - 12:00	Office Skills
12:00 - 1:15 p.m.	Luncheon and Welcome by city and chamber officials
1:15 - 2:15	Office Appearance
2:15 - 3:45	Human Relations
3:45 - 4:00	Program Evaluation and Presentation of Certificate

Instructional Methods and Materials. Each session consists of a lecture followed by a question-and-answer period. Participants receive a seminar kit containing brochures from office equipment manufacturers.

Reward. A certificate is given to each participant as recognition of her attendance at the seminar and of the time and effort that she has devoted to self-improvement for her personal benefit as well as that of her company.

Evaluation. Participants complete an evaluation questionnaire at the close of each seminar. For example, the following questions were asked about the 1963 seminar:

1. Rate each of the five sessions for content, application to your work, and presentation according to excellent, good, fair, and other: telephone, office skills, lunch, charm, and panel.

2. How could the seminar be improved?

3. What subjects might be covered in future seminars?

4. Should there be a 1964 seminar?

Participants mentioned the following ways for improving the 1963 seminar: correct air conditioning and audio, include a female representative on panel composed of executives, schedule shorter speeches and longer question-and-answer periods, devote more time to office skills, include a midafternoon coffee break, invite department heads to attend, schedule a short break between sessions, include less discussion on basic skills, de-emphasize the secretary angle, and allow more time for participants' questions.

Participants suggested the following subjects for future seminars: proper dress, job opportunities available to women, courses available to women, customer relations, more information on banking, and employee relations in office.

Future Plans. The chambers of commerce plan to continue co-sponsoring an annual seminar. A committee composed of 13 personnel managers from companies in the area has been placed in charge of the 1964 seminar. They are formulating plans by reviewing program experiences of prior years and especially by evaluating questionnaires that were submitted by office women attending the 1963 seminar.

II. Consulting Organizations

Some questionnaire respondents reported utilizing or planning to utilize outside agencies that may be classified as professional consulting organizations in helping to train their office personnel. Investigation showed that these agencies tailor training activities to the needs of an individual company and/or a particular classification of employees. Training activities provided by the following agencies are described below: Katharine Gibbs Consulting Service; Industrial Education Institute; Mary Markulin, Training Consultant; and Northeastern University, Bureau of Business and Industrial Training.

Case BBB

Katharine Gibbs Consulting Service[3]

In 1959, the Katharine Gibbs School established a professional consulting service to assist companies in developing better trained office personnel and more efficient office procedures. Training and development activities were offered primarily in areas in which a Katharine Gibbs School was located, including Boston, and periodically in major cities throughout the United States.

In August 1963, this service was terminated by the Katharine Gibbs School. In New York City, it was continued by being incorporated into the Office of Special Services to Business and Industry at New York University. The University in the process of providing companies with educational services for their executives and professional personnel found that companies desired similar services for their office personnel. Inclusion of the consulting service made it now possible for the University to offer assistance in the continuing development of office personnel.

Although this service is no longer being offered in the Boston area, it is described here because it was reported by responding companies and indicates the type of training industry needs and desires.

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[3]Information furnished through the courtesy of Mrs. Edith Krag, formerly Director of the Katharine Gibbs Consulting Service, now Program Director of Office Training Services, Office of Special Services to Business and Industry, New York University, New York, New York.

Responsibility. The director of the consulting service was responsible for the over-all development and administration of consulting assignments. Faculty members from the various Gibbs Schools executed assignments by following plans established by the director. The service tried in all instances to use faculty from the school in the particular area where the program was being conducted.

Schedule, Physical Facilities, and Cost. Programs were conducted during or after working hours on the premises of companies, hotels, or at the Gibbs School, depending upon the kind of session and the size of the group. Fees varied directly with the extent of the services provided.

Programs. Consulting assignments involved (1) training activities geared to the needs of an individual company and (2) training programs for general registration tailored to the interests of particular office personnel groups. The content and implementation of these assignments are described below.

I. Individual Companies

Companies were provided with assistance on an individual basis in the following areas: recruitment and selection, testing, orientation and training, job analysis and evaluation, operational procedures, communications, and personnel development. Assignments in these areas involved:

1. Studying and analyzing a company's office services and making recommendations for improvement.

2. Giving professional counsel regarding office methods to increase staff efficiency and insure greater profit for management.

3. Offering suggestions to executives to help them make more productive and economic use of their supporting staffs.

4. Training office personnel to attain better office skills, especially in shorthand, typewriting, transcription, English, and orientation to company forms and procedures.

These assignments were carried out by consulting with company executives, observing office procedures and the supporting staff at work, and interpreting findings obtained from surveys, studies, questionnaires, group discussions, and seminars.

II. General Registration

Training programs that were offered annually to various groups of office employees from different firms are described below. These programs varied in length from two hours to two days.

A. Executive Seminars

Employees learned how to use a secretary effectively, how to handle dictation, and how to write effective letters, reports, and minutes.

B. Preparation of Manuals

New employees were oriented to procedures and formats being used by specific companies.

C. Refresher Programs

Skill improvement programs were provided for secretaries and stenographers in dictation, transcription, typewriting, English, and filing.

D. Secretarial Seminars

Topics discussed included the development of promotional potential by focusing upon attitudes and attributes of an effective secretary, written and oral communications, business ethics and etiquette, and dress and grooming.

E. Seminars for Supervisors

The program was designed for supervisors of secretarial, stenographic, and typewriting staffs. Topics discussed were supervisory practices, development of leadership skills and the attributes of a supervisor, administration of skills, tests and evaluation of results, and current stenographic techniques and practices.

F. Two-Day Secretarial Workshops

Topics discussed included attributes of a top-flight secretary, human relations, communications, and up-to-the-minute secretarial aids.

Two-day secretarial workshops were also held for secretarial employees of an individual company when requested by its management.

Instructional methods and materials were selected carefully to fit the intensity and shortness of the training period and the needs of each group. Instructional materials included those prepared by the consulting service as well as published materials. Upon completion of training, a certificate of attendance and/or achievement was awarded.

Case CCC

Industrial Education Institute[4]

The Industrial Education Institute provides management and operating personnel with a complete range of informational programs. The Institute, established in 1957, is international in scope with headquarters in Boston.

The Institute offers lecture seminars, skill training workshops, round table conferences, in-plant programs, extension center groups, audio-visual aids, and publications in the following areas: administration, engineering, finance, manufacturing, marketing, personnel, purchasing, and research and development. Each month more than 125 training programs are conducted throughout the United States, Canada, and Europe.

Responsibility. The Institute maintains no permanent staff for instructional purposes. Programs are developed and conducted on a local basis by recognized authorities in the various subject areas. About 80 per cent of its instructional staff are recruited directly from industry; the rest, from government, consulting firms, or educational institutions.

Participants. More than 100,000 managerial and operating employees from over 25,000 companies and government agencies have participated in the Institute's programs, as of September 1964.

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[4]Information furnished through the courtesy of Walter J. Cahners, President, Industrial Education Institute, Boston, Massachusetts.

Of the 500 largest corporations in the United States, over 400 have taken part in the Institute's programs.

Physical Facilities. Company or hotel conference facilities are used for meetings.

Cost. A fee is charged each employee participating in a program or each company requesting a program. This fee covers all program expenses.

Programs and Other Activities. Continuous study of company needs determine program topics to be selected and developed. Programs are previewed and evaluated to insure optimum effectiveness before being scheduled for presentation.

Future Nonsupervisory Office Program. Until now the Institute's programs for office personnel have been designed for only managerial employees. Its first program for nonsupervisory office employees is in the process of being developed. Company stenographers and secretaries are to be trained for technical secretarial positions.

The program will be designed either to train secretaries for technical secretarial work or to train their instructors. It will be conducted by an experienced technical secretary and her boss on the requesting company's premises.

The program's objectives and their implementation are being developed by the Institute's staff with the aid of personnel from secretarial schools, government agencies, and businesses. Instructional materials will include study kits, programmed materials, and

textbooks. Upon completion of training, a certificate of achievement will be awarded. Before the program is offered to companies, a pilot study will be conducted to determine whether or not any changes are needed to increase the program's effectiveness.

CASE DDD

Mary Markulin, Training Consultant[5]

Miss Markulin, a secretarial training specialist, sponsors (1) an advanced secretarial training conference in major cities throughout the United States, Canada, and Mexico and (2) in-plant secretarial training institutes for individual companies and government agencies. For the past nine years, Miss Markulin had been conducting these activities as director of the secretarial and office training divisions of the Bureau of Business Practice and National Foremen's Institute of New London, Connecticut.

I. Advanced Secretarial Training Conference

This conference deals with the very latest techniques, problems, and resolutions facing secretaries today. Over 30,000 secretaries from major companies and government agencies have participated in these programs.

Responsibility. Miss Markulin has been responsible for developing, administering, and conducting this conference. Occasionally she is assisted by one or two other secretarial instructors.

Prior to establishing this program, Miss Markulin worked for a number of years as an executive secretary. She has also had experience in the training field as office manager, supervisor, and coordinator and training supervisor of secretarial office practices in several large companies.

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[5]Information furnished through the courtesy of Mary Markulin, Training Consultant, New Fairfield, Connecticut.

Participants. A few weeks before a conference is to be presented in Boston, or in any city, executives of many firms in the selected area are sent notifications. They are invited to register their women office personnel. Participants are potential secretaries, executive secretaries, office supervisors, and employment and public relations personnel. Each conference is limited to 40 participants.

Schedule and Physical Facilities. Each conference is held for two days from 8:45 a.m. to 5:30 p.m. In Boston, it usually is offered twice a year and is held in one of the conference rooms of a large hotel.

Cost. A company is charged a $60 fee for each participating employee. This fee includes the costs of two luncheons, coffee breaks, training manuals, and all other conference materials.

Objectives. The conference is designed to help participants meet today's challenges to the professional secretary. It is given (1) to help secretaries develop new ideas and make major contributions to their companies and (2) to provide secretaries with solid and practical approaches to the solution of many office problems, such as how to take on supervisory interest in office operations, how to maintain good personal and public relations, how to be the pleasant personality of your business, and how to develop initiative and leadership qualities.

Content. Secretarial duties, responsibilities, problems, and techniques are covered. Other topics discussed include human

relations, work organization, personal appearance, methods to improve knowledge and skills, and application of letter writing principles.

Instructional Methods and Materials. Lecture and discussion techniques are used. Each participant receives a training manual developed by the training consultant which outlines conference topics plus several booklets on subjects of interest to a secretary. Upon completion of training, each participant receives a certificate of attendance.

II. In-Plant Secretarial Training Institutes

Special in-plant training programs are also conducted. These programs are tailored to meet the needs of a particular company. They have been conducted for many major companies and government agencies throughout the United States including several in the Boston area. Other consulting services performed for these companies involve need analyses, surveys, and evaluations of work procedures.

Case EEE

Northeastern University, Bureau of Business and Industrial Training[6]

The Center for Continuing Education at Northeastern University offers to assist companies with their training needs for secretarial and other clerical personnel through its Bureau of Business and Industrial Training. Services are designed to assist companies with the continuing development of their office personnel. The Bureau's staff works with companies on an individual basis serving in various capacities ranging from advisory to director of the training function. The Bureau's fee varies with the extent of services rendered.

General Training Procedures. The Bureau's staff recommends and develops company training activities. Research is undertaken to determine training needs. These needs are translated into training goals which are implemented with training activities.

Before developing a training program, the staff requests the support of the company's top executives. Their backing is necessary for the program's successful outcome. Training sessions are conducted by the Bureau's staff, subject-matter specialists, or company personnel. Instructional materials are designed specifically for each activity. They are developed jointly by eliciting the opinions of

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[6]Information furnished through the courtesy of Dean Albert E. Everett, Center for Continuing Education, Northeastern University, Boston, Massachusetts.

those participating in the training activity. Certificates of attendance and/or achievement are usually awarded upon completion of training.

Programs Provided. During the past year, training programs for secretaries and other clerical employees have been developed for two companies. The Bureau's staff finds that secretaries need more training in English fundamentals and in letter writing. Clerical employees promoted to secretarial positions need training in secretarial procedures and in telephone usage.

III. Equipment Suppliers

Investigation showed that most of the reported outside agencies that manufacture and/or supply office equipment provide their customers' clerical employees with only a limited amount of training. This training essentially consists of a brief explanation on how to operate a machine. A sales representative usually conducts individual instruction or a group demonstration.

