Chapter XVIII

Office Management

BUSINESS METHODS AND SOCIAL WORK. The discussions of the previous chapters have followed a path which has steadily diminished in width: from the broad considerations of the constitution to the more specific details of the bylaws; through the responsibility of boards, committees, and executives into the details of office arrangement and equipment, personnel policies, and staff management. This is a path along which, for the most part, the whole activity of the organization may march. The path now narrows down to one wide enough for only part of the program of the agency. From now on most of the discussion will concern itself specifically with the methods of the business, financial, and public relations functions of the agency. These activities are related to the professional service of the organization, since they provide facilities and means for carrying it on more effectively. They are, nevertheless, the kinds of activity which are most closely comparable to the procedure of business offices in industrial and mercantile establishments and in governmental agencies.

The business functions and methods of the social agency would include all those activities which are concerned with getting the routine business of the office done efficiently. The principles and practices followed have been well demonstrated both in business establishments and in governmental and social agencies. There is ample literature on the subject of office management; some of the best of it you will find in the bibliography at the back of this book.

Among the subjects included in office management are the following: (1) managerial duties, including compilation and application of the office manual, supervision of records, organization, planning, assignment of work, supervision, inspection and checking, and delivery of completed work; (2) stenographic and typing service, including stenographic work, dictating machine operation, typing (copy work, records, and so forth); (3) bookkeeping service; (4)

telephone service; (5) reception service; (6) filing; (7) record keeping; (8) messenger service; and (9) operation and maintenance of office machines. Our own observation, thought, and experience of these subjects are recorded in this and following chapters.

The office is a large part of what is sometimes called "overhead" in the social agency. However, the fact that there is such a head over the organization, with well-conceived policies and procedures, alone makes it possible to carry on the work of the agency efficiently and economically, as an effective instrumentality of human service.

OFFICE MANAGER. Perhaps the first necessity of an effective office is that it shall have a responsible chief clerk or office manager in charge. (Let us call him the office manager, for the sake of simplicity.) If no office manager is specifically employed, a tactful, responsible staff member whose work requires him to spend full time in the office may act as an executive, adviser, and director of the clerical staff.

(*a*) *Full-Time or Part-Time.* Most social agency offices, as a matter of fact, do not need a full-time office manager. The person who serves in that capacity usually should have other detailed duties, such as accounting, secretarial service, checking lists, or typing to fill in his time when he is not engaged in executive work. On the other hand, a surprising amount of time can be profitably spent by an office manager who will give active attention to all the functions of office management, including planning, preparing schedules, assigning work, instructing, supervising, checking up on work, and reporting results.

Office management should not be a sideline. The manager should do first and fully his executive work and then give the time that is left, if any, to other office work. In a departmentalized organization, the office manager would be a department head, with ability, responsibility, standing, and salary equal to those of other department heads.

It is difficult to specify the size of office which needs a full-time manager. That would depend on the competence of the personnel and the nature of their duties. We would think that an office with ten or more secretarial and clerical employees would need a person who gave the major part of his time to management, and that in a clerical staff of three or four persons one member should be designated to serve as chief clerk or chief stenographer.

(*b*) *Responsibilities.* Whether the office manager gives full or part time to executive work, all general clerical work should pass

through his hands and no demands on the unassigned clerical or stenographic staff should be made except through him. Of course secretaries assigned to specific executives would do their work directly. We favor, however, a stenographic and clerical pool to which most of the work can be allocated as needed. Only with this arrangement is it possible to plan and carry on the tasks of the office smoothly and effectively.

Each sub-executive should be encouraged to eliminate, as far as possible, demands on the staff for emergency work. He should be required to give the office manager advance notice of heavy jobs and should turn over to the latter as much as possible of the preparatory material for a big job in advance of the time required for its completion.

A typical set of duties for the office manager (and the persons under his direction) is set forth in the manual of the Community Chest and Council in Houston as follows:

> Interview and employ all non-executive personnel.
>
> Schedule, assign, supervise, and route all clerical work performed in the central office, including operation of all office machines and switchboard.
>
> Maintain general files; maintain master file; post pledges and other information to master file.
>
> Prepare prospect lists and other material for campaign.
>
> Open and distribute mail; enclose and mail monthly statements and other mail involving a large volume of work.
>
> Order supplies and equipment and issue purchase orders.
>
> Maintain stock room and inventory.
>
> Make requests of proper persons regarding maintenance and repair of equipment and building.
>
> Serve as secretary of the prospect committee for campaigns.

