

AN INTEGRATED PROJECT FOR AN EXECUTIVE
SECRETARY IN AN EDUCATIONAL INSTITUTION
BASED UPON A QUESTIONNAIRE ANALYSIS OF
TASKS PERFORMED

An Independent Study for the M. A. Degree
MICHIGAN STATE UNIVERSITY
CLARA SHADE DUNCAN
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by

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Business and Distributive Education

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ABSTRACT

AN INTEGRATED PROJECT FOR AN EXECUTIVE SECRETARY IN AN EDUCATIONAL INSTITUTION BASED UPON A QUESTIONNAIRE ANALYSIS OF TASKS PERFORMED

by Clara Shade Duncan

The integrated project in this study was developed to simulate the job of an executive secretary to the chairman of a department in a large university. An integrated project as defined in this study is a problem situation which requires the student to integrate skills, knowledges, and abilities previously learned in separate business courses in performing tasks in a simulated job situation.

The project was developed to give the student experience in the type of tasks that would be encountered in the job of executive secretary in a large university. The specific abilities to be developed are: following directions that are implied, determining tasks that must be done without explicit instructions, using forms and procedures unique to educational institutions. According to the objectives developed for the project, the student will be able to apply previously learned knowledges and procedures.

To ensure the relevancy of the tasks included in the project to the actual job situation, a questionnaire analysis was made. A task was determined to be relevant if at least 50 percent or more of the respondents indicated they performed the task. The questionnaire

indicated nineteen tasks that were relevant. The following tasks from the nineteen were included in the integrated project: typing correspondence from employer's handwriting, preparing travel authorizations and vouchers, composing routine correspondence, making travel arrangements and reservations, reporting absences of other clerical help, preparing labor payroll time cards, transcribing dictation from shorthand.

This project may be used in secretarial practice or office procedures classes, block-time office practice classes, or cooperative office practice related classes, as well as other types of classes depending upon the teacher's imagination.

The actions and directions to the tasks in the project are implied as much as possible, rather than stated step-by-step to the student, in order to give the student experience in ascertaining the action required from the information given.

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CHAPTER I

INTRODUCTION AND DISCUSSION OF THE PROJECT

Introduction

Business educators are stressing very strongly the need for incorporating simulation into office education programs and providing realistic experiences that relate to each student's specific career objective or goal. Teachers have come to realize that if a student is to perform successfully on the job, he must, before leaving school, see the interrelation of knowledges and skills being learned as they relate to his career choice.

Ideally, the way to accomplish this is to provide each student with cooperative work experience as a terminal experience before leaving school. For various reasons (size of community and/or school, jobs available, etc.), work experience may not be feasible for all students. Simulated experience--the next best thing to actual experience--can offer a reasonable compromise. Ogunniyi states:

The function of educational simulation is to integrate knowledges which an individual may possess and to put these knowledges into meaningful forms by presenting the learner with problem-solving situations which require the application of procedures, principles, concepts, psychomotor skills, identification, and strategies or a combination of any of these. This learning experience is a synthesis of the cognitive affective and psychomotor knowledges which an individual has previously acquired or may acquire during the simulation.¹

¹Omosho Ogunniyi, "The Methodology of Educational Simulation and Design of a Simulated Instructional Model for Occupational Education," (unpublished Ph.D. dissertation, Michigan State University, 1969), p. 156.

One way to provide for simulation in office education is through the use of "integrated projects" or "integrated exercises." The Dictionary of Education defines a project as:

A significant, practical unit of activity having educational value and aimed at one or more definite goals of understanding; involves investigation and solution of problems and frequently, the use and manipulation of physical materials; planned and carried to completion by the pupils and teacher in a natural, "real life" manner.

A simulated project or integrated project in office education therefore could be defined as a problem situation which requires the student to integrate skills, knowledges, and abilities previously learned in performing tasks in a simulated job situation, and may be designed for individual or a group. As such, it meets the criteria for both "simulation" and a "project."

With the present emphasis on career development and individualized instruction, such projects can and should relate to the student's specific career objective regardless of whether or not he happens to be one of a few students in the class with that particular career objective. His instruction should as nearly as possible be individualized to meet his specific needs and interests; however, preparation of such individual projects can be a very time-consuming and laborious task for the average classroom teacher. Consequently, there is a need for such projects geared to each student's career objective, whatever it may be, that help toward bridging the gap between the classroom and the initial job entry.

Purpose of the Study

The purpose of this study is to determine the most frequently

performed tasks of an executive secretary in an educational setting as a basis for constructing an integrated project that will simulate at least part of this particular occupation.

Assumptions

There are some secretarial tasks unique to secretaries in an educational setting as opposed to those in a business setting.

The integrated project when completed simulates actual tasks performed by an executive secretary in an educational setting.

Method and Procedure

A questionnaire was developed and administered by mail to executive secretaries of a large midwestern university of over 40,000 students and a clerical-technical staff of approximately 2,100 employees. The questionnaire was designed to obtain information concerning the kinds of tasks executive secretaries performed and with what frequency.

The analysis of the questionnaire determined the tasks used to develop the integrated project for an executive secretary in an educational setting.

Delimitations

Only those persons listed as "Executive Secretary" in the Faculty-Staff Directory of one educational institution were used in this study.

The project was not administered to a sample of the group for which it was written.

Limitations

A different method of gathering data may have resulted in more valid findings.

This study did not include any executive secretaries employed after the Directory was published and does not account for the number of questionnaires not returned because the employee had left the institution.

Definition of Terms

Integrated Project (simulated project, integrated exercise).

A problem situation which requires the student to integrate skills, knowledges, and abilities previously learned in performing tasks that simulate actual job situations. It may be for an individual or a group.

Task. A distinct major activity made up of one or more elements that requires the worker to integrate methods, procedures, techniques, and/or skills in performing logical and necessary steps.

Educational Setting. For the purpose of this study, the term educational setting will refer to a college or university.

Executive Secretary. For the purpose of this study, the title Executive Secretary will refer to an individual whose major duties are performed for one supervisor. She is responsible for carrying out minor administrative responsibilities, supervising other clerical personnel, in addition to taking and transcribing dictation.

CHAPTER II

REVIEW OF RELATED LITERATURE

The Project Method in Education

Historical overview. The project method has been used for many years in specialized forms of education particularly in the training of architects. The method can generally be said to have started in 1908 with Rufus Stimson being the first to employ the term "home project" in the agricultural courses of the Massachusetts Vocational Schools.² In addition to being used in the training of architects, business and agriculture, the project method gained momentum prior to 1918 and was used in the practical arts, home economics, and general science with supporters such as F. E. Heald, W. G. Whitman, J. F. Woodhull, W. W. Charters and Daniel Snedden contributing their particular definitions. Since the term was first used in Massachusetts, many variations of its original meaning were later applied to a variety of disciplines.

The project method, according to Hofe,³ was misused over the years, and in a distorted form, was instrumental in creating the construct commonly known as progressive education. It appeared to

²John Stevenson, Project Method of Teaching, New York: The MacMillan Company, 1922, p. 40.

³George D. Hofe, "The Project Method and Its Origin," Teachers College Record, Vol. 67 (February, 1966).

have gained popularity in part, due to the growing dissatisfaction with what was characterized as formal recitation. One of the better known "progressives" at the time, and the name most often referred to as being responsible for the project method gaining national prominence, is that of William Heard Kilpatrick. During the same period, however, Charters and Snedden also wrote extensively about the project method.⁴ Kilpatrick, however, is given credit for broadening the field for educational projects to elementary education in general. Kilpatrick, in a paper written in 1918, proposed "a philosophy of methodology broadly applicable to any subject, one defined in terms of whole-hearted, purposeful activity proceeding in a social movement and one which urged involving student interest, encouraged physical activity and pupil interaction,"⁵ Tenenbaum, in his biography of Kilpatrick, quoted him as saying:

What I was seeking. . . was a kind of education that took the person where he was, at whatever stage of development he chanced to be, and helped him to grow as an individual, as a whole person; to grow creatively along his own lines, not in any selfish or egotistical sense, but in a socially useful way, so that our whole social process could go on better. The old way of learning concentrated on books and did not involve creation; in fact, it shut creation out; it shut out emotions, feelings, hoping, ideals, attitudes; it shut out behavior, caring nothing as to whether what this individual learned got into life and changed and made better this life.⁶

⁴Milton H. Bleeke, "The Project: From a Device For Teaching to a Principle of Curriculum," (Ph.D. dissertation, Madison: University of Wisconsin, 1968).