The following two companies were found to be providing their customers' clerical employees with formal training programs: International Business Machines Corporation and New England Telephone and Telegraph Company. The training activities of these companies are described below.

Case FFF

International Business Machines Corporation

Data Processing Division[7]

The Data Processing Division of International Business Machines Corporation in Boston sponsors free training programs for their customers' employees. This Division provides IBM customers with instruction designed to acquaint customer personnel with the use and application of IBM machines. Courses are offered at IBM's Boston Education Center or customers are assisted in developing their own company programs.

Responsibility. Courses are developed by a corporate group called Education Development, located in Poughkeepsie and Endicott, New York, and San Jose, California. This group develops both lecture and programmed instruction courses. When necessary, courses are changed on the local level to fit particular circumstances.

The instruction group at the Boston Education Center is composed of full-time instructors as well as part-time ones drawn from the company's field marketing force. Instructors are knowledgeable both in punched card equipment and in computers and possess a desire to teach. Many instructors have had previous high school or college-level teaching experience, although this is not a fixed requirement. Upon employment as company instructors, they are given special

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[7]Information furnished through the courtesy of George E. Murphy, Instruction Manager, Data Processing Division, International Business Machines Corporation, Boston, Massachusetts.

training by the Education Development group. They attend courses designed to perfect their teaching abilities. These courses are concerned with such areas as teaching methods and the use of visual aids. Instructors also participate along with salesmen and systems engineers in IBM marketing training courses.

Trainees. Course participants are customers' personnel. Aptitude tests are available to customers for pre-enrollment screening in card punch operation, basic punch card principles, wiring courses, and programming courses. Course prerequisites have also been established to help customers derive the most benefit from the time their employees spend at the Education Center to insure that students attending each course have uniform background. Examinations are given the first day in most courses to determine successful completion of course prerequisites. Prerequisites vary with the course. A minimum typewriting speed of 35 to 40 words per minute and a satisfactory grade on a card punch operator's aptitude examination are required for enrollment in card punch classes. Satisfactory performance on a machine operator's aptitude test is required for enrollment in basic punch card data processing. This course is a prerequisite for other courses in punched card operations. Enrollment in wiring courses requires satisfactory performance on a basic punch card principles test or satisfactory completion of a basic punch card course. Enrollment in programming courses require satisfactory performance on a programmer's aptitude test and/or a basic computer systems course or equivalent experience.

Class enrollment ranges between 17 to 22 trainees. In this type of education, instructors have been found to be most effective with classes of this size. Enrollment in programmed instruction courses is on an individual basis.

Schedule. Courses conducted by instructors are offered according to customer demand, usually from one time to six times a year. They vary in length from 2 1/2 days to 15 days in duration. Each day contains six hours of class instruction.

Courses conducted by programmed instruction are arranged on an individual basis. These courses provide IBM customers with flexibility in scheduling their data processing personnel. Length of these courses is dependent upon each individual's rate of learning and the subjects involved.

Physical Facilities. Courses conducted by instructors are held in the Education Center's classrooms. Programmed instruction courses are conducted at a place designated by each trainee.

Cost. These courses are offered free of charge to customer personnel.

Courses. Nonsupervisory office employees are provided with training in key punch operation, accounting machine operation, and programming. Courses are designed for specific data processing systems. Included are such courses as card punch, basic punched card data, sorter operation, collator operation and wiring, accounting machines operating and wiring, reproducing punch operation and wiring, interpreter operation and wiring, alphabetic interpreter

operation and wiring, calculating punch, electronic calculating punch, collator, card proving machine, and basic programming.

Content. The type of material presented in the various unit record equipment courses is illustrated by the following course write up for IBM Basic Punched Card Data Processing:

> Prerequisite. Satisfactory grade on the machine operator's aptitude test.
>
> Description. This is an introductory course covering machine operation and basic control panel wiring. In addition to practice in the operation of machines, students will wire problems on the principles common to most IBM machines, such as wiring to print, wiring to punch, counter operation, comparing, selecting, etc. No attempt is made to cover a machine in its entirety. Machines covered will be 024, 026, 083, 548, 085, 519, and 407.

The type of material presented in computer courses for clerical employees is illustrated by the following course write up for 6400 Operator's Course:

> Prerequisite. Typewriting speed of at least 35 to 40 words per minute.
>
> Description. This course consists of demonstrations and actual machine operation of the 6400. The student will become familiar with the documentation on set up and operation and will practice following the instructions given. Includes the punched card input and/or output if necessary.

Instructional Methods. Courses conducted by class instruction include lectures, class problems, and machine practice. Some courses are also conducted by programmed instruction texts. Students in these courses may consult with an individually assigned instructor at the Education Center should they have any difficulties with the materials.

In basic programming courses that are conducted by programmed instruction, satisfactory examination performance entitles trainees to attend a five-day conclusion course at the Education Center. This course consists of lectures and case studies.

Instructional Materials. The Education Development group prepares class materials as well as programmed instruction texts.

Evaluation and Reward. Successful completion of courses conducted by class meetings or by programmed instruction is determined by a final examination. A grade below 70 per cent is considered failing. Upon satisfactory course completion, a certificate with the trainee's grade is sent to his or her company. In addition, the trainee becomes eligible to enroll in more advanced courses.

Case GGG

International Business Machines Corporation

Office Products Division[8]

The Office Products Division of International Business Machines Corporation in Boston offers without charge professional assistance to companies, business groups, and schools. Its educational services are designed to help customers' personnel use IBM machines efficiently, to improve business skills in general, and to increase commercial and school sales of typewriters and dictating equipment. Training activities provided for clerical employees include proficiency programs, machine demonstrations, and individual instruction. An art of dictation program and a report writing program are also given to executives who in turn help clerical employees function more efficiently.

Responsibility. Training activities are developed at IBM's New York City headquarters. Educational services representatives assigned to the Boston Division conduct training activities on a full-time basis.

Representatives are usually former business education teachers. They begin employment in this Division by attending a four-week orientation program at IBM in New York City. This is followed by on-the-job training conducted by experienced Boston educational

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[8]Information furnished through the courtesy of Patricia Ann Getch, Educational Services Representative, Office Products Division, International Business Machines Corporation, Boston, Massachusetts.

services representatives. Throughout their employment as representatives, they may also participate in any of the programs conducted in Boston by district educational services representatives that would be of value in their work.

Schedule. Programs are offered when requested by any company or organizational group. They vary in length from one to three hours.

Physical Facilities. Programs are conducted most often on the requesting company's premises and, occasionally, on IBM's.

Participants. These programs are offered to typists, stenographers, and secretaries. Classes vary in size up to a maximum of 35.

Cost. Programs are financed by IBM. Expense to customers involves the cost of their employees' time while participating and not performing their office functions.

Programs. The Division provides its customers' clerical personnel with the following educational services: (1) typewriter proficiency program, (2) secretarial transcribing proficiency program, (3) executive typewriter program, (4) demonstration of multiproduct line, and (5) individual operator instruction. Instructional techniques include lecture, discussion, machine demonstration, and machine practice. Participants who attend programs that include machine practice receive certificates upon the completion of the session. Each of these services is described below according to participants, length of session, objectives, and content.

I. Typewriter Proficiency Program

This program provides those using typewriters with a better understanding of the function and application of typewriters in general. Participants are new or experienced users of electric typewriters as well as those using a typewriter of any make or model as a major job of employment.

The program with a practice period is presented in a three-hour session. A condensed version of the program with no practice period is given in a one-hour session.

The program is designed (1) to upgrade typewriting skills, (2) to provide easier and faster methods of typewriting cards, envelopes, and carbon copies, and (3) to increase general knowledge of the typewriter. Topics covered include review of machine operative parts, typewriting techniques, secretarial shortcuts, and care and cleaning of the typewriter. A detailed topical outline of the program is given below.

A. Applications
   - Correspondence
   - Carbon copies
   - Duplication processes
   - Type of machine for type of work

B. Typewriting Techniques
   - Posture
   - Touch
   - Use of proper fingers

C. Typewriting Shortcuts
   - Dual key operation
   - Typewriting cards
   - Erasures
   - Re-insertion of paper
   - Centering

D. Supplies
   Carbon paper qualities
   Copy paper
   Types of ribbons and when to change
   Erasers

E. Care of Typewriter
   Proper cleaning
   Dry brush
   Liquid cleaner

II. Secretarial Transcribing Proficiency Program

This program is given to help prospective and experienced stenographic and secretarial employees function more efficiently. It is presented with a practice period in a two- or three-hour session. A condensed version without a practice period is given in a one-hour session.

The objectives of the program are (1) to upgrade typewriting and transcription skills, (2) to increase knowledge of typewriter and transcription equipment, (3) to improve skill in handling correspondence, and (4) to review basic business grammar and punctuation.

Topics covered include correct transcription and typewriting techniques with practice sessions, review of business grammar, letter placement, and secretarial shortcuts. A topical outline is given below.

A. The IBM Executary
   Secretarial model
   Instructional and suggestions for use

B. Perfect Letters--Transcription Hints
   Letter styles--parts of business letter
   Placement of letters
   Punctuation and rules for typewriting
   Titles and forms of address
   Word division--the dictionary
   Spelling

C. Filing and Record Keeping
   Sorting and opening mail
   Reading mail
   Arranging mail--classification and digest
   Recording mail

D. Preparing Mail for Delivery
   Signature book
   Folding letters
   Envelopes
   Using postal services
   Forwarding mail
   Air mail, telephone, or telegraph

E. More Than Words

F. Right at the Typewriter

This program can also be tailored to meet the individual needs of a customer. For example, in October 1963, an IBM educational servicesrepresentative conferred with the assistant to the personnel director of a service organization to fit the above program to the organization's requirements. A two-hour session was conducted three different times to enable 200 secretaries to attend with minimum disruption of office activities. The program that was devised is outlined below.

A. Introduction

B. Reminder Systems and Practices
   (Files and Management of Records)
   Effective use of the calendar
   Using a 'tickler' file
   Appointment reminders
   Follow-up practices
   Cross referencing

C. Reception Responsibilities
   Treatment of callers
   Telephone personality

D. Activities of the Day
   Opening and sorting of mail
   Material organization
   Dictation and transcription hints
   Typewriting shortcuts
     Assembling carbon packs and correcting multiple carbons
     Working with cards and labels
     Rush memos--special procedures
     How to deliver letters ready for signature back to supervisor
     Zip code

E. End of the Day
   Arrangement of desk
   Tips for care and keeping of the typewriter

III. Executive Typewriter Program

This program is designed to upgrade skill in using the IBM Executive typewriter. It consists of an hour session. Content includes complete explanation of the typewriter, centering, making corrections, and justifying right-hand margins.

IV. Demonstrations of Multi-Product Line

Machine demonstrations are conducted for employee groups representing commercial, government, and school accounts.

V. Individual Operator Instruction

Any employee new to IBM products is provided with whatever assistance is needed to learn IBM equipment.

Case HHH

New England Telephone and Telegraph Company[9]

The out-of-company training agency that companies responding to the questionnaire most frequently use to help train their clerical employees was reported to be the New England Telephone and Telegraph Company. This company provides whatever training is needed to help its customers in industry make the most effective use of their telephone system and create a better image in business. Activities include (1) PBX training and (2) customer consulting service.

Responsibility. These activities are the responsibility of the telephone company's PBX Department. With the exception of one employee designated as general customer consultant, employees assigned to this Department conduct both activities in addition to operating PBX and teletype machines within the Department. The general customer consultant is concerned with only the functioning of the consulting service. All employees are trained PBX operators and instructors. In addition, the consultant has had training designed especially to prepare her for working with industry.

Physical Facilities. Training activities are conducted at the customer's premises, nearby conference facilities, or the telephone company's offices.

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[9]Information furnished through the courtesy of Dorothy L. Crosby, General Customer Consultant, New England Telephone and Telegraph Company, Boston, Massachusetts.

Cost. The telephone company financially sponsors company training activities as a service to its customers. Expenses to a customer involve cost of employees' time when participating in training activities and not performing their job functions and cost of using its facilities when training sessions are held on its premises.

I. PBX Training

Companies are provided with whatever training or assistance they may need to perform their switchboard operations. PBX instructors furnish new employees with on-the-job training conducted on company premises. They also make periodic visits to each company. Companies with large switchboards are visited once a month; with a medium board, biannually; and with a small board, annually. During these visits the instructor provides additional training and uses a check list as an aid in examining and reporting the condition of technical equipment and need for replacements.