This office manager would also have been responsible for supervising the bookkeeping if the agency had not had a separate auditing department.

The office manager will find it wise to try out certain jobs himself to find the best way of doing them, in addition to using the methods he develops through observation, reading, and study of the methods of other organizations. A good office manager, who should possess many of the qualities already mentioned for a general executive, can save a great amount of time and money in an office of any considerable size.

An organization with district offices may have in each office a district secretary who is under the general supervision of the office

manager in the main office. The office manager should receive regular reports from the district offices and should visit them from time to time to discuss special problems. The district secretary will of course work under the specific direction of the district superintendent, who is responsible for professional service within the district.

OFFICE MANUAL. No matter how competent the office manager may be, neither he nor the employees can do their work effectively unless they are aided by some sort of up-to-date written rules and regulations which describe the duties and privileges of staff members and the methods by which work is to be carried out. The office manual is sometimes called the "Office Bible." Manuals are widely used in industry, business, government, and social agencies.

The office manual which we use includes the following subjects:

1. Description of the agency and its general functions.
2. Brief history of the agency.
3. Office organization and organization chart.
4. Titles and duties of the executive staff.
5. Office policies—including office hours, holidays, annual leave, absence and sick leave, overtime, salary payments, retirement income insurance, group hospitalization and medical care, handling of campaign pledges of employees, and resignations.
6. Staff organization—including staff committee, staff meetings, and staff lounge.
7. General office procedures.
8. Purchase orders.
9. Messenger service.
10. Transportation and travel.
11. Reimbursement for official expenses.
12. Use of telephone and telegraph.
13. Current practices (covering the current methods for performing operations which have not been standardized).
14. Individual standard practices (instructions for specific jobs).

Another outline, recently suggested by Arthur Dunham, Professor of Community Organization in the Curriculum in Social Work of the School of Graduate Studies of the University of Michigan, follows:

a. Introduction (the why, what, and how of the manual).
b. The agency—general description; history; purpose, functions, philosophy; organization; personnel.
c. Policies ("the policy book").
d. Personnel policies.
e. Job specifications or descriptions, and job standards, where these have been formulated.

f. Record forms.
g. Procedures and standard practice instructions.

The manual should be mimeographed or dittoed, and preserved in loose-leaf folders or ring books. If a manual is bulky, marginal tabs to indicate sections or chapters may be helpful.

The office manual should be given in its entirety to each supervisory staff member. Each other staff member should be given a copy which includes the general information about the agency and the organization of the office as a whole, plus instructions regarding his own job and those of other employees with whose work he must dovetail his own. The holder of each copy of the manual should be registered, and he should return his copy to the agency when he leaves its employ.

The manual ought to be revised whenever any specific changes are made in practice. It should be gone over in detail by the office manager or some other responsible member of the staff at least every three months. In this way the agency can make sure that the manual covers the current practice in the office. If it does not do so, either the manual or the practice should be revised.

(*a*) *Value of the Manual.* The value of the office manual is clear. The manual is at once a textbook for new employees and a reference work for both old and new. It prevents disputes as to responsibility and holds workers to those responsibilities. It helps to clarify the relationship of one job to another and of each job to the organization as a whole. It saves time which otherwise would be spent in explanation and argument, expecially in regard to details of performance. It stimulates current thinking regarding the policies and practices of the organization, for suggested policies must be put in writing and subjected to definite criticism. It helps to keep an inaccurate or careless worker up to the mark, for the evidence of his own inefficiency is clear if he fails to meet the standards indited. Perhaps most important, the manual tells the best and quickest way to do the *routine* jobs, thus leaving more time and energy for the creative tasks. Thus, if the case worker prepares her monthly statistical report in thirty minutes instead of an hour and a half, she will have that much more time left for her basic job of giving case work service, which is more creative, more interesting, and more directly concerned with service to human beings.