⁵William Kilpatrick, "The Project Method," Teachers College Record, Vol. XIX, No. 4 (September, 1918), p. 320.

⁶Samuel Tenenbaum, William Heard Kilpatrick: Trail Blazer in Education, New York: Harper and Brothers Publishers, 1951, p. 140.

In 1921 with the founding of the National Conference on Educational Method and the publication of a journal under the editorship of James Hosis, the project method gained ascendancy. By 1924, Kilpatrick and Hosis, using periodical literature as the primary vehicle, urged that the project method be considered not only as a method to improve learning within a given subject, but rather as a way through which the entire curriculum could be reorganized. Correlating, fusing, and integrating subject matter through unifying activities gained the attention of educators from 1924 to 1934 and was broadly identified as the activity curriculum movement. Attempts were also made about this time to reorganize subject matter in terms of life activities as evidenced by the National Council of Teachers of English and its 1936 publication, An Experience Curriculum in English.⁷

According to Hofe⁸ Kilpatrick merely popularized an innovation introduced and developed by John Francis Woodhull. Hofe insists that Kilpatrick came to know about the project method after visiting with Woodhull. Tenenbaum states:

He was not, he frankly says, the first to use the word in connection with educational implications. An associate, Professor Woodhull, had published an article suggesting that high school boys should be assigned mechanical projects, such as wiring a house for electric bells. Kilpatrick liked this idea very much, as he thought that practical tasks assigned in school would tend to make for a more meaningful education. . . But no one used the word 'project' in philosophy or methodology or with the over-all significance that Kilpatrick did; and it can be said that in the way he conceived and proposed the 'project' with its emphasis on the purposeful act, it was altogether original and unique with him.⁹

⁷Bleeke, op. cit.

⁸Hofe, op. cit.

⁹Tenenbaum, op. cit., p. 140.

Much of the literature would appear to bear out Tenenbaum's contention. The writer wishes to note here simply that, although the literature points to Kilpatrick as the originator of the project method, other noted educators contributed to the adoption of the method by teachers. By 1938, there was powerful opposition to the project method. Teachers with vested interest in subject matter severely criticized the project method by describing it as "a 'rabbit' kind of education, with children jumping hither and yon, nibbling here and there, and never mastering anything."¹⁰ There were other attacks such as "by enthroning the child--his wishes, his desires, by making the educational process pivot around him--it had created chaos in the classroom; it had encouraged undisciplined behavior by children."¹¹ This was the beginning of the decline in popularity with project method or the Progressive Education movement. Bayles states that, not many years after publication of Kilpatrick's Foundations of Method, the term "project" declined in popularity among American educators and "has long since almost disappeared from their vocabulary. The word 'unit' now seems to have largely replaced it."¹²

Definition. Numerous writers have attempted to define what the project method is and its role in education. Many definitions have evolved, most of which tend to agree in general as to what the project method is. The term "problematic" appears frequently in these

¹⁰Tenenbaum, op. cit., p. 229.

¹¹Tenenbaum, op. cit., p. 230.

¹²Ernest E. Bayles, "Project Method in Education," Readings in Distributive Education, East Lansing: Department of Secondary Education and Curriculum, Michigan State University, 1968, p. 26.

definitions, and serves as a common construct. Heald writes that the term project "carries with it the idea of a program of importance, of some duration, and an expectation of certain tangible and valuable results."¹³

Stevenson writes that "a project is a problematic act carried to completion in its natural setting."¹⁴ He continues by explaining the definition as follows:

1. there is implied an act carried to completion as over and against the passive absorption of information;
2. there is insistence upon the problematic situation demanding reasoning rather than merely the memorizing of information;
3. by emphasizing the problematic aspect, the priority of the problem over the statement of principles is clearly implied and;
4. the natural setting of problems as contrasted with an artificial setting is explicitly stated.¹⁵

Stevenson considered the staging of a situation which leads to activity, in completing the act as over and against the passive acceptance of information, as one of the most significant contributions of the project.

If the solution is carried on in the same way in school then the problem has a 'natural setting' even though it is being solved in school. The provision for the natural setting of the teaching situation is the distinct

¹³ Ibid., p. 21.

¹⁴ John Stevenson, Project Method of Teaching, New York: The MacMillan Company, 1922, p. 43.

¹⁵ Ibid.

contribution of the project method. Without the natural setting, there is no project.¹⁶

McMurry also expresses the problematic aspect in his definition:

The project is a strongly, wisely organized body of thought focused upon an important center of practical knowledge with a definite purpose. It is the intellectual formulation and mastery of a problematic situation as a preparation for its practical execution.¹⁷

He further states that the project contains the most important elements of a standard unit of mental effort:

1. It is an important whole.
2. It is dynamic in its essential forward movement;
3. it organizes and uses knowledge on the basis of a definite purpose;
4. it sets up a series of problems requiring continuous, rational effort;
5. it works out a practical result which is embodied in a concrete object or situation in real life;
6. as an end result of the whole movement, from original conception to final objective realization, it leaves in the mind a knowledge product which serves to introduce and explain other kindred projects. It has a future as well as a past and connects up between the two. This contributes to the continuous organization of knowledge.¹⁸

As a last definition, "The term 'project' contemplates a complete act (or experience) which the agent projects, purposes, and within limits sees through to completion."¹⁹ The tasks in the projects,

¹⁶Ibid., p. 90.

¹⁷Charles A. McMurry, Teaching by Projects, New York: The MacMillan Company, 1924, p. 13.

¹⁸Ibid., p. 14.

¹⁹Stevenson, op. cit., p. 57.

therefore, should be determined by the student; it is the student who conceives, plans, and executes the tasks. This definition, as set forth by William Kilpatrick, is perhaps the one most significant to the Progressive Education movement and that later met with severe opposition; opposition from those opposed to his "pupil purposing, pupil planning, pupil executing, pupil judging" as a means or philosophy for reorganizing an entire curriculum.

Projects are used presently by teachers but they have now taken proper perspective and are used for what they are. A project is a method of instruction and not a philosophy. Bayles states:

It is not a philosophy or a program, for it seemingly suffers when stretched to include ends as well as ways and means. That, I think, is what contributed to the Progressive dilemma of seeming to tell us that pupil purposes should rule, yet all of us (including the Progressives) know that we as teachers are obligated to see that things do not get out of hand.²⁰

The Project Method in Distributive Education

Until about 1963 students in distributive education programs that were federally reimbursed received their on-the-job experience with part-time jobs with business firms. In 1963 the report of the Panel of Consultants on Vocational Education recognized the fact that cooperative distributive education programs alone could not supply enough workers in the field of distribution and marketing. At the National Clinic on Distributive Education in October 1963, John Beaumont, Director of the Distributive Education Branch, USOE, stated:

²⁰ Bayles, op. cit., p. 26.

The major concern in the past history of distributive education has been with an extension program. Instruction has been limited to employed persons. . .there is the added challenge to prepare individuals for the initial job. In this context, employment would follow education rather than as, at present, precede education.²¹

Mary V. Marks, USOE Program Specialists, at the same clinic stated:

In addition to the cooperative method of training, participation activities. . .also include group or individual projects which may be used by the instructor to encourage vocationally-centered learning. These may take place in a specially equipped classroom, in a field assignment of narrow scope, and in situations simulating experiences of varying degrees of sophistication related to employment opportunities.²²

Specifically, the passage of the Vocational Education Act of 1963 with its emphasis on preparatory education permitted the use of project instruction or the project method in distributive education. The project method of instruction in distributive education has been defined as:

Any individually designed learning activity that has a behavioral objective related to an individual's distributive occupational goal and is to be accomplished in a specified length of time; an independent activity completed in a laboratory environment.²³

The use of the term "project" itself is certainly not new to distributive education. Teachers have used for years what they considered projects, usually as a related class activity. However, the term project plan instruction as defined in 1963 is based upon the utilization by the teacher of simulated projects to be completed in

²¹Peter G. Haines, and E. T. Ferguson, Jr., "D. E." Business Education World, XLVII (October, 1966), p. 16.

²²Ibid.