II. Customer Consulting Service

Development. The telephone exhibit at the 1939 New York World's Fair included demonstrations of proper telephone usage for business. Twelve people were trained by the New York Bell Telephone and Telegraph Company for this purpose. Many company executives who attended these demonstrations asked New York Bell to assist them in training their employees to perform similarly. As a result, New York Bell trained an instructor to provide its customers' employees with training sessions. Within four years, 25 full-time instructors were fulfilling customers' requests for training.

About four years ago, a transportation company was experiencing some difficulty in its telephone operations. When the company's president learned about New York Bell's customer training sessions, he asked whether all his company's first-line supervisors employed in 13 states could attend. This was accomplished by having telephone companies in these states send employees to New York Bell for instructor training. These employees completed a four-month training program in how to educate telephone users.

Two employees from the New England Telephone and Telegraph Company participated in this program. Upon completing this training, they developed and conducted a two-week program for the transportation company's employees in Massachusetts. Other companies in the area heard about the program and requested training for their employees. The New England Telephone and Telegraph Company decided to offer a general training session on a trial basis. The success of these sessions was evidenced by the demand for training. In the first year, 24,000 people attended sessions in the Greater Boston area. In addition, companies came to the telephone company requesting training; the telephone company did not have to seek trainees.

The successful outcome of the beginning sessions has resulted in the training function growing to its present status. The general customer consultant, one of the two Massachusetts employees trained by New York Bell, has continued to develop and conduct these training

activities for companies throughout New England.[10] Demand for training has necessitated the consultant training another employee to handle these activities in Rhode Island. In addition, 20 PBX instructors now help to conduct sessions in the Greater Boston area.

Services Offered. Included are general telephone training sessions and training activities geared to the needs of individual companies. Since the services provided by PBX instructors and by the general customer consultant are operated somewhat differently, they are discussed separately.

Training by PBX Instructors. These instructors provide companies with a general telephone training session. It consists of a 60-minute session on telephone usage held on each company's premises. Included in the session are two films on telephone usage followed by a brief question-and-answer period. Telephone brochures are distributed to participants at the close of the session.

Training by General Customer Consultant. Programs carried out by the consultant are (A) integrated training program for large companies, (B) sessions for small companies, (C) sessions for group meetings, and (D) extension-user training programs.

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[10]The Bell companies in Pennsylvania and in Buffalo, New York, are contemplating adopting training procedures developed by the consultant. Training activities conducted by the consultant differ from those that were offered by New York Bell. Customer training was terminated at New York Bell in 1961.

A. Integrated Training Programs for Large Companies

The consultant prefers to conduct the first general telephone training sessions for each company and then to assist the company in developing further training. Experience has indicated the feasibility of this plan. For example, the results of a session held for training directors helped to provide evidence supporting this training approach.

> The consultant designed an all-day session to help training directors from ten companies develop their own telephone training programs. General telephone usage and participants' specific telephone needs were discussed. After the session, the training directors attempted to conduct their own training sessions but were unsuccessful. They were unable to answer many of the employees' questions. Employees also seemed to prefer telephone sessions conducted by experienced telephone instructors.

General Training Session. This session provides employees with basic training in telephone usage. One session, or as many as needed to accommodate the customer's employees, is conducted on the customer's premises. Sessions average in length from one and one-half to two hours.

A minimum of 25 employees is required for each session. Average enrollment is about 45. Participants should be all employees who use the telephone for inside and/or outside calls. Two main reasons for this recommendation are: (1) Speed and accuracy are needed for both types of calls. (2) If employees treat each other courteously on the telephone, they will treat outsiders similarly.

Topics covered are telephone services, equipment, techniques, and voice personality. Instructional methods include a brief lecture, film presentation, and a question-and-answer period. Two of the following films are shown at each session: "For Immediate Action," "The Voice of Your Business," and "Manner of Speaking." Films may be previewed by each company for selection. At the conclusion of the session, telephone brochures are distributed to participants.

Follow-up Training. Each company is expected to provide its own follow-up training and to make provision to maintain the desired level of telephone service. This training should be developed jointly by the telephone company and the company's training function. If the telephone company develops the program, the customer will expect the telephone company to follow-up and maintain training. Each customer is urged to place specific employees, such as its training director, department heads, and/or supervisors, in charge of telephone training to help maintain satisfactory telephone performance.

After the general training session, the consultant provides supervisory employees with posters and flip charts to aid them in reinforcing their subordinates' new training experience. Techniques are suggested to each company for checking telephone usage such as:

1. The switchboard attendant can be asked to notify any extension-user who she notices needs to improve his or her telephone service.

2. Management employees can call from outside the company to determine their employees' telephone performance.

The following example illustrates how one of these suggestions has been applied:

> One day a week a company executive checks telephone usage by making 10 to 15 calls. Company extensions are selected at random and telephoned as outside calls. Upon completion of each call, if the employee handled the telephone situation satisfactorily, the employee receives $2 in the next messenger mail. If not, the employee receives a note saying, "Did you realize that when you answered the telephone you missed $2?"

The consultant also calls supervisory employees at a later date to learn the effectiveness of the training session, whether any more assistance can be provided, and their future telephone training plans. The primary purpose of these calls is to encourage supervisors to become more telephone-training conscious.

In-Company Session. Telephone training sessions are needed to maintain satisfactory telephone service and to provide incoming employees with initial training. This training should be included in orientation activities for new employees.

The consultant helps companies develop their own training session. Company trainers may observe the consultant conduct a few general training sessions. They are given a

training manual which covers telephone services, equipment, and voice. Films and any other equipment needed are loaned without charge to the company.

B. General Training Sessions for Small Companies

Although small companies are as important to the telephone company as large ones, training sessions are too expensive to conduct at companies with fewer than 25 office employees. A plan is being put into operation whereby employees from several small companies may jointly participate in these sessions. Satisfactory results were achieved when the plan was conducted on a trial basis.

A general telephone training session will be held for groups of small companies. It will be similar in content and implementation to the general training session provided for large companies. The consultant will visit company presidents to describe the program and to provide scheduling information. Prior to contacting companies, arrangements will have been made concerning when and where sessions are to be held. Companies that are interested will be invited to send their employees.

The session may be given four times during a two-day period for a group of small companies. Such a plan will enable each company to send only a part of its office staff to each session and thereby will help minimize disruption of normal work flow. The number of sessions offered will

be determined by the number of employees planning to attend. An enrollment of 50 employees is desired for each session.

Two sessions will be offered each day. They will be scheduled at times which are most convenient for participants. One session probably will be scheduled at the time participants normally report to work in order to save them travel time. The second session will be scheduled immediately after lunch. Sessions will be held at the telephone company or at other conference facilities located near participants' companies.

C. Sessions at Group Meetings

A general telephone training session is held for office employees when requested by professional associations or other organizational groups. This session usually is part of a conference, institute, convention, or workshop program. It is similar in content and implementation to the general training session provided for large companies.

The following example illustrates the inclusion of a telephone session within the framework of a seminar program.

> A two-day biennial seminar is held for graduates from the Katharine Gibbs School who are employed as secretaries in the Boston area. This program is designed to help participants perform their secretarial functions more effectively by discussing various secretarial duties. Although the program is conducted primarily by the school's faculty, a two-hour telephone session is presented on the second day by the consultant. In 1962, 160 secretaries attended; in 1964, 85 secretaries.

D. Extension-User Training Program

The consultant has just completed a pilot program which involves the determination of a company's telephone needs by studying its telephone practices and the implementation of these needs with training sessions, aids, and recommendations. The successful outcome of this program has resulted in making this service available to other companies.

Before the pilot study was even completed, another company in the vicinity learned about the program and asked to be included. The consultant plans to notify companies by inviting their personnel directors to attend a one-and-one-half-hour meeting describing the program. Each personnel director will also be invited to bring a guest, such as his superior. Companies then interested in this program will be asked to contact the consultant.

Pilot Program. Examination of the pilot program illustrates the nature of the new training program:

A vice president of a bank employing over 1,000 employees contacted the telephone company about improving telephone communications. The consultant discussed the matter with the vice president and was given permission to embark upon a pilot program geared to the bank's specific needs. At the same time the program served a dual purpose by enabling the consultant to use the understudy technique to train the recently employed service advisor in her new

responsibilities. The program is described below as involving the following steps: research, findings and recommendations, training session, and follow-up.

Research. A three-week analysis of the bank's telephone communications was made. The size of the company's switchboard operation determined the length of this study. In future programs, a minimum of two days will be spent with companies having a small operation.

Department heads in addition to top-management personnel were informed about the study that was being undertaken. Visits to work areas required that department heads be alerted.

The consultant and the service advisor carried out the following research activities:

1. Making a series of calls as a potential depositor to each work area to learn employees' telephone practices.

2. Working at the switchboard to determine how quickly employees answer and to find any congested areas that are affecting customer service.

3. Visiting work areas to observe telephone practices.

4. Observing the office's physical arrangements to determine ways to improve telephone service.

Findings and Recommendations. When the study was completed, the consultant gave an oral report to a group of top-management personnel. Their support was necessary for

continuation of the program. Without their approval, the training program would have had little value.

The report included the findings of the study, standards that have been developed by the telephone company, and recommendations for attaining these standards. Recommendations included offering training sessions on telephone usage and suggesting changes in telephone practices and facilities. Some of the suggested changes were:

1. Employees should avoid making calls during lunch periods, as customers most frequently call during this time of day.

2. Telephones should be covered during lunch periods to handle incoming customer calls.

3. Telephones should be placed at the end of teller counters to facilitate handling incoming and outgoing customer calls quickly.

The consultant held a second meeting with top management. At this meeting the consultant sought their approval of the telephone training session especially designed for their employees. The session was outlined in detail. Included was the request that a representative from management be present at each session. Management's participation was desired in order to introduce the consultant to employees and to express top management's need and desire for training. Management's presence at each session was further evidence to employees that they backed training.

Training Session. All employees from the bank's main office and branches attended a session on telephone usage. The consultant conducted four training sessions a day for two weeks. Each training session was one and one-half hours in length. No sessions were scheduled to interfere with coffee breaks or scheduled on Monday mornings or Friday afternoons when employees tend not to be as attentive.

The company's facilities determined the maximum number of employees that could attend a session. Sessions ranged in size from a minimum of 25 to a maximum of 90 employees.

The session was similar in content to the general training session offered to large companies and in addition included a report of research findings and suggestions for improving present practices. These activities were carried out as follows:

Two telephones connected to a teletrainer were used to demonstrate how employees were answering telephones in working areas. This was followed by demonstrations suggesting ways to improve these practices. The consultant could report poor telephone practices revealed by the study more easily than could top-management or supervisory personnel. Company employees could accept criticisms from the consultant because the consultant was a telephone expert and was not a company employee.

When a session contained between 25 to 35 participants, a short recording was made of each employee's voice. This gave employees an opportunity to hear his or her own voice. None were told about this activity in advance in order to avoid any anxieties. Recordings were made by passing a telephone around the group. Each employee answered the consultant's remarks with a suitable phrase. Recordings were played back. Some employees' voices were evaluated for the group. If the recordings were very poor, the telephone was sent around again. A maximum of seven minutes was allotted for the entire activity.

Follow-up Training. Supervisory employees were provided with suggestions and materials designed to reinforce instructions and to maintain correct telephone usage. The same procedures described under follow-up training for large companies were followed. In addition, the consultant hopes to receive permission to revisit the bank to determine the effectiveness of this training.

IV. Trade Associations

Some questionnaire respondents reported using outside agencies to train their nonsupervisory office employees that may be classified as trade associations. A trade association is defined as:

> An association of business organizations in a common field, or in allied fields, formed for the purpose of promoting their mutual interests, collecting industry statistics, maintaining and establishing industry standards, or for similar purposes. Also, in some cases, an organization of individual business proprietors or executives, formed for the purpose of promoting their interests as executives, as well as the interests of their common line of business.[11]

Training activities carried on by these associations range from providing aids to conducting meetings, workshops, and college-level courses. Some programs are designed for particular clerical employee classifications; others are open to all employees. Training activities for clerical employees provided by the following associations are described below: Boston Chapter, Inc., of American Institute of Banking; Savings Banks Association of Massachusetts; Insurance Institute, Boston University; and National Secretaries' Association and Center for Continuing Education at Northeastern University.

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[11]Clark and Gottfried, op. cit., p. 360.