(*b*) *Dangers of the Manual.* Nevertheless certain dangers may be experienced in the use of the office manual. Such use may become too rigid. It may not correspond to actual practice, and then it will

cease to be respected by the employees. It may define so sharply the responsibilities of the different workers that important work will fail to be done because it falls between the duties listed for each worker. This difficulty is less likely to occur if all workers participate actively in the formulation and execution of the policies of the organization.

(*c*) *Job Descriptions as Part of the Manual.* A necessary preliminary to the satisfactory preparation of an office manual and an integral part of every manual should be the written description of every job already discussed in relation to employment. Written description helps to fit employees for handling the work of others during illness or vacation. It is also of great value in planning the distribution of work, in laying out the different jobs in relation to one another, and in studying the whole work of the organization in terms of the operations to be performed. Job analysis and description are described at length in numerous books on office administration, notably in Leffingwell's *Office Management Principles and Practices.* Anyone who wishes to make a detailed analysis and to prepare a description of a job will find it well to study such material.

(*d*) *Standard Practice Instructions in the Manual.* Growing out of the job analysis and description, and still more important for the office manual, are standard practice instructions. These may apply either to the procedure of the organization as a whole or to specific jobs. Ordinarily they refer to the latter. The standard practice instruction describes the way in which a particular job is to be done and may go into complete detail regarding the manner in which material is to be prepared and the various operations performed. These instructions may go so far as to employ in their preparation "time and motion" studies, as indicated by Leffingwell. There is no need to repeat here his excellent precepts. The point is that, for each job in the organization which has been reduced to routine, instructions should be written out in as great detail as is possible. Whenever the most efficient way of doing a thing, for the time being, has been found, it should be recorded in writing for the use of the whole staff. That standard procedure should be followed until a better way has been found. Thereupon the procedure should be revised and new standards set.

The advantages of written standard practice instructions as part of the office manual are evident. They prevent confusion as to methods of work. They record the best methods of each employee for the benefit of all. They facilitate the training of new employees

and the filling in of temporarily vacated jobs by substitutes. They make sure that no one in the organization has any "trade secrets" which he takes with him when he departs. Indeed, one aim of the office manual should be to make certain that no person is indispensable to an operation.

(*e*) *Group Participation in Analysis and Standardization.* Standard practice instructions and job descriptions do not grow out of thin air. Nor can they successfully be the product of a "snooping" autocracy. Although some individual may be responsible for the preparation of these documents, they are most effectively prepared and most satisfactorily worked out when they are developed through that technique of participation which has already been emphasized so frequently. Thus job descriptions may be undertaken by asking the workers themselves to write up their jobs as they see them. These descriptions may then be criticized by the office manager and discussed with the employee, talked over again with groups of workers, and finally, when both executive and worker have agreed as to their exactness, made a part of the records of the organization. Standard practice instructions, too, are best prepared when each member of the staff writes out the way in which he does his particular job. After revision by the office manager, all the employees who are engaged in this particular work are asked to discuss the instructions and to make suggestions. Finally, the standard practice is adopted in final form as the result of agreement by the workers.

If you are confused as to the difference between job descriptions and standard practice instructions, reflect that the former are "what you do"; the latter, "how you do it." That ought to dispel the fog!

The manual should be presented to the board or to the personnel committee for approval so far as general policies are concerned.

(*f*) *The Manual Need Not Be Complex.* The agency should not delay the preparation of an office manual until all its operations are completely standardized. The staff should, rather, put in writing the procedures which it has developed and then expand this written record as practices crystallize. As Arthur Dunham suggests, "the way to start a manual is (1) to make a general outline of the proposed contents, (2) to *record present practice.* Don't try to revise and perfect all your practices before you record them, or you'll probably never have a manual. Record what you do now; then go ahead with all the revision that is needed. The revision process should be more or less continuous, in any case." Every step made in this direction will simplify, control, and improve the assignment of responsibility and will add to the efficiency and economy of the agency.

Even if the office manual is not complete, each employee at least should have a card or sheet which lists his duties and describes the methods of doing his work.

(*g*) *Manuals of Local Branches of National Agencies.* Local agencies that are chartered or established as branches of national organizations will include in their manuals any rules, statements of procedure, or standard practice instructions which are prescribed by the national agency, and they will see that their manuals are corrected as new material comes from the parent body.