²³Kay Brown, Distributive Education in the High School, USOE, Division of Vocational and Adult Education, Contract Publication, 1966.

a laboratory environment, and designed to meet the individual student's distributive occupational goal. The student completes projects which simulate as nearly as possible actual tasks he will encounter in his chosen occupation. The project method combines classroom instruction with supervised laboratory activities in a block-time approach. This method has as its purpose:

. . . to extend the capabilities of distributive education so that persons enrolled for full-time study will have ready access to an option of vocational application of instruction, through project participation, which is realistic and meaningful in light of their occupational objectives and which is suited to their needs, interests, and ability in developing employment qualifications.²⁴

The project method seeks the same learning outcomes as the cooperative method. "The means for learning have been adjusted although the outcomes sought remain identical."²⁵

Unlike the cooperative method, the project method affords the teacher-coordinator direct control of the learning situation. It requires the teacher-coordinator to plan and supervise laboratory activities assigned to individual students. This is the major difference between the project method and the cooperative method of teaching in distributive education. Marks, in discussing the differences between project and cooperative training noted:

The obvious differences between cooperative and project training coordination is that the former provides a training partner for the teacher-coordinator. There is an employer-designated contact person who assists in developing learning experiences for student-trainees. The project teacher-coordinator is the programmer of learning experiences for his student-trainees. Although

²⁴Edwin L. Nelson. "Project Training--Its Impact on Program Development," Readings in Distributive Education, Department of Secondary Education and Curriculum, Michigan State University, East Lansing, 1968.

²⁵Mary V. Marks, "Similarities and Differences in Project and Cooperative Training," Readings in Distributive Education, Department of Secondary Education and Curriculum, Michigan State University, East Lansing, 1968.

he may have the good fortune of being able to team with a cooperative teacher-coordinator or employer consultants he nonetheless serves as training sponsor and teacher-coordinator.²⁶

The project method was not meant to replace cooperative training whose value has been undisputed in training for distributive occupations. Rather it was seen as an alternative--a way to broaden the program outside the previous restrictions and make it available to more youth in light of their distributive occupational goal. Distributive education had in the past served only a very limited number of students. With the project method, the number of business firms willing to provide part-time employment is not a restriction on enrollment. Students have a choice as to either cooperative or project method in many programs, or may even participate in both plans of instruction. Buckner²⁷ in 1968 predicted that within a few years, the project plan would enroll more students than the cooperative plan. Nelson noted:

By extending the capabilities of distributive education in this manner, we make the program available to all wishing to succeed in distributive employment. We make distributive education readily accessible to those students desiring to combine instruction offered in two or more vocational areas. We make distributive education flexible in organization by reducing or extending the amount of time needed to satisfy a level of performance.²⁸
Pp. 7-8.

²⁶ Ibid.

²⁷ Leroy Buckner, "Vocational Education for Sales and Related Occupations: Projections for the Future," NBEA Yearbook, No. 6, Washington, D.C.: National Business Education Association, 1968, p. 16.

²⁸ Edwin L. Nelson, "Project Training--Its Impact on Program Development," Readings in Distributive Education, East Lansing, Michigan: Department of Secondary Education and Curriculum, Michigan State University, 1968, pp. 7-8.

By serving more youth, this method is therefore helping to meet the demand for quality manpower resources in the fields of distribution and marketing.

While we find limitations in labor market breakdowns, we can place some confidence in the assumption that about 30 percent of the labor force is engaged in distributive occupations. This figure is supported by State surveys, interpretations of labor figures, and related descriptive material. . . . Project training gives us the necessary flexibility so that we can be more responsive to the total manpower needs in distribution. If distributive education is to be the natural roadway for those entering the field, it would appear that project training could be the vehicle for as many as 60 to 70 percent of the next decade's projected annual enrollment of 550,000.²⁹

The utilization of the project method in Distributive Education has been slow in gaining acceptance. Sampson asserts:

The proven success of cooperative training has not encouraged changes in ongoing programs, and thus most project training has been initiated because of program expansion.³⁰

There has been very little research on project instruction in D. E. possibly because of limited populations for study. In December 1968, Wallace conducted a survey of state supervisors of distributive education to assess the status and development of high school distributive education block-time instruction. "The project method was used to identify block-time instruction in distributive education."³¹ Fourteen states reported having at least one distributive education

²⁹ Ibid.

³⁰ Harland Sampson, "The Teaching of Distributive Education," NBEA Yearbook, No. 9, Washington, D. C.: National Business Education Association, 1971, p. 82.

³¹ Ibid.

block-time project plan program. Seventy-one percent indicated the main value of the project method is "as a substitute for the co-op method where adequate training stations are not available."³²

Summary. The basic difference between the project method in general education and the method as used in distributive education is that the latter is individually tailored to fit the student's particular occupational goal.

Kilpatrick, as discussed earlier, believed that the students themselves should determine the projects which they desired to complete. However, in distributive education, the teacher for the most part selects the types of projects that will prepare the student most effectively for his individual distributive occupational goal. The teacher is responsible for providing projects that are representative of the actual tasks the student will be required to perform in the actual job situation. "Students do not always possess sufficient knowledge and understanding to determine and follow through on a project that would provide meaningful activities of educational value."³³ Regardless of these minor differences distributive education can make effective use of the project method. Bayles noted:

The point in theory seems to be that teachers have to have a basic, overall educational purpose; one that is clearly formulated, consistently followed, and can be explained and defended when needful. Then, and only then, can any method be judged as applicable or not

³²Ibid.

³³Gilbert Chancey, "The Project Method in Distributive Education," Balance Sheet, Vol. 50 (November, 1968), p. 101.

applicable in particular cases and, if applicable, put to work with successful results. Project method is a method; not a philosophy.³⁴

The Integrated Method in Office Education

In recent years much emphasis has been placed on providing for simulation in office education. It is viewed as an effective means of helping students to bridge the gap between school and the initial job entry. There are certain assumptions about learning implied in the use of simulations. One implication is that people learn not by being taught, but by acting, and then learning from the consequences of that action. Another implication is that "variations in learning are less dependent on variations in the quality of the teacher than upon the way in which the activity of learning is structured, in particular upon the kinds of actions the learners take and the kind of feedback they get from these actions."³⁵ Simulation implies a sequence of learning in which understanding follows ability to perform rather than preceding it. For example, a student may learn to perform very well in a given capacity yet not be able to verbalize what elements go into his action.³⁶

A simulation activity, as used in instruction, is a re-creation of some aspect of reality in which students participate as part of the simulation of reality. Poland discusses the concept of simulation

³⁴Bayles. op. cit.

³⁵James S. Coleman, "The Role of Modern Technology in Relation to Simulation and Games for Learning," To Improve Learning, Sidney Tickton (ed.), New York: R. R. Bowker Company, 1970, p. 185.

³⁶Ibid.

in office education:

The concept of simulation is based on the psychological premise that identical elements in two situations will provide for links in action by the individual who experiences both situations. Knowledges, skills, and attitudes which are encountered and learned in one situation will have a tendency to reassert themselves whenever enough elements of that situation occur again. When transfer of learning is the basis on which learning is to be constructed, as in the simulation approach, then the teacher tries to create situations in which the student will be expected to perform the skills. Thus meaningful practice will have contributed to greater learning. This occurs as students participate in simulated office situations which involve demonstration of the skills they have learned and application of formal knowledge to individualized problems which have to be solved before work moves ahead.³⁷

Simulation in Business and Office Education can be implemented in many ways. The integrated project method is one instructional technique that can be used in office education to provide for simulation. The term "integrated project" (also integrated exercise, simulated project) as used in Business Office education is very much similar to the project method in Distributive Education. An integrated project as used in office education can be defined as a problem situation which requires the student to integrate skills, knowledges, and abilities previously learned in separate business courses in performing tasks in a simulated job situation. The project is designed to meet the individual's specific career objective or goal, as is the project method in Distributive Education. The project method in Distributive Education, however, differs from the integrated project in office education in that the latter is based

³⁷Robert Poland, "Typewriting Instruction in a Simulated Office Class," Business Education Forum, Vol. 26 (January 1972), p. 35.

upon providing a situation or project that requires the student to integrate knowledges and skills previously learned in separate business courses. Emphasis is on a "tying together" of isolated subject matter by simulating an actual job situation which requires the student to perform certain tasks using those knowledges and skills previously acquired. Sawaia states:

By using integrated and simulated projects, students are provided the opportunity to experience realistic office procedures. Simulated office activities also permit consolidation and maintenance of previously learned skills for initial job entry. An additional advantage to this type of instruction is that it provides a means for realistic assessment of the student's skill proficiency and knowledge acquisitions.³⁸

Business educators are continually stressing the need for instruction to be geared to each student's specific career goal; therefore, teachers must seek and utilize methods that can provide for individualization of instruction. The integrated project is an ideal way to provide for individualized instruction while at the same time providing for simulation in the instructional program. Fruehling in discussing the clerical curriculum predicted:

The clerical curriculum of the future will increasingly rely on individualized, self-paced instruction. . . there is much to be gained by letting each student develop skill at his own rate and proceed through a series of job training sequences that best suit his evolving interests and abilities. Skills and concepts that have been previously taught in isolation will now be taught in integrated fashion, to prepare the students for the integrated patterns of activity he will encounter in the job.³⁹

³⁸Josephine Sawaia, "Block-Time Approach Meets Student Needs," Business Education Forum, Vol. 24 (February, 1970), p. 10.