Case III

Boston Chapter, Inc., of American Institute of Banking[12]

The American Institute of Banking, a section of The American Bankers Association, is the largest adult education institution in the United States. It was the first organization national in scope to be inaugurated at the instigation of those who were to be educated.

The Institute conducts its educational programs through chapters and study groups in 571 cities and towns or through correspondence study. Its aim is to provide courses which cover every facet of banking. During the 1964-1965 school year,[13] national membership was 200,088. Of these members, 108,486 were enrolled in Institute courses.

Of particular interest to this study is the educational program provided by the Boston Chapter for clerical employees. This program is described below.

Responsibility. A chapter is organized in a community only if there is assurance of continuing the Institute's work from year to year. Although the number of prospective members varies according

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[12]Information furnished through the courtesy of Thomas F. McLaughlin, Jr., Educational Director and Secretary, Boston Chapter, Inc., American Institute of Banking.

[13]Enrollment for 1963-1964 was slightly less than that of 1964-1965. Educational programs presented in 1963-1964 were similar to those offered in 1964-1965. The educational activities are reported for 1964-1965 to incorporate program variations introduced by the new director that was appointed in 1964.

to local conditions, a minimum of 50 is necessary if the organization is to qualify as a chapter. During the 1964-1965 school year, the Boston Chapter reported a total membership of 4,278 bank employees. Of these employees, 2,413 were enrolled in courses presented by the Chapter. This enrollment ranks fifth in size among chapter enrollments.

Each chapter is in charge of its local operations and functions within the limitations prescribed by the bylaws of the Institute and by the regulations of its Executive Council. About 90 per cent of the teaching staff in the Boston Chapter are recruited from local bank personnel. The other faculty members are lawyers, accountants, and professional teachers from high schools and colleges. During the 1964-1965 school year, the faculty consisted of 75 part-time instructors.

Participants. Any person may enroll in a course who is employed by a bank or other financial institution that is a member of, or is eligible for membership in, The American Bankers Association. Employees are guided in selecting courses by designated representatives from their bank and the Chapter. Employees' education, experience, and job responsibilities determine courses they may attend. Enrollment in each course is limited to 50 employees. Desired course enrollment is 30.

Schedule. Courses providing credit toward certificates meet three hours each week, from 5:45 to 8:45 p.m., for a 14-week period. First semester classes begin early in September to facilitate completing the required 42 class hours before the Christmas holidays.

Second semester begins the middle of January. Noncertificate courses, i.e. orientation and special courses, are held for one and one-half to three hours for 8, 12, or 14 sessions.

The first midday class was held during the 1964-1965 school year. A certificate course was provided for those employees whose work schedule prevented them from attending evening classes.

Physical Facilities. Courses are held in one of the classrooms located at the Chapter's headquarters in Boston. A few courses are also offered at central points outside the city of Boston. This arrangement permits bank employees working in these areas, or employees of intown banks living in these areas, to take courses without extensive travel. Classes are held at banks located in Brockton, Dedham, Framingham, Quincy, and Salem.

Cost. Tuition fee for each course is $30 for employees from contributing banks and $40 for employees from noncontributing banks. Most banks provide their employees with tuition reimbursement upon satisfactory course completion.

Programs. Clerical employees may enroll in (1) orientation, (2) courses required for a basic certificate, (3) courses required for a standard certificate, (4) courses required for an advanced certificate, and (5) special courses. These employees may complete course requirements for a certificate or may select individual certificate courses subject to approval by the Admissions Committee. Approval is based upon employee's background, ability, and need for course.

I. Orientation

Orientation, "How and Why of Banking," is designed for new bank personnel or those with one year or less of service. The course is given to help new employees entering the banking field adjust to their environment, to make them feel an integral part of the institution, and to create in them an interest in banking. An over-all picture of the major functions and facilities of banking and their importance to the nation and community are presented.

The course is divided into two sections to meet the differing needs of commercial banks and those of savings banks. It is presented in five two-and-one-half-hour sessions. Topics include: banking in general, human relations, banking services, credit, checks and checking accounts, personal appearance and conduct, telephone usage, and AIB advantages. The course is concluded with an examination.

II. Basic Certificate

A certificate program has been developed to provide an employee with basic banking education, breadth in banking education, and banking education in terms of personal interests. Courses required for a basic certificate are designed to give a basic background in three areas that underlie banking business. Prescribed courses include effective English, commercial law, economics, accounting I, and one restricted elective. The elective is selected from a limited number of courses: principles of bank operations, savings banking, or trust department services. The purpose of the restricted elective

is to allow some freedom of choice as to subject and to insure that the student acquires a breadth of knowledge essential to his banking career. Credit is given for equivalent courses satisfactorily completed at accredited collegiate institutions.

III. Standard Certificate

After earning the basic certificate, an employee is eligible to complete the requirements for a standard certificate. These courses are designed to help the employee develop a greater understanding of those forces which affect economic life and to obtain a grasp of the basic functions of business. The employee gains competency in accounting and facility in writing and speaking.

Courses required are business administration, money and banking, bank letters and reports, one restricted elective, and three free electives. The restricted elective group includes effective speaking and accounting II. Free electives are courses selected from the restricted elective group specified for basic, standard, and advanced certificates.

IV. Advanced Certificate

This program is designed for an employee who has earned a standard certificate and who wishes a banking career in commercial banking, trusts, investments, or savings. Courses required are public relations, financing business enterprise, supervision and personnel administration, bank management, three restricted electives, and three free electives. One restricted elective is selected from each of the following groups:

A. Installment credit, home mortgage lending, or agricultural credit.

B. Analyzing financial statements, credit administration, or bank investments.

C. Trust department services, trust department organization, trust investments, or security analysis.

Free electives are any courses in the curriculum that have not been taken previously.

V. Special Courses

These noncertificate courses are designed to broaden new or experienced employees' knowledge and understanding of current banking matters. Courses being offered include advanced public speaking, bank teller for commercial bank employees or for savings bank employees, case studies in credit administration, principles of bank data processing, principles of federal income taxation, and the use of money market instruments in managing the money position of a commercial bank.

Principles of data processing is the only special course that carries certificate credit as an elective. This is a new course intended for all bank employees. It covers the "what" and "why" of automation and its implications for banking.

Instructional Methods. Instructors use various combinations of lecture, discussion, and role-playing techniques in their courses.

Instructional Materials. Textbooks, instructor's manuals, examinations, and other teaching aids provided by the Institute's National Office are used. Each textbook is written by a distinguished author from the academic or banking field aided by the

Institute's staff and other subject-matter consultants. Each instructor's manual, prepared by the Institute's staff, contains a schedule of lessons based on the textbook, instructional suggestions, and sometimes a bibliography of collateral reading references. Final examinations are prepared by the Institute to insure uniformity.

Twice a year the Institute issues a magazine, The Faculty. This magazine acts as a medium for presenting material on teaching techniques and methods applicable to the Institute's educational program. Reports of teaching experiences and speeches presented at faculty converences are also included.

Reward and Evaluation. Course grade is based upon class performance and a three-hour final examination grade. Class performance includes a two-hour minimum of written quizzes and supplementary work such as oral recitation, reports, and notebooks. Participants receive credit toward a certificate for each course by fulfilling the following requirements:

1. Each course must be completed with a minimum grade of 75 per cent. A participant with a final examination grade of less than 60 per cent automatically becomes ineligible for course credit regardless of class work grade.

2. A participant whose attendance record falls below 80 per cent is ineligible for the final examination. A participant must attend 12 out of 14 scheduled sessions to be eligible to take the final examination.

3. A participant must be an Institute member in good standing for the entire year during which the course is taken. A record of each employee's course grade is sent to the Institute's National Office.

When requirements for a certificate have been completed satisfactorily, the National Office issues an appropriate certificate. Each employee's educational record is maintained both by the Chapter and by the National Office. These records are available to present and to future employees.

Future Plans. The Women's Committee of the Boston Chapter is planning an educational program to interest women at all levels of banking. Special courses specifically designed for women in this field are to be offered on banking and related topics.

A study is also being undertaken in the area of equivalent credit. The ultimate goal of the study is to gain recognition from schools and colleges for courses offered by the Chapter.

Case JJJ

Savings Banks Association of Massachusetts[14]

This Association is a trade organization for any mutual savings bank in Massachusetts. One of its functions is to assist banks in effectively training their officers and employees by providing them with educational programs. The Association also works closely with the American Institute of Banking in the field of banking orientation.

Programs. The Association provides bank officers and other employees, including clerical employees, with (1) one-day conferences, (2) supervisory training, (3) various operational manuals, and (4) assistance to their educational organizations. Each is described below.

I. One-Day Conference

Frequent one-day conferences are held on such subjects as personnel management, personal loans, branch banking, and automation. All officers and employees are invited to attend. In addition, twice a year an all-day conference is provided specifically for personnel of small banks, i.e. with $30 million or less in deposits. These conferences are designed to help small banks with matters particularly pertinent to them. All sessions are conducted by bank officers at a Boston hotel.

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[14]Information furnished through the courtesy of Richard Covell, Executive Assistant, Savings Banks Association of Massachusetts, Boston, Massachusetts.

II. Supervisory Training

The Association's main educational activity involves supervisory personnel training. The program is designed to provide bank officers and employees with a broader technical knowledge of savings banks' practices and procedures which will be beneficial when assuming new or greater responsibilities at the supervisory level.

Instructors. Members of the teaching staff have been selected from savings banks and allied fields on the basis of their knowledge of particular subjects and demonstrated teaching ability.

Participants. Employees are selected on the basis of previous training, work experience, degree of responsibilities, participation in other educational activities, and recommendations. Those eligible to attend are officers, branch managers, department heads, head clerks, head supervisors, and secretaries. Other employees with potential but not necessarily the background or responsibility may also attend.

The group is limited to 60. The Association tries to accommodate everyone that applies in the belief that training is needed now and not a year later.

Schedule and Physical Facilities. The program extends over a two-year period. Included are two resident sessions of one week each with directed study and case problems between sessions. Sessions are conducted at a Boston hotel.

Cost. A fee of $125 is charged annually for each participant. This fee is paid by the participant's bank. It covers tuition, room, and meals.

Content and Implementation. Topics covered are mortgages, accounting, communications, effective speaking, insurance, investments and securities, loans, personnel, and savings accounts. Instructional methods include lectures, panel discussions, organized and informal forums, and case studies. Participants are graded on research assignments. Upon completion of training, participants receive a certificate of achievement.

III. Operational Manuals

The Association has also developed a manual of operating practices and procedures. This manual is used by bank employees in their daily operations and is updated periodically. Topics covered include public relations, savings accounts, tellers' operations, dividend orders, loans, securities, accounting and bookkeeping procedures, safe deposit boxes, life insurance, abandoned property, and retention of records. Other manuals including two on consumer loans have also been prepared and distributed to member banks.

IV. Educational Organizations

Men and women employees each have their own educational groups. The Association provides these groups with assistance in program planning, arranging for meetings, staff assistance, and any other helpful way. Two employee organizations that are open to clerical employees are described below: (A) Savings Bank Forum and (B) Savings Bank Women of Massachusetts.

A. Savings Bank Forum

This group is open to men employees who are junior officers or below this rank. The Forum consists of 12 groups geographically distributed throughout the state with a total membership of 800. Each group meets monthly to discuss banking topics.

B. Savings Bank Women of Massachusetts

All women bank employees may join. This group consists of an eastern and a western chapter with a total state membership of 400. Each chapter meets monthly to discuss some phase of banking. Recent topics have included functions of the Association, public relations, and automation. Speakers, panels, and workshops are used at these meetings.

Case KKK

Insurance Institute, Boston University[15]

The Insurance Institute, sponsored by Boston University through its Division of Continuing Education, assists industry by conducting the following activities to meet educational and training needs of insurance personnel in general and/or those in individual insurance companies: (1) instruction and formal course program, (2) conference, seminar, and special short-term programs, and (3) research activities.

Participants. Educational background, experience, and job responsibilities of insurance personnel determine activities they may attend.

Schedule. Credit courses are conducted during the university's regular academic year, from September through May. They are held once a week in the late afternoon or evening. Other programs are scheduled when requested.

Physical Facilities. Activities are usually conducted at the university's in-campus facilities or at the Conference Center at Osgood Hill in North Andover, Massachusetts.