³⁹Donald Fruehling, "The Clerical Curriculum of the Future," Business Education Forum, Vol. 25 (February, 1971), p. 21.

Schroeder and Danford list individualization of learning experiences as one of the fundamentals essential in the career ladder concept which focuses on the career goal of the student and his performance in meeting his objective.

. . . learning experiences must be individualized so that he will achieve his maximum capability during the time he is enrolled in the program. . . Fundamentally, each student is on his own path to a career thus necessitating a personalized instructional program designed specifically for him.⁴⁰

Jones also asserts that the student:

. . . must be given the opportunity to pursue the kind of a program of instruction that will enable him to progress from his own beginning learning level to that level of accomplishment which will enable him to obtain employment and successfully work in an occupation related directly to his career objective.⁴¹

The integrated project method is one way to provide for individualized instruction. Wagner states that by using the project method, "students can work at their own pace, one of the major advantages of programmed instruction."⁴² The teacher can design integrated exercises or projects from simple to complex that would enable a student to move from where he is to where he wishes his instruction to take him, i.e., the level of accomplishment he is capable of obtaining.

⁴⁰Betty Schroeder and Janice Danford, "Open Entry and Open Exit as Clerical Goals," Business Education Forum, Vol. 26 (February, 1972), p. 12.

⁴¹Adaline Jones, "The Enigmatic D. E. Project Plan Laboratory," Business Education Forum, Vol. 25 (February, 1971), p. 54.

⁴²Lana G. Wagner, "An Integrated Project Involving Low-Ability Students and Underachievers in the Operation of a Retail Store, A Wholesale House, and a Bank (unpublished Independent Study, East Lansing: Michigan State University, 1969), p. 5.

The particular classes in which teachers may use integrated projects are as numerous as the teacher's imagination will permit. The literature suggests several classes in which teachers might make use of the integrated project method.

Office Practice. Traditionally, office practice has utilized the rotation method, specifically for teaching office machines. However, the rotation method does not allow for individual differences of varying abilities. Some students need a longer period on certain units than others; some require a shorter length of time. "The ritualistic rotation plan has usually compartmentalized rather than integrated office practice learning experiences."⁴³

It is obvious that much knowledge and skill can be developed through the use of either the battery or rotation plan, but the knowledge and skill is presented in an isolated, task-by-task way. . . . Each task or unit is covered step-by-step; then a new unit is covered, and the process is repeated over and over.⁴⁴

The student is not given the opportunity to see the interrelation of the skills and knowledges that he is learning. He must be made aware of this interrelation while a student, and this can be achieved in the clerical office practice class through the use of integrated exercises and projects.

Moskovis sees the use of integrated exercises in clerical office practice as a way to compensate for what he considers disadvantages in the model office plan:

⁴³Michael Moskovis, "Three Aspects of Office Practice: An Integrated Approach to Office Practice," Business Education World, Vol. 49 (March 1969), p. 14.

⁴⁴Elizabeth Cress, "Developing Guidelines for Integrated Office Procedures," Business Education Forum, Vol. 25 (March 1971), p. 26.

Although the model office organization plan seems the ideal instructional device, most plans require considerable class time and entail far too many repetitious and monotonous tasks. . . integrated exercises make possible an early synthesis of the various classroom experiences. Because the exercises are completed in two or three class periods, student interest remains high. And because each student works independently, effective classroom control and objective student evaluation are possible.⁴⁵

Those who do not necessarily share Moskovich's view may consider the use of integrated exercises with a model office plan. Some students because of personal characteristics may not be interested in, nor capable of, filling all the positions in the model office simulation. If the model office runs for part of the year, perhaps after occupying their particular position for the assigned length of time, the students could work individually on a series of integrated exercises geared to their particular occupational objectives. The students could, before the model office simulation, work on integrated exercises which could enable them to perform more effectively while in the model office. On the other hand, perhaps the performance of a student in the model office indicated certain problems that could be dealt with by providing the student with an individual integrated project designed specifically to deal with his needs.

Block-time Approach. The integrated project can be used effectively as one instructional technique that can provide for simulation in the block-time approach to office practice, or block-time scheduling for integrating other subjects as well. Poland and Haines, in a study of a block-time schedule for teaching vocational office practice,

⁴⁵ Moskovich, op. cit., p. 14.

stated that "The approach of regular drill and practice is replaced by integrated task practice, simulation and individualized instruction based on defined career goals."⁴⁶ The ultimate objectives of the study were to improve education for employment and to integrate learning experiences for the students based, whenever possible, on "environmental situations simulating employment conditions."⁴⁷ Among the materials that were developed for instructional use were integrated exercises. Poland and Haines stated as their personal interpretation:

From this project has come the thought on the part of many people that instructional objectives must be more carefully defined and that instruction more carefully tailored. There appears to be many efforts in this direction including the definition of job training sequences and the integrated exercises and simulations which relate to these. Also underway is the work by local teachers to build such instructional materials.⁴⁸

Typewriting. Integrated exercises can be used in typewriting instruction in a simulated office class. Poland⁴⁹ states that there are three distinct areas of instruction in typewriting in a simulated office class: remedial and skill development, task simulation, and job simulation. In stage two, task simulation, the student brings together previously learned typewriting skills and knowledges to perform tasks he would be expected to perform on the job:

⁴⁶Robert Poland and Peter Haines, "Final Report - A Study of a Block-Time Schedule for Teaching Vocational Office Practice," East Lansing: Michigan State University, July, 1969.

⁴⁷Ibid.

⁴⁸Ibid.

⁴⁹Robert Poland, "Typewriting Instruction in a Simulated Office Class," Business Education Forum, Vol. 26 (January, 1972), pp. 35-37.

During this second stage, many instructors use the integrated exercise, a teaching device whereby a student is given a task or series of tasks for a given situation and is expected to perform them as though he were in a real office. The integrated exercise does not introduce new material, but permits the student to draw on his previously learned skills and knowledges to perform the task or tasks.⁵⁰

In the second stage, task simulation, the instructional plan must insure:

1. Clarification of procedures for doing the task.
2. An awareness that skills essential for performing the task were completed earlier.
3. Breaking down of all the elements of the task, so that the learner can identify the specific type-writing activities.
4. An awareness that conceptional knowledge of the task or activities has been developed.
5. Provision for individual performance.
6. Follow-up and evaluation.⁵¹

Rather than performing isolated tasks, the student is given an opportunity to experience the situation in which he is to perform the task. "Through the use of integrated exercises the student is provided a situation which he can structure--the opportunity to pose alternatives and to follow them up."⁵² Poland suggests that stage two, task simulation, occurs throughout the school year.

General guidelines for developing an integrated project. "The linking together of skills in the classroom will better prepare the

⁵⁰ Ibid.

⁵¹ Ibid.

⁵² Ibid.

student to meet the demands of the actual business world."⁵³ The integrated project method can afford the teacher a means for helping to prepare the student to meet these demands. However, the development of an integrated project or exercise does require a great deal of time and effort on the part of the teacher. There are few available commercially. Even if more were available commercially, they might not necessarily meet each teacher's individual needs and objectives of his students. Obviously, the teacher is better able to prepare projects and exercises that will best meet the needs of his particular students.

There are certain points that the classroom teacher should consider when attempting to develop his own integrated project. He should keep in mind that the projects can be as simple or as complex as he desires. They may be developed for an individual student or a group of students. They may be designed to be completed in a single class period or several class periods. They can be utilized in separate business courses by allowing the teacher to stop at any point in instruction and integrate previously learned knowledges and skills in the form of an integrated exercise. After covering certain units, the students could complete an integrated exercise covering the knowledges and skills just learned in those units. Students do not have to wait until their twelfth year in cooperative office practice to begin to see the interrelation of knowledges and skills they are learning. A great advantage to the teacher of the integrated project is that it can be used regardless of the limited facilities. Many

⁵³Cress, op. cit., p.

times present facilities can provide students the opportunity to work with such projects with few, if any, adjustments to the present classroom.

When developing a project, the teacher should take note of the following guidelines:

1. Projects should be meaningful and be within the student's capabilities of accomplishment.
2. Projects must be designed so they fit each student's level of motivation and maturity.
3. Each project should be an integrated experience whereby each element interacts upon other elements of the curriculum.
4. Projects should be allied to student's prior education.
5. Projects should be realistic and life related.
6. Projects should be applicable to the learnings to be obtained and the relevance and applicability should be obvious to each student.
7. Project assignment must be appropriate for each student and his occupational objectives.
8. Projects should be so designed that students will be able to bring them to favorable conclusions.
9. Project accomplishment should not be teacher-dominated. The teacher should not provide so much assistance that the students do not have to perform adequately.⁵⁴

Specifically, the teacher should consider the following questions:

1. What units of study will have to be covered before assigning the exercise?
2. What skills are to be developed?
3. What reference materials, forms, and other supplies are needed?

⁵⁴ Gilbert Chancey, "The Project Method in Distributive Education," Balance Sheet, Vol. 50 (November 1968), p. 102.

4. What standards should be used for evaluation?
5. What measures should be taken to allow for individual differences?
6. What amount of time should be allowed for the completion of the exercise?⁵⁵

The teacher must be careful to insure that two factors are present when developing the integrated project:

1. relevance of the task or tasks to real office demands, and
2. situational equivalence, i.e., the extent to which the task in the learning situation is or appears real to the learner. Thus the tasks must have some relevance to real or actual situations.⁵⁶

The classroom teacher can insure the presence of these two factors in many cases from his own actual job experience if fairly recent or through job analysis in the local community.

Constructing the situation which sets the "stage" or background for the tasks that are to be performed in the project is very important. The situation should as nearly as possible represent a realistic work situation, as the tasks must appear real to the student in the situation in which he is to perform them. Avoid using names of people and titles of companies that detract from the realism, such as "Bonnie Bookkeeper," and "The XYZ Company." For some students this may be his last opportunity before leaving school to apply knowledges and skills he has learned to relevant tasks, so the situation and tasks should appear as real as the teacher can make them.

Because the objective of the integrated project is to integrate

⁵⁵Elizabeth Cress, "Developing Guidelines for Integrated Office Procedures," Business Education Forum, Vol. 25 (March 1971), p.

⁵⁶Poland, op. cit., p. 35.

knowledges and skills previously learned in a simulated manner, the teacher should not present new knowledges and skills. The student should be aware that "skills essential for performing the tasks were completed earlier."⁵⁷

Finally, the teacher should remember that no one single approach in the classroom can effectively meet the needs of every student in the classroom, because students have varying abilities and needs. The teacher must experiment with the integrated project method in order to determine if it can effectively meet the needs of his students.

While many approaches in classroom teaching procedures will produce equally good results, the teacher should experiment to find which techniques are especially suitable to his personality and individual interests of his students. No one method or device should be used excessively. However, by varying the approach in the classroom, the teacher can be sure that the sessions will be more interesting and valuable for the students. Variety in teaching methods also makes class presentation more interesting for the teacher.⁵⁸

⁵⁷Poland, op. cit., p. 38.

⁵⁸Reno S. Knouse, "Innovations in Distributive Education-- Planning to Teach," Business Education Forum, Vol. 21 (April 1967), p. 6.

CHAPTER III

ANALYSIS OF QUESTIONNAIRE

A total of 150 questionnaires were sent to persons listed as "Executive Secretary" in the Faculty-Staff Directory for 1971-72 of a large midwestern university. Only 114 or 76 percent were returned. The respondents were asked to indicate the frequency with which they performed certain tasks by the following: A (constantly), B (frequently), C (occasionally), D (practically never), and E (never). Table I gives a breakdown of the responses for each task by number and percentage.

Determination of Relevant Tasks

Table II was developed in order to determine which tasks should be considered relevant to develop the integrated project. It was decided that the percentages of the responses under A and B (constantly and frequently) would be combined; these combined percentages were then ranked beginning with the highest combined response. A task was determined to be relevant if at least fifty percent or more of the respondents indicated they performed the task. Table II revealed that nineteen tasks out of a list of 27 (plus write-in's) received at least fifty percent or more of the responses. The tasks included in the integrated project were selected from the nineteen tasks in Table II.

Other Implications

The respondents were asked to write in any relevant task they performed that was not listed. Forty-four or 39 percent of the

TABLE I

AN ANALYSIS OF THE FREQUENCY WITH WHICH EXECUTIVE SECRETARIES PERFORMED CERTAIN TASKS

Tasks Performed	A Constantly		B Frequently		C Occasionally		D Practically Never		E Never	
	No.	%	No.	%	No.	%	No.	%	No.	%
Schedule meetings	27	24	57	50	25	22	2	2	3	2
Arrange luncheons and receptions	5	4	28	25	38	33	28	25	15	13
Schedule appointments	78	68	20	18	13	11	2	2	1	1
Schedule and request room for lectures and other occasional uses	19	17	34	30	34	30	18	16	9	7
Make travel arrangements, reservations	25	22	46	40	24	21	10	9	9	8
Supervise other clerical help including students	59	52	21	18	16	14	5	4	13	12
Report absences of other clerical help to personnel office	56	49	11	9	10	9	10	9	27	24
Prepare labor and student payroll time cards	44	39	19	16	10	9	13	11	23	25
Keep personnel records on faculty and other personnel	64	56	9	8	8	7	8	7	25	22
Record minutes of staff meetings	15	13	11	9	11	9	15	13	62	56
Compose routine correspondence	31	28	45	39	32	28	5	4	1	1
Prepare travel authorizations and travel vouchers	52	46	36	32	20	17	4	3	2	2
Type course outlines for faculty	8	7	17	15	30	26	20	17	39	35

Take dictation in shorthand	29	25	33	29	27	24	7	6	18	16
Transcribe dictation from voice recordings	16	14	24	21	17	15	13	11	44	39
Type correspondence, reports, etc. from employer's handwriting	52	46	45	39	14	13	3	2	0	0
Mark correspondence for filing but does not file	19	17	13	11	19	17	11	9	52	42
File correspondence	65	57	24	22	18	16	4	3	3	2
Locate and attach appropriate file to correspondence to be answered by employer	46	41	35	31	20	17	8	7	5	4
Sort and open all incoming mail entering unit or department	41	36	7	6	23	20	15	13	29	25
Sort and open all incoming mail of immediate employer	79	70	4	3	6	5	3	2	22	20
Answer all incoming calls and route calls to appropriate individuals	37	33	15	13	30	26	16	14	16	14
Answer only those calls routed directly to you	86	76	8	7	5	4	3	2	12	11
Greet visitors	71	62	30	26	12	11	1	1	0	0
Contact with students	51	45	42	37	14	13	4	3	3	2
Contact with faculty	72	63	27	24	11	9	2	2	2	2
Contact other departments for data for special reports	25	22	38	33	37	33	8	7	6	5

TABLE II
RELEVANT TASKS AS DETERMINED BY
THE COMBINED PERCENTAGES OF A AND B

Tasks Performed	Percentages A and B
Greet visitors	88
Contact with faculty	87
Schedule appointments	86
*Type correspondence, reports, manuscripts, etc. from employer's handwriting	85
Answer only those phone calls routed directly to you	83
Contact with students	82
File correspondence	79
*Prepare travel authorizations and vouchers	78
Schedule meetings	74
Sort and open only incoming mail of immediate boss	73
Locate and attach appropriate file to correspondence to be answered by employer	72
Supervise other clerical help including students	70
*Compose routine correspondence	67
Keep personnel records on faculty and other personnel	64
*Make travel arrangements, reservations	62
*Report absences of other clerical help to personnel office	58
*Prepare labor and student payroll time cards	55
Contact other departments for data for special reports	55
*Take dictation in shorthand	54

*Tasks included in the integrated project

respondents indicated they handled all or certain aspects of the department bookkeeping. Thirty-seven or 33 percent indicated that they handled all the requisitioning of supplies for the department. These two responses indicated that perhaps they should have been written into the questionnaire.