Cost. The university's regular tuition rate is charged for all courses taken for degree or for regular certificate program credit consisting of 60 semester credits. Lower tuition rates are charged

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[15]Information furnished through the courtesy of Daniel Haught, Executive Secretary, Insurance Institute, Boston University, Boston, Massachusetts.

for special examination programs and for certain short-term programs. Some companies reimburse their employees for tuition costs.

I. Instruction and Formal Course Program

One-, two-, and three-credit semester courses are offered to insurance personnel, agents, and managers. Included are courses fundamental to all fields of insurance, courses leading to professional designations, and specialized courses dealing with important developments and trends in the insurance industry. Courses are categorized according to the sequences in which they are to be taken: (a) introductory courses, for persons with no experience in the field; (b) special subject courses, for persons interested in particular types of insurance; and (c) special examination programs, for persons interested in preparing for examinations leading to special designations in the insurance field.

Many of these courses have been developed with the assistance of the Boston Chapter, Chartered Property and Casualty Underwriters; Boston Chapter of the American Society of Chartered Life Underwriters; National Association of Independent Insurance Adjusters; and the General Agents and Life Managers Association of Boston. In some cases these courses are being jointly sponsored by these organizations. Courses are conducted by Institute personnel, university faculty, and businessmen from the insurance industry.

II. Short-Term Programs

Conferences, seminars, or residential learning experiences are developed through the cooperation of Institute personnel, university

faculty, and educational leaders in the insurance field. These activities are developed to meet the specific needs of the insurance industry.

Included are special seminars such as risk management, multiple line and multi-peril coverages; fire, auto, and multiple line rating; life insurance industry; and agency management and supervision. An induction program has been developed to supplement industry training in the initial preparation of new agents in the life insurance business. This program covers basic life insurance fundamentals, selling fundamentals, fundamentals of programming, effective prospecting, and time control. All or any part of this curriculum will be offered upon request.

Also included are consulting and in-plant services to individual insurance companies and agencies. These activities are designed to be of use to the insurance industry by focusing the capabilities of a university on special problems. Previous in-plant programs have placed emphasis on areas of management, time control, motivation and leadership, communications, and sales training. These programs are the result of individual conferences with the Institute and company or agency personnel.

The above programs have been designed primarily for management and supervisory personnel. Recently some nonsupervisory activity has been included in the form of a workshop for clerical employees. This workshop is described below.

A. Clerical Employees' Workshop

Development. Insurance executives expressed a need for better clerical employees. This prompted the Institute to sponsor a one-day professional development program as a means of enabling clerical employees to increase their knowledge. The first program was offered in 1962.

Responsibility. The program is developed and administered by the Institute's staff. Instructors are professional businessmen and university faculty members. They are selected on the basis of their business and teaching abilities. Businessmen with industrial or university teaching experience are selected from the insurance industry; university faculty members with business experience, from teaching areas such as insurance, management, communications, and marketing.

Participants. The workshop is offered to clerical employees of those firms who have management personnel belonging to the Massachusetts Association of Insurance Agents.

Physical Facilities and Schedule. A workshop is held annually in three parts of Massachusetts: the western area of the state, the Worcester area, and the Dedham area. Conference rooms belonging to a restaurant located in each area are used. Each workshop is scheduled for two days from 8:30 a.m. to 4:30 p.m.

Cost. Each participant is charged a fee of $5 to cover luncheon and educational material expenses. The fee is paid by the participant's company. The need for this program may result in its inclusion in the university's regular course offerings. In this event, a fee based on the university's regular tuition rate would be charged.

Content. Although the program's conceptual framework has been relatively the same each of the two years it has been offered, its content has differed to some extent. Variation has been necessary because many participants of the first program returned to attend the second one.

The general format of the program is as follows: The first session is three hours in length and deals with rating and underwriting different kinds of insurance. Participants select the section that discusses this subject in relation to the kind of insurance in which they are interested.

The second and third sessions are each two hours in length and deal with behavioral concepts. The second session concerns counterselling--the identification of the customer's needs and the attempt to satisfy these needs through facilities available to the seller. The third session presents a professional concept of existence. This discussion centers around the clerical employee's relation and responsibilities to her company's function.

Instructional Methods and Materials. Lecture and discussion techniques are used. After each session, participants are divided into small groups to encourage individual participation. A group leader guides the group in discussing session topics and in completing assigned work projects. Booklets are distributed to participants to supplement session presentations.

Reward. Upon completion of training, participants receive a certificate of attendance.

Evaluation. At the close of the workshop, participants are asked to evaluate the program. They complete a questionnaire containing the following questions:

Do you feel the program was relevant to your specific job needs?
Was the program interesting?
Was the program too technical?
Was the program not technical enough?
Was the program too elementary?
Was the program too abstract?
Would you recommend that other people attend the program?

Answers to these questions are used in helping to plan future programs.

Future Plans. The success of these workshops and the continual need to disseminate information to clerical employees may result in the development of a more advanced program for clerical employees. Such a program would help clerical employees function more efficiently. Major

determinants in the realization of this program will be industry's desire for this training and the availability of the Institute's time.

III. Research Services

The Institute and the insurance industry are working increasingly together in the development and conduct of research projects in the area of higher education. The technical facilities of the university are being utilized to investigate economic, financial, and social problems that have implication for the insurance industry and the society which it serves.

Case LLL

National Secretaries' Association and Center for Continuing Education at Northeastern University[16]

The National Secretaries' Association and the Center for Continuing Education at Northeastern University in Boston co-sponsor (1) a series of programs for secretaries and (2) a review course for certified professional secretaries' examinations. This case could have been also classified under consulting agencies. It has been classified, however, under trade associations because the National Secretaries Association fits the definition of a trade association in that it was formed to promote the interests of secretaries.

I. Programs for Secretaries

A series of programs have been designed to help a secretary perform secretarial functions more efficiently and to prepare her for more administrative responsibilities commensurate with ability, experience, and education.

Responsibility. Programs were developed and are maintained by representatives from both organizations. Sessions are conducted by university professors and management specialists from consulting organizations and other firms in industry.

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[16]Information furnished through the courtesy of Janet Wagar, member of the Boston Chapter of the National Secretaries' Association and secretary to Dr. Albert E. Everett, Dean, Center for Continuing Education, Northeastern University, Boston, Massachusetts.

Participants, Schedule, Physical Facilities. Secretaries attend from the New England area. Enrollment in each program is limited to 30 secretaries. Programs are held at the Henderson House, Northeastern's Conference Center in Weston, Massachusetts.

Programs. Three programs are offered annually: (1) basic residential seminar, (2) advanced residential seminar, and (3) management workshop. Each is described below according to objectives, participant qualifications, schedule, cost, content, and implementation.

A. Basic Residential Seminar

This seminar is designed to assist the professional secretary in effectively executing the myriad responsibilities of her position through a better understanding of herself, her function, and her relationships with others in performing her job. It consists of a group of sessions held during a weekend in the fall, beginning at 6:30 p.m. on Friday evening and closing early Sunday afternoon. A fee of $60 is charged each participant. This fee covers all expenses, including meals and overnight accommodations.

Topics covered include the future role of the secretary, managerial responsibilities, human relations, modern office management communications, and what makes for success. An outline of the program, including a brief description of some of the meetings, is presented below.

Time	Subject
Friday	
6:30 - 7:30 p.m.	Dinner at Henderson House
7:30 -	"The Future's Challenge to the Secretary." The forces that are shaping the secretary's future and the opportunities that can be hers are presented.
	"The Secretary As Part of the Management Team."
Saturday	
7:30 - 9:00 a.m.	Breakfast
9:00 - 12:00	"People and Work." Psychology of human behavior in the work environment; factors contributing to attitudes and motivation, self-development, leadership, morale, etc., are discussed.
12:00 - 1:30 p.m.	Luncheon
1:30 - 4:00	"Modern Management in the Office." Getting things done through people, organization, and work methods; communications, internal and external--effective correspondence and records management are discussed.
	"Our Cultural Heritage."
Sunday	
7:00 - 10:30 a.m.	Breakfast and Church Attendance
10:30 - 12:30 p.m.	"What Makes for Success?"
12:30	Luncheon--Presentation of Certificates

Instructional methods include lecture and discussion techniques. Instructional materials include those prepared by the agencies. Upon completion of the seminar, certificates are awarded secretaries to indicate their participation.

B. Advanced Residential Seminar

This seminar is a continuation of the basic residential seminar. Secretaries who have attended the basic seminar are eligible to attend.

The seminar is held during a weekend in the spring, beginning at 6:30 p.m. on Friday and ending early Sunday afternoon. A fee of $60 is charged. All expenses, including meals and overnight accommodations, are included in this fee.

Topics covered include American business in a changing world, the management function, communications in action, reports and conferences, and business ethics for the professional secretary. An outline of the program, including a brief description of some of the meetings, is given below.

Time	Subject
Friday	
6:30 - 7:30 p.m.	Dinner at Henderson House
7:30 -	"American Business in a Changing World." Covers the United States in our dynamic economy; forces shaping the future of our free-enterprise system; the integrated behavioral responsibilities of business, government, and labor; and the socio-economic-political implications of today's isms.

Time	Subject
Saturday	
7:30 - 8:30 a.m.	Breakfast
9:00 - 10:30	"Our Business System." Covers profitability and foundation to corporate policy; essence of competition and role of the market; socio-economic responsibilities of business; divisions of the business structure and forms of organization; and change and its relations to business planning.
10:30 - 12:00	"The Secretary and the Management Process." Covers what is involved in management; modern management concepts; role of the manager in planning, organizing, integrating, supervising, and measuring achievement; and specific responsibilities, authority, and accountability of the secretary's boss and her changing role.
12:00 - 1:00 p.m.	Luncheon
1:30 - 4:30	"Communications in Action." Covers why is communications the number one problem of American business; its vital role in effective management; roadblocks to effective communications; secretary as a communicator; art of listening; gathering facts and presenting them meaningfully; and business conferences--the secretary's role in conference preparation, participation, and administration.
6:00 - 7:30	Dinner
7:30 -	"Our Cultural Heritage." A dramatist is presented.
Sunday	
8:00 - 10:00 a.m.	Breakfast and Church Attendance
10:30 - 12:30 p.m.	"Business Ethics and the Professional Secretary."
12:30 -	Luncheon--Presentation of Certificates

Instructional methods include lecture and discussion techniques. Instructional materials include those prepared by the agencies. Upon completion of the seminar, certificates are presented to secretaries to indicate their participation.

C. Management Workshop for Professional Secretaries

This program consists of eight workshop sessions. It focuses on the structure of business and on management functions and provides top secretaries with a better orientation to their present jobs and a better understanding of the "world of business" in which their bosses must make management decisions which can become the basis for continued learning for future job requirements and opportunities. Participation is limited to (1) graduates of basic and advanced residential seminars, (2) certified professional secretaries, and (3) administrative personnel with equivalent background of education and experience.

A workshop is held on the second Saturday of the month from October through May. It begins at 9:00 a.m. and ends at 4:30 p.m. The fee is $125 for each participant. All expenses for the eight workshops, including lunches and refreshment breaks, are included in this fee.

Topics covered in each workshop session are as follows:

Session	Topics
1	Covers competitive aspects of our business system: profitability as the keystone and our monetary system which supports it.
2	Covers structure of business, objectives and philosophies of business, forms of business ownership, risks of doing business, and methods of financing.
3	Covers production and marketing functions, their processes and interrelationship.
4	Covers role of government today in its relationship to business; agencies that service and regulate business activities; areas of competition and cooperation; and stimulating, stabilizing, and restraining influences.
5	Covers management and motivation: the human factors which influence behavior in the work environment--motivation in man-manager relationships, creativity, and the leadership role.
6	Covers labor-management relations: the socio-economic development of labor unions; process of collective bargaining; government policies and the bargaining process; major current issues; and public policy.
7	Covers management process: management as a function; the manager--his professional characteristics and responsibilities; the processes of decision-making and delegation.
8	Covers management process: planning aspects of management and a consideration of the systems concept of integrated management with controls of performance effectiveness.

Instructional methods include lecture, case discussion, role playing, and other techniques to stimulate participation. Instructional materials include those prepared by the agencies. For each session, participants prepare outside reading assignments, projects, and case analyses to achieve maximum learning.

Upon completion of the workshop program, participants receive a certificate of achievement.

II. Review Courses

A comprehensive review course is offered secretaries planning to prepare for the certified professional secretaries' examination. The course consists of ten class sessions conducted for each of the following sections of the examination: secretarial accounting, business law, and business administration--economics. Corollary instruction in the remaining sections of the examination is provided through supervised supplementary reading and discussion: human relations--personal adjustment, secretarial procedures, and secretarial skills.