SUMMARY

Chapter III summarizes the information needed to begin writing the integrated project. The tasks selected for inclusion in some form in the project were: typing correspondence from employer's handwriting, preparing travel authorizations and vouchers, composing routine correspondence, making travel arrangements and reservations, reporting absences of other clerical help, preparing labor payroll time cards, taking dictation in shorthand. These tasks were selected from a possible list of nineteen that were determined to be relevant tasks.

CHAPTER IV

THE PROJECT

Introduction

The integrated project in this study was developed to simulate the job of an executive secretary to the chairman of a department in a large university. The questionnaire and analysis of tasks indicated nineteen tasks that were frequently performed by executive secretaries. The project consists of seven of those tasks and was designed for a student with the career objective of executive secretary in an educational institution.

The actions and directions to the tasks in the project to be completed are implied as much as possible, rather than stated step-by-step to the student, in order to give the student experience in ascertaining the action required from the information given.

Type of Classes

This project may be used in secretarial practice or office procedures classes, block-time office practice classes, or cooperative office education related classes.

Objectives

The project was developed to give the student experience in the type of tasks that would be encountered in the job of executive secretary in a large university. The specific abilities to be developed are:

1. following directions that are implied;
2. determining tasks that must be done without explicit instructions;
3. using forms and procedures unique to educational institutions.

Behavioral Objectives

The following behavioral objectives were defined for this project:

1. Given a partially filled Time Record Sheet for each employee and background information, the student will enter the appropriate information for the current pay period on the Time Record Sheet, and prepare the Daily Time Record card for each employee.
2. Given the dates of absence, the student will prepare the appropriate form for each employee for reporting absences to the personnel office.
3. Given a letter in shorthand, the student will transcribe the letter with 100 percent accuracy.
4. Given background information and flight schedule, the student will write two letters requesting room reservations for the appropriate number of nights.
5. Given the necessary information, the student will prepare a Direct Payment Voucher for an honorarium payment to a guest lecturer with 100 percent accuracy.
6. Given the necessary information, the student will prepare a travel authorization for her employer's signature with 100 percent accuracy.
7. Given a letter containing background information, the student will compose a reply.
8. Given a letter in the employer's handwriting, the student will type the letter in mailable form with 100 percent accuracy.
9. Given a series of tasks, the student will sign her name and title or her employer's signature when appropriate.

Student Competencies

Before attempting this project, the student should have some previous experience with integrated projects. Specifically, the student should possess the following knowledges and skills:

1. Ability to type printed forms.
2. Ability to follow written instructions.
3. Ability to read shorthand.
4. Ability in composing correspondence from general instructions.
5. Ability to operate ten-key adding machine.
6. Ability in typing mailable letters in any acceptable form with carbon copies and envelopes.

Time Involved

This project should take approximately five to six hours for completion.

Supplies and Equipment Needed

The student will need the following special materials and equipment to complete this project:

1. At least three Daily Time Record cards.
2. At least three Report of Absences forms.
3. At least three partially filled individual Time Record sheets.
4. At least one Travel Authorization form.
5. At least one Direct Payment Voucher form.
6. Letterhead paper and envelopes, onionskin, and carbon paper.
7. A ten-key adding machine.

Suggested Evaluation

The student's evaluation should be based on the concept of mailability; however, the total evaluation should be made in light of the student's individual ability and the progress made toward preparing for his career objective on this particular project as compared with previous class experiences.

CHAPTER V

SUMMARY

The integrated project in office education as used in this study was defined as a problem situation which requires the student to integrate skills, knowledges, and abilities previously learned in separate business courses in performing tasks in a simulated job situation. The integrated project can be a valuable method of instruction for providing for simulation in office education. Simulation is important in helping to bridge the gap between school and the initial job entry; consequently, business educators are stressing the need for teachers to simulate. The integrated project provides for the function of simulation in office education as stated by Ogunniyi:

. . . to integrate knowledges which an individual may possess and to put these knowledges into meaningful forms by presenting the learner with problem-solving situations which require the application of procedures, principles, concepts, psychomotor skills. . .

There is also the continued emphasis by business educators on providing instruction for each student based upon his individual career goal; there is a need, therefore, for teaching methods that can provide for individualization of instruction. The integrated project can be designed to simulate the tasks involved in whatever occupation a student chooses; he can progress from his own beginning level to the level needed to secure employment in his chosen occupation through the use of such individual projects.

1

Developing integrated projects geared to the student's career objective can be a laborious and time-consuming task for the average classroom teacher; consequently, there is a need for projects that the classroom teacher can utilize. This study was undertaken to write such a project--an individual integrated project designed for the student with the career objective of executive secretary in an educational institution. A questionnaire analysis was made to ensure the relevancy of the tasks included in the project to the actual job situation. A task was determined to be relevant if at least 50 percent or more of the respondents indicated they performed the task. The questionnaire indicated nineteen tasks that were relevant. The following tasks from the nineteen were included in the integrated project: typing correspondence from employer's handwriting, preparing travel authorizations and vouchers, composing routine correspondence, making travel arrangements and reservations, reporting absences of other clerical help, preparing labor payroll time cards, transcribing dictation from shorthand.

This project may be used in secretarial practice or office procedures classes, block-time office practice classes, or cooperative office practice related classes, as well as other types of classes depending upon the teacher's imagination. The ultimate objective of the project was to give the student experience in the type of tasks that would be encountered in the job of executive secretary in a large university. The writer attempted as much as possible to avoid stating directly the tasks to be performed in order to develop the following specific abilities: following directions that are implied, and determining tasks that must be done without explicit instructions.

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APPENDICES

APPENDIX A
SAMPLE QUESTIONNAIRE

QUESTIONNAIRE

Please indicate how often you perform the duties listed below by the following letters: A (constantly), B (frequently), C (occasionally), D (practically never), E (never)

Indicate the priority of each item by the following numbers:

1 (immediately), 2 (as soon as possible), 3 (as time permits)

At the bottom, space is provided for you to write in any duties that were not listed that you perform.

	<u>Frequency</u>	<u>Priority</u>
1. Schedule meetings	1. _____	_____
2. Arrange luncheons and receptions	2. _____	_____
3. Schedule appointments	3. _____	_____
4. Schedule and request rooms for lectures and other occasional uses.	4. _____	_____
5. Make travel arrangements, reservations, etc.	5. _____	_____
6. Supervise other clerical help (including students)	6. _____	_____
7. Report absences of other clerical help to personnel office	7. _____	_____
8. Prepare labor and student payroll time cards	8. _____	_____
9. Keep personnel records on faculty and other personnel	9. _____	_____
10. Record minutes of staff meetings	10. _____	_____
11. Compose routine correspondence	11. _____	_____
12. Prepare travel authorizations and travel vouchers	12. _____	_____
13. Type course outlines for faculty members	13. _____	_____
14. Take dictation in shorthand	14. _____	_____
15. Transcribe dictation from voice recordings	15. _____	_____
16. Type correspondence, reports, etc. from Boss' handwriting	16. _____	_____
17. Mark correspondence for filing but does not file	17. _____	_____
18. File correspondence	18. _____	_____
19. Locate and attach appropriate file to correspondence to be answered by employer	19. _____	_____
20. Sort and open all incoming mail entering unit or dept.	20. _____	_____
21. Sort and open <u>only</u> incoming mail of immediate Boss	21. _____	_____
22. Answer all incoming calls and route calls to appropriate individuals	22. _____	_____
23. Answer only those calls routed directly to you	23. _____	_____
24. Greet visitors	24. _____	_____
25. Contact with students	25. _____	_____
26. Contact with faculty	26. _____	_____
27. Contact other departments for data for special reports	27. _____	_____
28. _____	28. _____	_____
29. _____	29. _____	_____

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APPENDIX B
INTEGRATED PROJECT

EXECUTIVE SECRETARY IN A LARGE UNIVERSITY

I N T E G R A T E D P R O J E C T
EXECUTIVE SECRETARY IN A LARGE UNIVERSITY

May 197_						
S	M	T	W	TH	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June 197_						
S	M	T	W	TH	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Situation

You are employed as Executive Secretary to Dr. Benjamin Kofi, Chairman of the Department of African and Afro-American Studies at Northern Central University, Lansing, Michigan 48821. The Department address is 120 Harbarger Hall, telephone 344-1800. The Department is a unit within the College of International Programs and Studies at 135 Duke Hall. You supervise three department clerks: Doris Williams (Clerk III), Janice Snowden (Principal Clerk VI), and Anita Patrick (Clerk IV).

Today is Monday, May 22. It is your first day back after being ill Thursday and Friday of last week. You learn that Janice was ill Thursday and Friday also. Doris was ill on Tuesday of last week. Dr. Kofi, your employer, will not be in this morning as he is on his way to lecture at another university and will not be back in the office until tomorrow morning. He has left several items in a folder in the middle of your desk.

Background Information

Your department has two major sources of funds:

1. The College of International Programs and Studies, Account No. 11-3722, which covers all salaries: labor payroll, salary payroll, and faculty payroll;
2. United States Office of Education grant (abbreviated USOE), Account No. 74-4702, which covers all other disbursements connected with the normal operation of the department.

All disbursements from either account must be countersigned by the Dean of the College of International Programs and Studies.

You are authorized to sign your name in the absence of your employer for disbursements from both accounts that cannot wait until his return. However, as a matter of routine, you always sign such items as labor payroll Daily Time Record cards, personnel absences (including your own), and frequently honorariums.

Your employer wishes you to answer all routine correspondence that he gives you using your name and title (Executive Secretary to Dr. Kofi) unless he specifically asked you to compose a letter for his signature.

The labor payroll is prepared for those employees paid by an hourly wage. When an employee on the labor payroll is absent and has sick leave to cover the absence, the employee is paid for that day and "8⁵" is entered on the Time Record Sheet. If the employee does not have sick leave to cover the absence, she is not paid for that day and "0" hours is entered. If she worked part of the day, the actual number of hours she worked is entered on the Time Record sheet. When preparing the labor payroll, the Time Record sheet is filled in first for each employee, and then a Daily Time Record card is prepared.

Honorariums for lectures are paid by a Direct Payment Voucher
Instructions

Folder No. 1 contains the messages left you by your employer. You should read through the entire folder before doing anything to see what is required of you. In addition to whatever your employer has left for you, there are certain routine tasks that must be done today. Your absences and the absences of the other girls must be reported to the Personnel Office (including the absence of Doris last Tuesday that you omitted to send in on Wednesday). The labor payroll for Doris, Janice, and Anita is due today. This payroll will cover the previous two-week pay period. A check on sick leave reveals that Doris has used up all of her accumulated sick leave. Folder No. 2 contains the necessary information for preparing the labor payroll. There is also included a page from your shorthand pad that was not transcribed before you left on Wednesday of last week.

Only type envelopes for those items that will be mailed outside the campus. Interoffice envelopes are ordinarily used for mail to other units on the campus, but we will omit them in this exercise.

Your instructor will assume the roles of your employer and the Dean of the College of International Programs and Studies. PRESENT ALL WORK TO YOUR INSTRUCTOR WHEN COMPLETED.

Supplies and Equipment Needed

1. At least three Daily Time Record cards.
2. At least three Report of Absences forms.
3. At least three partially filled individual Time Record sheets.
4. At least one travel authorization form.

5. At least one Direct Payment Voucher form.
6. Letterhead paper and envelopes, onionskin, and carbon paper.
7. A ten-key adding machine.

FOLDER NO. 1

LEFT BY YOUR EMPLOYER

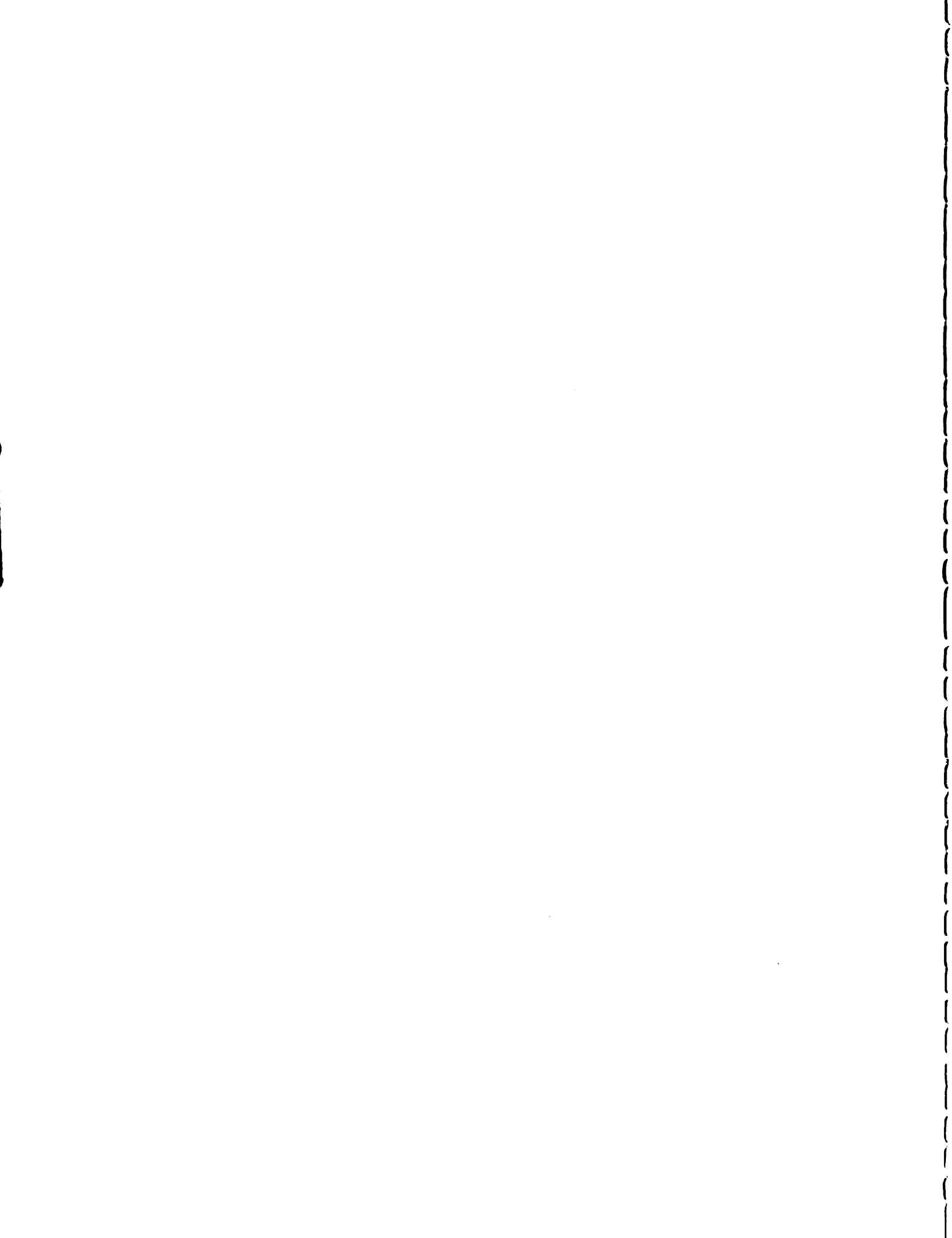
Miss _____.

What about my letter
to Adjigibie? Sign and
send airmail, special
delivery.

Make out voucher for
honorarium so he can
have check when he
comes on the 29th.

His S. S. No. 237-74-9918
Home address:

122 East 13th Street
Amherst, Mass. 60174



Dr. David Njeunda, Chairman
Department of African Languages and Literature
University of Wisconsin
Madison, Wisconsin 53706

Dear Dave

Many thanks for your recent letter and the invitation to lecture in your department. I have been looking for an opportunity to come your way ever since your return from Ghana and your subsequent appointment as Chairman of the department. My sincere congratulations on your appointment; ~~you deserved it more than anyone.~~

~~Of the dates you mentioned, June 2 seems to be the best date at this time.~~ I can't see the possibility of any time earlier.

Will you be attending the meeting of ~~the~~ ~~African Studies Program~~ in Gainesville on June 30? I hope so, Dave; there will be quite a ~~number of~~ ^{few} people there I would like you to meet. I will talk to you further about this. I look forward to seeing you again.
Best wishes.