This course is conducted on campus by university faculty members. It is held a total of ten Saturdays, beginning in September and ending in April. On each Saturday, a two-hour session is held for each of the three sections.

Students may enroll in one or more sections. They are charged $30 apiece for each section attended.

APPENDICES

APPENDIX A

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
A	Bank	1,000 & over	OJT by supvs		All	
			Getting Acquainted with Bank	Prepare for work in company/Orient to company and skill train in telephone usage	All new	One-day program of lectures and bank tour
			Teller Training	Prepare for work in company or for job advancement to teller position/Orient to company, skill train in teller duties, and skill train in customer relations techniques	New tellers, interested	Combines class instruction with understudy method lasting from 3 to 12 months; programmed instruction under consideration
			Future: Grooming and Dress	Prepare for better job performance/Improve job appearance	All female	Outside speaker to conduct lecture for each age group
			Tuition Aid	Aid for AIB courses or for college courses related to present or to future work	Permanent	Full aid is given
			IBM Proficiency	Increase typewriting proficiency	Volunteer	One-hour class by IBM representative
B	Retail	100–249	OJT by supvs		All	
			Temporary Clerical Training Program	Prepare for work in company/Orient to company and skill train in job duties	New credit clerk, card writer, denominator, editor, sorter, verifier, acknowledgment typist	Between November and December weekly orientation sessions are combined with supervised OJT; editors also receive 6½ hours of class instruction
			Tuition Aid	Aid for courses related to present work	Permanent	Amount of aid based on grade received
C	Insurance	100–249	OJT by supvs, nonsupvs		All	
			Clerical Induction Program	Prepare for work in company/Orient to company, skill train in job duties, and skill train in office procedures	All new	OJT supplemented with class instruction over four-day period
			Clerical Orientation	Prepare for work in company/Orient to company	All new	One-hour lecture held weekly for 7 weeks after 3 months with company
			Operative Skills Course	Prepare for better job performance/Skill train in new or present job procedures or skills	Permanent	One or more hour classes held in work area for small group by supervisory or nonsupervisory clerical employee

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
C (Continued)	Insurance	100–249	Job Instruction Training Course	Prepare for better job performance/Skill train in effective teaching methods	Nonsupervisory trainers	Four or five two-hour sessions held by training manager
			Tuition Aid to Be Offered			
D	Service	20–49	OJT by supvs, preds, fellow employees, office manuals		All	
			One-Day Training Institute	Prepare for better job performance/Skill train in job procedures and in special job skills and knowledges	Permanent typists and secretaries	One-day program of lectures held annually by central office for all offices within the state
			Tuition Aid	Aid given on individual basis for courses related to present or to future work	Selected	50% of tuition paid; a tuition aid plan for all employees is under consideration
E	Service	250–499	OJT by preds, supvs, fellow employees		All	
			Orientation	Prepare for work in company/Orient to company and skill train in secretarial job duties	New secretaries	Half-day orientation in personnel department followed by OJT by lead secy; 2 to 4 weeks later individual conference with assistant to office manager
			Workshops	Prepare for better job performance/Skill train in job duties and procedures and in special skills and knowledges	All secretaries	Workshop consists of one session repeated several times; includes class instruction and supervised practice; length of sessions dependent on complexity of subject matter
			Lectures	Prepare for better job performance/Skill train in job duties and in special secretarial skills and knowledges	Secretaries with 2 years' minimum longevity	Outside speakers periodically invited to lecture during working hours
			Future: Secretarial Conferences	Prepare for better job performance/Skill train in increasing knowledge of company and in secretarial job duties and procedures	Permanent secretaries	Conference to be held for each group of six secretaries

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
E (Continued)	Service	250–499	Future: Secretarial Training for High School Graduates	Prepare for work in company/Orient to company and skill train in secretarial job duties and refinements	Selected high school secretarial seniors	Pilot program will provide individual instruction combined with supervised OJT; during senior year, trains 3 afternoons a week; after graduation, trains full time until assigned secretarial position
			N. E. Telephone and Telegraph Company	Skill train in learning or improving switchboard operation	Switchboard operators	
F	Insurance	100–249	OJT by supvs, fellow employees		All	
			Key Women	Prepare for better job performance/Orient to company and skill train in job duties and in special skills and knowledges relating to the secretarial function	Selected permanent female	Two-hour lecture and discussion session held weekly for 12 to 16 weeks; topics related to company and secretarial functions
			Orientation	Prepare for work in company and later prepare for better job performance/Orient to company and skill train in secretarial skills and knowledges	All new	One-hour lecture held daily for 2 weeks followed by bimonthly meetings for a 2-year period
			Junior Secretaries Training Program	Prepare for work in company/Orient to company and skill train in secretarial job duties and in skills	Selected June high school sectl grads	Job rotation plan combined with weekly hour meeting with personnel manager; training begins in June and completed within a year
			Tuition Aid	Aid for any course of value to employees' self-development	Permanent	50% of tuition paid by company
G	Bank	250–499	OJT by supvs		All	
			Orientation	Prepare for work in company/Orient to company and skill train in job duties and in telephone usage	New	Introduction to bank officials followed by OJT by department or section heads, basics course, telephone improvement program, and 3 movies about bank

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
G (Continued)	Bank	250–499	Basics Course	Prepare for work in company or for better job performance/Acquaint with bank's operation	All	One-hour lecture held weekly for 8 weeks; tour of bank conducted ninth week; lectures held half on company time and half on employee's own time
			Telephone Improvement Program	Prepare for work in company or for better job performance/Skill train in telephone usage	All	Attend a two-hour session every 12 to 18 months
			Future: Secretarial Training Program	Prepare for work in company, for better job performance, or for job advancement/Skill train in secretarial job duties	All secretaries and stenographers	A group of four one-hour sessions is being developed for each secretarial level
			Tuition Aid	Aid for courses related to present or to future work	All	Amount of aid depends upon relation of course to employee's present or future job
H	Manufacturing	250–499	OJT by preds, supvs, fellow employees		All	
			June Graduate Program	Prepare for work in company/Orient to company and skill train in secretarial job duties and in technical typewriting and shorthand	Selected new secretaries	Three- to 9-week program combines vestibule training with secretarial loan-out service to other departments ; can be held whenever a large group is employed
			Secretarial Group Lectures	Prepare for work in company/Orient to company and skill train in job duties	New clerk typists, stenos, secys	One hour lecture held daily for 4 days whenever a total of 6 to 8 new employees accumulate; held when above program is not in process
			Tuition Aid	Aid for courses related to present or to future work	Permanent	Full aid for courses directly related to present work; 50%, for other courses
I	Service	500–999	OJT by supvs, fellow employees		All	
			Medical Transcriptionists Program	Prepare for work in company/Orient to company; skill train in transcriptionist's job duties and in medical science and machine transcription	New medical transcriptionists	One-year program combines vestibule training with supervised OJT experience; requested to stay 6 months after completion of training

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
J	Manufacturing	500–999	OJT by supvs, fellow employees, reference manual		All	
			New Employee Secretarial Training Program	Prepare for work in company/Orient to company; skill train in secretarial duties and regular and technical shorthand, typewriting, secretarial procedures, and office machines	New secretaries	Six-week to one-year program combines vestibule training with supervised typewriting activities in pool-type arrangement and secretarial loan-out service to other departments; permanent placement when performance satisfactory
			Future: Improvement Program	Prepare for better job performance/Skill train in job duties and in special skills and knowledges	Permanent secretaries	Program is to be held after working hours; will attend at request of supervisors or voluntarily
			Tuition Aid	Aid for courses related to present job	Permanent	Full aid is given
K	Bank	1,000 & over	OJT by supvs or preds		All	
			Clerical Orientation Program	Prepare for work in company/Orient to company; skill train in job duties and in typewriting, machine transcription, shorthand, telephone, spelling, grooming and etiquette, reference materials, and soon 10-key adding machine operation	New typists, dictaphone transcribers, stenos	Three to 12-month program combines 2 weeks of vestibule training with temporary job assignments for new employees hired from middle of May to end of July; individual instruction given at other times of year
			Correct Typing	Prepare for better job performance/Skill train in typewriting deficiencies	Permanent with typewriting duties	One-hour session held 3 times a week for 8 weeks
			Telephone Training	Prepare for better job performance/Skill train in telephone techniques	Selected permanent	One-hour group session followed by 15-minute individual conference
			Tuition Aid	Aid for AIB courses	All	Full aid is given
L	Insurance	500–999	OJT by supvs		All	
			New Employee Orientation	Prepare for work in company/Orient to company and skill train in job duties	New clerical	Three-month rotation plan includes supervised OJT and office manual study

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
L (Continued)	Insurance	500–999	Basic Telephone Techniques	Prepare for better job performance or for job advancement/Skill train in telephone usage	Permanent secys, senior typists, telephone contact	One day a week is set aside for company courses; all meet for a 1½-hour session for a certain number of weeks. This course is 6 weeks in length (6 sessions)
			Business English	Prepare for better job performance or for job advancement/Skill train in English fundamentals	Permanent secys, senior typists	6 weeks in length
			Modern Business Letter Writing	Prepare for better job performance or for job advancement/Skill train in basic letter writing principles	Permanent secys, senior typists	6 weeks in length
			Secretarial Development	Prepare for better job performance or for job advancement/Skill train in secretarial function	Permanent secys, senior typists	6 weeks in length
			Techniques of Good Manners	Prepare for better job performance or for job advancement/Skill train in office procedures	Interested permanent	6 weeks in length
			Office Personnel	Prepare for better job performance or for job advancement/Skill train in office relations	Interested permanent	2 weeks in length
			Basic Fundamentals of Effective Speaking	Prepare for better job performance/General education course	Interested permanent	6 weeks in length
			Speeded Reading	Prepare for better job performance/General education course	Interested permanent	8 weeks in length
M	Utilities	250–499	OJT by supvs		All	
			Orientation and Induction Training	Prepare for work in company/Orient to company and skill train in job duties and procedures	All new	One day of lectures is combined with 6 days of supervised OJT
			Stenographic Pool Training	Prepare for work in company/Orient to company; skill train in secretarial job duties and in basic secretarial skills	June high school secretarial graduates	Supervised training in steno pool is followed by loan-out assignments; training usually completed within 6 months
			Customer Relations	Prepare for better job performance/Skill train in employee and in customer relations	Permanent public contact	Five 2-hour sessions held within a 3-day period consisting of lecture, discussion, panel, films, and practice
			Effective Reading	Prepare for better job performance/General education course	Permanent	Two-hour weekly session consisting of lecture, discussion, and practice held for 8 weeks

APPENDIX A--Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
M (Continued)	Utilities	250–499	Telephone Courtesy	Prepare for better job performance/Skill train in telephone usage	All telephone contact	Weekly 1½-hour session held for 3 to 6 weeks; future plans involve appointing supervisors to monitor and analyze employees' calls to customers followed by more training if needed
			How Our Business System Operates	Broaden general educational background/ General education training in economic education	Permanent	Three 1½-hour sessions held after working hours
			The American Free Enterprise System	Broaden general educational background/ General education training in economic education	Permanent	One 2½-hour session held after working hours
			Tuition Aid	Aid for courses related to present or to future work	Permanent	Tuition loaned; if course helpful on job, 50% of tuition paid by company
N	Insurance	500–999	OJT by preds, supvs, fellow employees		All	
			Secretarial Services Training	Prepare for work in company/Orient to company and skill train in secretarial duties and in typewriting, machine transcription, English fundamentals, and general and company secretarial procedures	Selected new high school grads with typewriting ability	Four to 8 weeks of vestibule training conducted from 8:45 a.m. to 4:45 p.m.
			Principles of Shorthand	Prepare for job advancement/Skill train in shorthand theory	Permanent typists	One-hour session held daily for 25 weeks
			Intermediate Shorthand	Prepare for job advancement/Skill train in shorthand theory and dictation	Permanent typists	One-hour session held 3 times a week for 25 weeks
			Advanced Shorthand	Prepare for job advancement/Skill train in shorthand dictation and transcription	Permanent typists, stenos	One-hour session held 3 times a week for 25 weeks
			Typing Skills Improvement	Prepare for better job performance/Skill train in typewriting productivity	Permanent typists	Course set up as typewriting clinic; one daily session held for five weeks
			Secretarial Skills	Prepare for better job performance/Skill train in reported secretarial deficiencies, e.g. basic English mechanics and typewriting	Permanent stenos, secys	One-hour session held 3 times a week for 12 weeks; brush-up course covers basic skills; emphasis depends on group's needs
			Orientation	Prepare for work in company/Orient to company	All new	Daily one-hour session held for a 2-week period one month after employment