Yours sincerely,

Sign and send
out today

CENTER FOR AFRICAN STUDIES

FLORIDA STATE UNIVERSITY

GAINESVILLE, FLORIDA 32601

OFFICE OF THE DIRECTOR
470 GRADUATE AND
INTERNATIONAL STUDIES BUILDING

May 16, 1972

Dr. Benjamin Kofi, Chairman
Department of African and Afro-American Studies
120 Harbarger Hall
Northern Central University
Lansing, Michigan 48821

Dear Dr. Kofi:

Thank you for your response to my letter of January 25, 1972, asking you to indicate preferences as to the dates for the spring conference of the Directors of African Studies to be held on our campus this year.

After tallying your replies and checking the motel and meeting room situation here, we have decided that June 30 and July 1 would be the best dates to hold the meetings. We have reserved space in our Union Building for the meetings beginning at 9:00 a.m. on Friday, June 30 through Saturday noon, July 1.

Many of the hotels are already booked, so please make your reservations as soon as possible. We have competition on those dates (as any other!) for both motel and airline space. Make your reservations directly with the motel of your choice early and let us know where you are staying if possible. (The closest motels that are still available are the Holiday Inn, 640 Grant Street, and the University Inn, 449 Gastonia Avenue.) Airline service into Gainesville is sparse. Major airports are in Jacksonville (75 miles away) and Tampa (115 miles away). You might consider picking up a rental car at one of these.

1st.
Choice

We look forward to seeing you on our campus.

Sincerely yours,

James A. Miller

James A. Miller
Director

JAM:ct

*Airline reservations
made (see attached).
Prepare travel authorization
for my signature,
reimbursement requested
on everything.*

FLIGHT SCHEDULE
Gainesville, Florida

June 28

7:44 a.m.

LEAVE Lansing, North Central Flight 912

11:39

ARRIVE Atlanta, Georgia

June 29

2:00 p.m.

LEAVE Atlanta, Eastern Airlines Flight 664

2:58

ARRIVE Gainesville

July 1

2:30 p.m.

LEAVE Gainesville, Eastern Airlines Flight 782

7:05

ARRIVE Lansing

*Try Sheraton - Baltimore
311 Peachtree St.
for Atlanta reservation*

35 Case Hall
Southern Michigan University
Kalamazoo, Michigan 48276
May 16, 1972

Dr. Benjamin Kofi, Chairman
Department of African and Afro-American Studies
12 Harbarger Hall
Northern Central University
Lansing, Michigan 48231

Dear Dr. Kofi:

I am a student at Southern Michigan University currently working on my Master's degree in African History. I will graduate in the Summer term. I have applied for admission to Northern Central University to pursue the Ph.D. in African Studies and International Relations.

OK I am planning to come to Lansing either on June 28 and 29 or July 17. I would very much appreciate an appointment with you to discuss my program. I would be grateful if you could advise me as to the convenience of either of these dates for you as soon as possible, as I plan also to talk with professors in the Department of International Relations.

I look forward to hearing from you.

Yours truly,

Bruce Blackburn

Bruce L. Blackburn

*Answer please.
give appointment
10:00 a.m.*

Letter left in shorthand pad not transcribed

Dr. Olu Adejuigbe	"Aspects of Nigerian
African Studies	Drama" > 9 / 172 ②
University	2 i Cy i ena
Boston ①	u 150 / C 6 E 1
Amherst 60178	9 b . y h r
Adejuigbe:	y . 6 . 0 q r a h
b . m . r . a . u . l	i . h . u . e
u . y . t . g . i	a . u . e . g . o . e . y
o . l . e . p . e	r . b . l . e
a . y . l . e . o . r	a . f . e . y . 2 . u . n
6 420 African	y . m . C . u . C . h
Lit. r . e . c . e . v	u . y . n . e . i . 2
r . e . c . a . p . e . c . e	
→ 2 7 r 10	
t . i . n . e . r . e	
f . e . u . ② u . ②	
29 ② e . h	5/17/72

FOLDER NO. 2

LABOR PAYROLL INFORMATION

NAME		DEP	IDENTIFICATION NO.		ACCT. NO.	DEPT.	TIME	RATE	AMOUNT
DO NOT WRITE ABOVE THIS LINE									
NAME (LAST NAME FIRST)			Hours	Tenths	DAILY TIME RECORD				
IDENTIFICATION NO.			Monday		PAY PERIOD				
ACCOUNT NO.			Tuesday		19__ (To) 19__				
DEPARTMENT NAME			Wednesday		APPROVED FOR PAYMENT				
TIME			Thursday		Dept. Head				
UNIT OF TIME			Friday		Dean				
Hours__ Month__			TOTAL		DO NOT FOLD OR STAPLE				
Days__ Event__			FOR PERIOD						
Weeks__ Other__									

Student will need at least three cards.

Department Head or Foreman

[illegible]

Soc. Sec. No. 341-87-2998

Department Head or Foreman

[illegible]

Department Head or Foreman

[illegible]

APPENDIX C
FORMS NEEDED IN THIS PROJECT

NORTHERN CENTRAL UNIVERSITY
Nonacademic Personnel
REPORT OF ABSENCES TO PERSONNEL OFFICE

Employee's Name _____	
Classification _____	Department _____
Payroll: Salary _____	Labor _____
REASON FOR ABSENCE: Illness _____ Vacation _____	
Funeral _____	Other _____
Relationship _____ Specify _____	
Date(s) of Absence _____	
Total Number of Days (or hours) Absent _____	
Signed _____	Phone _____ Date _____
Department Head _____	

The student will need at least three of this form.

N O R T H E R N C E N T R A L U N I V E R S I T Y

D I R E C T P A Y M E N T V O U C H E R

INSTRUCTIONS

1. Prepare with typewriter in quintuplicate.
2. Send first four copies to University Business Office.
3. The fourth copy will accompany check, and the third will be returned to Department as evidence of payment.

Date _____

PAYEE

Name _____ Soc. Sec. No. _____
 Home _____
 Address _____

ACCOUNT TO BE CHARGED

Department _____
 Account No. _____
 Account Name _____

PURPOSE: This voucher is to be used when the issue of a requisition and purchase order is not possible because of the nature of the payment.

PLEASE BE EXPLICIT IN THE REASON FOR EXPENDITURE

AMOUNT

I CERTIFY THAT THE ABOVE PAYMENT
IS CORRECT AND JUST.

Signed _____
Department Head or Authorized Representative

Approved _____
Director or Dean

TOTAL PAYMENT

Do Not Type Below This Line

CHECK NO. and DATE

VOUCHER NO.

N O R T H E R N C E N T R A L U N I V E R S I T Y

DEPARTMENT OF AFRICAN AND AFRO-AMERICAN STUDIES

Lansing, Michigan 48321

OFFICE OF THE DIRECTOR

120 Harbarger Hall

Phone 344-1300

(EXAMPLE OF ONE TYPE OF LETTERHEAD)

NORTHERN CENTRAL UNIVERSITY
Official University Travel Authorization

Requested by:	Rank, Title or Position:	Department:
Travel from:	To:	Account Name:
Purpose of trip:		Account Number:
		Date of Departure:
		Date of Return:

Reimbursement requested for:

- ☐ 1. Transportation only.
☐ 2. Transportation only; limited to \$ _____ of actual supportable expense.
☐ 3. Transportation, lodging, meals, and miscellaneous.
☐ 4. Transportation, lodging, meals, and miscellaneous; limited to \$ _____ of actual supportable expense.
☐ 5. None.

Mode of Travel:

- ☐ Commercial Airline.
☐ Charter Aircraft.
☐ Railroad
☐ Bus.
☐ Private Car.
☐ Ride with _____
☐ Other (specify) _____

University Vehicle.

Driver _____

Passengers _____

Signature of Traveler _____ Date _____

Approved by:

Signatures -		
Department Chairman or Director	Dean or Assistant Dean	Provost (Overseas travel)
Date _____	Date _____	Date _____

INSTRUCTIONS

1. Prepare with typewriter, or ink, duplicate copies, retain one for file
2. This form is to be used for in-state, out-of-state, or foreign travel.
3. When using a University vehicle, this approved authorization must be shown at the Motor Pool prior to departure on the trip.
4. The original copy shall be returned to the traveler after approval and shall be stapled to the Travel Voucher.

MICHIGAN STATE UNIVERSITY LIBRARIES



3 1293 02502 8550