APPENDIX A--Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
O	Retail	250—499	OJT by supvs, preds, fellow employees		All	
			Comptometer Training	Prepare for job advancement/Skill train in comptometer operation	Interested permanent file clerks, clerks	Ten 2-hour classes held for 3 weeks after hours
			Tuition Aid	Aid for courses related to present or to future work at secretarial school	Selected permanent	Arrangements made with evening secretarial school to send employees for training in typewriting, shorthand, and related subjects
P	Retail	500—999	OJT by dept instructers; dept manuals		All	
			Typing Instruction	Prepare for work in company, for better job performance, or for job advancement/Skill train in typewriting operation	General Clerical, typists, stenos	One-and-one-half hour daily session held for a total of 75 to 100 hours
			Future: Comptometer Training	Prepare for work in company or for job advancement/Skill train in comptometer operation	All interested	Basic course to be given on company time
			Future: Number Typing	Prepare for work in company/Skill train in typewriting numbers	Housewives with typewriting skill	First week of employment to combine a daily one-hour typewriting class with non-typewriting job assignments
			Future: Number Typing	Prepare for better job performance/Skill train in typewriting numbers	Permanent with number typewriting duties	One-hour session held daily for a week
Q	Insurance	1,000 & over	OJT by supvs, fellow employees, preds		All	
			Beginning Typing	Prepare for job advancement/Skill train in machine operation	Permanent	One-hour class held daily for 9 weeks
			Intermediate Typing	Prepare for better job performance or for job advancement/Skill train in machine operation	Permanent with some typewriting skill	One-hour class held daily for 6 weeks

APPENDIX A--Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
Q (Continued)	Insurance	1,000 & over	Advanced Typing	Prepare for better job performance or for job advancement/Skill train in typewriting speed and accuracy	Permanent with minimum typewriting skill of 40 cwpm	One-hour class held daily for 2 weeks
			Numerical Typing	Prepare for better job performance/Skill train in typewriting numbers	Permanent with typewriting skill	One-hour class held daily for 2 weeks
			Briefhand	Prepare for better job performance or for job advancement/Skill train in rapid writing	Permanent	One-hour class held daily for 6 weeks
			Transcription	Prepare for better job performance or for job advancement/Skill train in transcription	Permanent with shorthand knowledge	One-and-one-half-hour class held daily for 6 weeks
			Secretarial Procedures	Prepare for better job performance or for job advancement/Skill train in secretarial know-how	Permanent with typewriting and shorthand skills	One-hour class held daily for 2 weeks
			Friden Calculator for Beginners	Prepare for better job performance or for job advancement/Skill train in machine fundamentals	Permanent	One-hour class held daily for 1 week
			Friden Calculator--Advanced	Prepare for better job performance or for job advancement/Increase knowledge of machine operation	Permanent users	One-hour class held daily for 1 week
			Marchant Calculator	Prepare for better job performance or for job advancement/Skill train in machine operation	Permanent	One-hour class held daily for 2 weeks
			Ten-Key Adding Machine	Prepare for better job performance or for job advancement/Skill train in machine operation	Permanent	One-hour class held daily for 2 weeks
			Business Arithmetic	Prepare for better job performance/Skill train in fundamentals	Permanent	One-hour class held daily for 6 weeks
			Key Punch Training	Prepare for work in company/Skill train in job duties and in machine operation	Selected new	Two-week program combines individual and group instruction with practice sessions
			Training Trainers	Prepare for increased job responsibilities/Skill train in supervisory techniques for on-the-job training of other employees	Permanent non-supervisory	One-hour class held daily for 1 week

APPENDIX A—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING EXTENSIVE FORMAL CLERICAL TRAINING

Case	Type of Firm	Clerical Size Category	Informal and Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
Q (Continued)	Insurance	1,000 & over	Special Job Assignments	Prepare for increased job responsibilities/Skill train in job duties and/or in special skills and knowledges needed for a certain assignment	Permanent	One-hour class held daily for as long as necessary, usually 1 week; training on an individual basis
			Special Typing Instruction	Prepare for job advancement or for personal use/Skill train in machine operation	Physically handicapped or nearing retirement	One-hour class held daily for as long as necessary
			Future: Secretaries' Workshop	Prepare for better job performance/Skill train in job duties and in secretarial skills and knowledges	Permanent secretaries	Junior secys to meet one hour each month; executive secys to meet one hour four times a year

APPENDIX B

DIGEST OF FORMAL CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING LESS EXTENSIVE TRAINING FOR CLERICAL EMPLOYEES

Case	Type of Firm	Clerical Size Category	Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
AA	Insurance	500–999	Orientation	Prepare for work in company/Orient to company and office functions	All new	One-day program of lectures
			Future: Supervisory Training	Improve job performance and prepare for job advancement	Permanent	
			Tuition Aid	Aid for courses related to present or to future work	All	50% of tuition paid by company
BB	Service	500–999	Orientation	Prepare for work in company/Orient to products and policies	All new	Conducted by programmed instruction; will be given to all employees soon
			Orientation for Branch Office Secretaries	Prepare for better job performance/Orient to production and procedural operations	Branch sales secys with longevity	Five-day retraining program attended periodically at home office; course to be programmed soon
			Tuition Aid Being Considered			
CC	Manufacturing	100–249	Personnel Training Program	Prepare for work in company/Orient to company and skill train in secretarial duties	New secys	Two-hour orientation session is followed by 3-month rotation program in selected departments under supervision of department head and a supervisor
			Tuition Aid	Aid for courses related to present or to future work	Permanent	75% of tuition paid if a minimum grade of B is received
DD	Insurance	500–999	New Secretarial Training Program	Prepare for work in company/Orient to company and skill train in secretarial duties	Selected June high school graduates	One-year assignment as understudy to department head secy is followed by assignment as secy to assistant department head; placed as department head secy when eligible
			Tuition Aid	Aid for courses related to present or to future work	Permanent	Full aid is given

APPENDIX B—Continued

DIGEST OF FORMAL CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING LESS EXTENSIVE TRAINING FOR CLERICAL EMPLOYEES

Case	Type of Firm	Clerical Size Category	Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
EE	Insurance	1,000 & over	Secretarial Training Program	Prepare for work in company/Orient to company and skill train in secretarial duties	June high school or junior college graduates	Two-hour orientation session is followed by understudy assignment to an executive and to an experienced secy; promoted to permanent position within 1 year
			Tuition Aid	Aid for courses concerned with insurance	Permanent	Full aid is given
FF	Insurance	50—99	Monthly Meeting	Prepare for better job performance/Orient to company and skill train in office duties and procedures	Permanent	One- or two-hour meeting scheduled each month
			Tuition Aid	Aid for any course	All	Full aid is given
GG	Bank	20—49	Meeting	Prepare for better job performance/Orient to company and skill train in office duties and procedures	Permanent	One- or two-hour meeting scheduled when needed
			Tuition Aid	Aid for AIB courses	Permanent	Full aid is given
HH	Bank	20—49	Induction Program	Prepare for better job performance/Orient to company; skill train in various job duties and procedures; skill train in customer relations techniques	All	Six-week program of 1½-hour weekly class; program conducted continuously during year; 4 to 6 employees attend at one time
			Tuition Aid	Aid for courses at AIB and at other institutions when approved	All	Full aid is given
II	Bank	100—249	Teller Training	Prepare for work in company or for job advancement to teller position/Orient to company; skill train in teller duties; skill train in customer relations techniques	New tellers, interested permanent	Three days of class instruction is combined with 3 weeks to 3 months of understudy training
			Tuition Aid	Aid for AIB courses	All	Full aid is given

APPENDIX B—Continued

DIGEST OF FORMAL CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING LESS EXTENSIVE TRAINING FOR CLERICAL EMPLOYEES

Case	Type of Firm	Clerical Size Category	Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
JJ	Bank	250–499	Teller Training	Same as Case II—Teller Training	New tellers, interested permanent	Four days of class instruction is combined with 3 months of understudy training
			Tuition Aid	Aid for AIB courses	All	Full aid is given
KK	Bank	100–249	Teller Training	Same as Case II—Teller Training	New tellers, interested permanent	Four-week program combines class instruction with understudy training
			Tuition Aid	Aid for AIB courses and for other approved courses	All	50% of tuition costs paid by company
LL	Bank	1,000 & over	Teller Training	Same as Case II—Teller Training	New tellers, interested permanent	Six-week program combines class instruction with understudy training
			Tuition Aid	Aid only for courses that bank requests an employee to take	Selected	Full aid is given
			Future Plans	Plan to add a training director		
MM	Bank	1,000 & over	Teller Training	Same as Case II—Teller Training	New tellers, interested permanent	Two weeks of class instruction is followed by understudy training for indefinite period
			Customer Relations	Prepare for better job performance/Skill train in customer relations techniques	Permanent public contact	Two 3-minute meetings held weekly for 12 weeks
			Tuition Aid	Aid for AIB courses	All	Full aid is given
NN	Wholesale	50–99	Telephone Sales Training	Prepare for work in company/Orient to company; skill train in job duties and special company knowledge	New telephone sales	Three- to 9-month program combines supervised OJT with periodic class meetings

APPENDIX B—Continued

DIGEST OF FORMAL CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING LESS EXTENSIVE TRAINING FOR CLERICAL EMPLOYEES

Case	Type of Firm	Clerical Size Category	Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
OO	Manufacturing	100–249	Sales Department Secretaries	Prepare for work in company/Orient to company; skill train in job duties; skill train in special company skills and knowledges	New sales secys	One-year training program consists of plant tours, occasional class instruction, and supervised OJT by salesmen
			Tuition Aid	Aid only for courses at Boston University	Permanent	Full aid is given
PP	Manufacturing	250–499	Stenographers' Pool	Prepare for work in company/Orient to company; skill train in stenographic duties and procedures	New stenos	Two secys in charge of pool provide supervised OJT, office manual usage, and occasional class instruction; training varies from several months to 2 years depending upon individual
			Key Punch Training	Prepare for work in company/Skill train in key punch job duties and key punch operation	New or interested permanent	Individual instruction given by experienced operator; within 3 months usually skilled for permanent assignment
			Tuition Aid	Aid for courses related to present or to future work	Permanent	Full aid is given
QQ	Service	250–499	Skill Training Program	Prepare for temporary positions or for job advancement/Skill train in typewriting or skill train in comptometer operation	Some typewriting knowledge or anyone interested	One day to 1 month of day time instruction is given on employees' own time
			Comptometer Training	Prepare for work in company or for temporary positions or for job advancement/ Skill train in comptometer operation	Anyone interested	Two-hour evening class of individual instruction is held twice a week for a month; program offered twice a year; employees attend on own time
RR	Manufacturing	250–499	Comptometer Training	Prepare for work in company or prepare for job advancement to comptometer position/ Skill train in comptometer operation	New or interested permanent	Business teachers employed to conduct courses courses on company premises whenever training is needed
			Secretarial Brush-up Courses	Prepare for better job performance or for job advancement/Skill train in secretarial skills, e.g. shorthand and typewriting	Permanent secys, stenos	Same as above
			Tuition Aid	Aid for courses related to present or to future work	All	Partial aid is given; amount dependent on grade received

APPENDIX B—Continued

DIGEST OF FORMAL CLERICAL TRAINING ACTIVITIES OF THOSE COMPANIES CONDUCTING LESS EXTENSIVE TRAINING FOR CLERICAL EMPLOYEES

Case	Type of Firm	Clerical Size Category	Formal Training Activity	Purpose and Type of Program	Eligible Clerical Employees	Program Implementation
SS	Manufacturing	1,000 & over	Skills Training Program	Prepare for job advancement/Skill train in typewriting and shorthand	All	Skill courses offered after hours; at present program is not being offered but will be reinstated when economic conditions change
			Speed Reading	Prepare for better job performance/General education course	Interested permanent secretaries	Two-hour course is held weekly for 10 weeks; 30 minutes of each class held on company time
			Future: Speed Reading	Another division of the company is contemplating offering this course to its secys		
			Tuition Aid	Aid for courses related to present or to future work	All	Up to $150 aid is available each semester
TT	Manufacturing	500–999	The General Course	Broaden general educational background and provide fresh educational start/General education courses	All	English, mathematics, and science courses offered in afternoon before or after working shift; courses consist of 1½-to 2-hour session held 2, 3, or 4 times a week for 10, 20, or 40 weeks
			Tuition Aid	Aid for courses related to present or to future work	Permanent	Up to $200 aid is available each semester
UU	Utilities	50–99	General Interest Courses	Broaden general educational background/ General education courses	All	Evening courses offered in such areas as elementary electricity, accounting, and first aid; held once or twice a week for 2 hours for a 10-week period
			Tuition Aid	Aid for courses related to present or to future work	Permanent	50% of tuition paid by company

APPENDIX C

DIGEST OF CLERICAL TRAINING ACTIVITIES PROVIDED BY THOSE OUTSIDE AGENCIES THAT QUESTIONNAIRE RESPONDENTS REPORTED USING

Case	Outside Agency	Eligible Companies	Training Activities Provided or in Planning Stage	Eligible Clerical Employees	Description of Training Activity
AAA	Newton and Waltham Chambers of Commerce	Companies located in Newton and Waltham	One-Day Seminar	All female	One day of sessions conducted at hotel for 2 successive days by representatives from industry and education; sessions cover communications, office skills, appearance, and human relations
BBB	Katharine Gibbs Consulting Service	All	Training Consultant for Individual Companies	Varies with each company	Service was terminated in August 1963; described here because mentioned by questionnaire respondents and tends to indicate type of services companies utilize; was conducted by faculty members from Katharine Gibbs Schools on school, company, or hotel premises; programs varied in length from 2 hours to 2 days
			Preparation of Manuals	New	
			Refresher Programs	Secys, stenos	
			Secretarial Seminars	Secys	
			Two-Day Secretarial Workshops	Secys	
CCC	Industrial Education Institute	All	Technical Secretarial Program Being Planned	Stenos, secys	Program will train stenographers and secretaries for technical secretarial positions; will be conducted by experienced secretary and her boss
DDD	Mary Markulin, Training Consultant	All	Advanced Secretarial Training Conference	Potential secys, secys, supvs, emp personnel	Consultant holds a 2-day conference on secretarial procedures twice a year at a Boston hotel
			In-Plant Secretarial Training Institutes	Varies with company	Training tailored to each company's needs; conducted by consultant on company's premises
EEE	Northeastern University, Bureau of Business and Industrial Training	All	Training Consultant for Individual Companies	Varies with company	Training geared to each company's needs; conducted by Bureau's staff, subject-matter specialists, or company personnel
FFF	International Business Machines Corporation, Data Processing Division	Customers	Unit Record Equipment and Computer Courses	All*	Courses vary from 2½ to 15 days; conducted by IBM instructors at IBM; some also completed away from IBM's premises by programmed instruction

*Eligibility for various courses depends upon employee's background, ability, need for course, and/or course prerequisites.

APPENDIX C—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES PROVIDED BY THOSE OUTSIDE AGENCIES THAT QUESTIONNAIRE RESPONDENTS REPORTED USING

Case	Outside Agency	Eligible Companies	Training Activities Provided or in Planning Stage	Eligible Clerical Employees	Description of Training Activity
GGG	International Business Machines Corporation, Office Products Division	All	Typewriter Proficiency Program	Typewriter users	Program consists of 3-hour session with practice period or 1-hour session without practice period; this and the following programs conducted by IBM instructors at customer's or IBM's premises
			Secretarial Transcribing Proficiency Program	Potential secys, secys, stenos	Program consists of 2- or 3-hour session with practice period or 1-hour session without practice period; program can be tailored to meet customer's needs
			Executive Typewriter Program	Users	Program consists of 1-hour session
			Demonstration of Multi-Product Line	All	Length of session varies with situation
			Individual Operator Instruction	New IBM users	Provided with whatever training needed to learn machine(s); length of session dependent upon training needed to learn machines
HHH	New England Telephone and Telegraph Company	PBX customers	PBX Training	PBX operators	Periodic OJT by PBX instructor conducted at customer's location
		Telephone customers	Customer Consulting Service by PBX Instructors	All	One-hour session on telephone usage conducted at customer's location
		Customers with 25 or more eligible employees	Customer Consulting Service by General Consultant: Integrated Programs for Large Companies	All	Two-hour session on telephone usage conducted at customer's location followed by aid to customer in developing own program
		Customers with less than 25 eligible employees	Customer Consulting Service by General Consultant: Sessions for Small Companies	All	Personnel from several companies attend joint sessions at telephone company or at other nearby conference facilities
		All	Customer Consulting Service by General Consultant: Sessions at Group Meetings	All	Sessions included in meetings of professional associations
		Customers	Customer Consulting Service by General Consultant: Extension-User Training	All	Customer's telephone needs determined by study and implemented with training sessions held on company's premises, aids, and recommendations

APPENDIX C—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES PROVIDED BY THOSE OUTSIDE AGENCIES THAT QUESTIONNAIRE RESPONDENTS REPORTED USING

Case	Outside Agency	Eligible Companies	Training Activities Provided or in Planning Stage	Eligible Clerical Employees	Description of Training Activity
III	Boston Chapter, Inc., of American Institute of Banking	Members or eligible for membership in the American Banking Association	Orientation	New	Program consists of a 2½-hour session held weekly for 5 weeks; this and the following courses conducted at Chapter premises by bank personnel and by secondary or college teachers
			Basic Certificate Courses	All*	Courses in English, law, economics, accounting, and banking operations held 3 hours weekly for 14 weeks twice a year; may complete course requirements for each certificate or select courses independently
			Standard Certificate Courses	All*	
			Advanced Certificate Courses	All*	
			Special Courses	All	Noncertificate courses, such as public speaking, bank teller, and data processing, meet from 1½ to 3 hours for 8, 12, or 14 sessions depending on subject
			Special Courses Being Planned	Women	Courses being planned for women in all levels of banking
JJJ	Savings Banks Association of Massachusetts	Mutual savings banks	One-Day Seminar	All	Held frequently on topics of importance to bank employees; conducted by bank officers at hotel
			Supervisory Training	Selected	Two-year program consists of 2 resident sessions of 1 week each; includes directed study and case problems at supervisory level; conducted by bank officers and representatives from allied fields at hotel
			Operational Manuals	All	Manuals prepared to help bank employees perform job activities
			Assistance to Educational Banking Organizations	All	Assists with lectures, panels, and workshops held by Savings Bank Forum and by Savings Bank Women of Massachusetts
KKK	Insurance Institute, Boston University	Insurance	Instruction and Formal Course Program	Varies**	Semester courses categorized according to interests of personnel: introductory courses, special subject courses, and special examination programs
			Conference, Seminar, and Special Short-Term Programs	Varies	Included is a 2-day workshop for clerical employees employed by management personnel belonging to the Mass. Association of Insurance Agents; given to increase their knowledge of insurance; conducted annually in area by insurance personnel and university faculty members

*Eligibility for various courses depends upon employee's background, ability, need for course, and/or course prerequisites.

**Eligibility for various courses may depend upon employee's education, experience, and job responsibilities.

APPENDIX C—Continued

DIGEST OF CLERICAL TRAINING ACTIVITIES PROVIDED BY THOSE OUTSIDE AGENCIES THAT QUESTIONNAIRE RESPONDENTS REPORTED USING

Case	Outside Agency	Eligible Companies	Training Activities Provided or in Planning Stage	Eligible Clerical Employees	Description of Training Activity
LLL	National Secretaries' Association and Center for Continuing Education at Northeastern University	All	Basic Residential Seminar	Secretaries •	Seminar consists of sessions held one weekend each fall from Friday evening through Sunday noon; this and following seminars conducted by faculty at university's conference center
			Advanced Residential Seminar	Basic Seminar graduates	Seminar consists of sessions held as above seminar but in the spring
			Management Seminar	Qualified secretaries*	Seminar consists of an all-day Saturday workshop held 8 times between October and May
			Review Courses for CPS Exam	CPS candidates	Ten 2-hour sessions held from September through April for each of 3 exam sections; supervised readings and discussions provided for other exam sections; conducted by university faculty

*Limited to graduates of other seminars, or CPS secretaries, or administrative personnel with equivalent background of education and experience.

INDEX TO SELECTED CHARACTERISTICS OF CASES

Subject	Cases
Clerical Employees	
All clerical employees	G, HH, TT, UU, BBB, DDD, EEE, III, JJJ, KKK
All female employees	A, AAA, III
Business machine operators	K, O, P, Q, QQ, RR, FFF
Comptometer operators	O, P, QQ, RR
Dictaphone transcribers	K
General clerical employees	B, O, P
Key punch operators	Q, PP, FFF
Medical transcriptionists	I
New clerical employees	A, C, F, G, L, M, AA, BB, III
Permanent clerical employees	C, F, K, L, M, Q, FF, GG, AAA
Physically handicapped employees	Q
Retiring employees	Q
Secretaries, stenographers	D, E, F, G, H, J, K, L, M, N, P, Q, BB, CC, DD, EE, OO, PP, RR, SS, BBB, CCC, DDD, GGG, LLL
Tellers	II, JJ, KK, LL, MM
Telephone contact employees	L, M, NN, HHH
Telephone switchboard operators	E, HHH
Trainers	C, Q, JJJ
Typists	B, D, H, K, L, N, P, Q, QQ, BBB, GGG
Instructional Approach	
One-day program of lectures	A, D, M, AA
Meetings	E, FF, GG
Programmed instruction	BB, FFF
Series of class sessions	C, F, G, H, K, L, M, N, O, P, Q, BB, HH, MM, QQ, RR, SS, TT, UU, BBB, DDD, EEE, FFF, III, JJJ, KKK, LLL
Supervised on-the-job training combined with class sessions	
Pool training	I, J, M, PP
Rotation plan	F, L, CC
Secretarial loan-out	H, J, K, M
Understudy method	A, B, C, E, G, M, CC, EE, II, JJ, KK, LL, MM, NN, PP, CCC, HHH

INDEX TO SELECTED CHARACTERISTICS OF CASES

Subject	Cases
Vestibule training	H, I, J, N, Q, R
Workshops	E, AAA, BBB, DDD, GGG, HHH, III
Purpose of Program	
Prepare for work in the company.	A, B, C, E, F, G, H, J, K, L, M, N, P, Q, AA, BB, CC, DD, EE, II, JJ, KK, LL, MM, NN, OO, PP, QQ, RR, BBB, CCC, FFF, GGG, HHH, III
Prepare for better job performance	A, C, D, E, F, G, J, K, L, M, N, P, Q, AA, GG, FF, GG, HH, MM, RR, SS, AAA, BBB, DDD, EEE, FFF, GGG, HHH, III, JJJ, KKK, LLL
Prepare for job advancement.	G, L, N, O, P, Q, II, JJ, KK, LL, MM, QQ, RR, SS, III, JJJ
Broaden general educational background	M, TT, UU, III
Type of Program	
Orientation to company policies and procedures	A, B, C, F, G, H, I, J, K, L, M, N, AA, BB, CC, DD, EE, FF, GG, HH, II, JJ, KK, MM, NN, OO, PP, III
Skill training in:	
Business arithmetic	Q
Business English	L, N
Business letter writing	L
Business machines	J, K, O, P, Q, QQ, RR
Comptometer operation	O, P, QQ, RR
Computer operation	FFF
Customer relations techniques.	A, M, HH, II, JJ, KK, LL, MM
Insurance	KKK
Job duties and procedures.	B, C, HH, OO
Medical transcription	I
Office duties and procedures	C, D, L, FF, GG
Office relations	L
Secretarial job duties	E, F, G, H, J, K, M, N, Q, CC, DD, EE, OO
Secretarial skills	D, E, F, J, K, L, M, N, Q, OO, PP, RR, AAA, BBB, DDD, EEE, GGG, LLL
Shorthand	K, N, Q, RR, SS
Supervisory or training techniques	C. Q. JJJ
Technical typewriting and shorthand	H, J, CCC

INDEX TO SELECTED CHARACTERISTICS OF CASES

Subject	Cases
Skill training in:	
Telephone switchboard operation	E, HHH
Telephone usage	G, K, L, M, NN, HHH
Teller duties	A, II, JJ, KK, LL, MM, III
Typewriting	K, N, P, Q, QQ, RR, SS, BBB, GGG
Unit record equipment	Q, PP, FFF
General education courses	L, M, SS, TT, UU, III

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