(*h*) *Manuals of Governmental Agencies.* Similarly, branches of the local, state, or federal government will include in their manuals provisions of the city or county charter and ordinances, of the state or federal constitution, and of state and federal laws which control the agency's activities; interpretations and rulings of courts, government attorneys, auditors and comptrollers, and other officials in respect to these legal documents; and pertinent rules and regulations of the government or unit of government of which the agency is a part.

This material must be kept up to date. The public official is obliged to operate within the limitations and in accordance with the material described above. Severe penalties and nullification of his acts may be consequent upon his failure to do so. His plea of lack of knowledge will not be accepted as an excuse. Therefore his manual should be complete and current in respect to the official material which we have described.

(*i*) *Index to Manual.* If the manual is at all complex—and those of governmental agencies especially must be—an index which covers every subject included in the manual should be part of it. The index should be corrected as new material is included within the manual. And of course there should be a table of contents in the front of the manual.

(*j*) *Advantages of Loose-Leaf Manual.* The manual can most readily be corrected and maintained if it is set up in loose-leaf form. When a correction is to be made or new material received from higher authority, a new page or pages can be duplicated and issued to all holders of the manual, with instructions that the old pages be initialed and returned to the office manager for destruction. Thus the manual can be kept always up to date, an ever-ready guide to agency practice.

(*k*) *Mix the Manual with Common Sense.* No manual can take the place of common sense. As the executive of a large public health nursing organization warns: "Whether one is working in the office

or in the field, human beings are, after all, different from office furniture and filing pieces. It is said that the president of a national corporation with many branches once telegraphed all of his plants when a railroad strike was impending, 'In the event of a strike, headquarters expects each supervisor to use his common sense.' This is a good standard to follow 365 days in the year. After workers have been tried and found capable, their good work should be stressed occasionally and they should be given as much responsibility and leeway as possible." An office manual will free such workers for the tasks which require initiative and common sense and for adjustment to everyday emergencies, because the routine which must be followed and the regulations which are essential to frictionless operation are presented in it.

MEASUREMENT OF OUTPUT. In addition to the standard practice instructions in the office manual, the office manager, if he is properly to plan and distribute the work to his clerical and typing staff, must have some knowledge as to how much work of a given kind his employees can turn out. Without this knowledge he may have some employees waiting for work or dawdling at it while others are so overworked that they will be unable either to finish the work on time or to do it accurately or adequately.

It is true that in many social work offices the number of employees is so small and the variety of their work so great that measurement of output is difficult. Still, some methods of measurement can be devised which will form a valuable basis for planning future work.

For example, if the office manager counts the number of dictating machine cylinders the average transcriber can handle during the day, he can readily see when one operator has too many and another not enough to keep her busy. The manager then can equalize the distribution of the cylinders. The output of the entire office will be greater if this is done than would otherwise be the case.

In the same way, the office manager should know the capacity of his various office machines—how many envelopes an addressing machine will do in an hour, how many sheets the mimeograph will print per hour, and so on. With that information he can plan his possible mechanical output and make his promises for completion of the work (with suitable leeway for contingencies) in terms of his equipment.

He can count the number of three-line names and addresses of contributors his typists can do on a manuscript list in an hour. From this he can compute how many girl-hours will be necessary to type a

list of 10,000 names. If a girl can turn out 100 names an hour he knows that this job should take 100 hours. This would mean either one girl working 100 hours, or 10 girls for 10 hours, or whatever other disposition he can make of time and of labor force.

Computation may be made more elaborate on routine jobs in various ways, as for example:—to estimate the output of typewriting, by measuring the square inches of typing turned out in copying manuscript material in reports, or by attaching cyclometers to typewriters to count the number of strokes; to estimate the daily output of a clerk in checking cards, by multiplying the thickness of her cards, in inches, by the number of cards to an inch.

Records of output may be used in the evaluation of employees; in that case they should be made part of each employee's personnel record.

WORKING FOR ACCURACY. Speed, however, is no more important than accuracy in production. One method of promoting the latter is to check each piece of work carefully for accuracy, record the number of corrections which are necessary, and list on the bulletin board or in the office records the percentage of accuracy of each worker.

In some work the high accuracy which this method encourages is desirable. In other operations, however, it seems safe to follow the principle that only those mistakes which come to light are important and that the accuracy of workers may be measured by the number of complaints which are caused by their errors.

For example, an organization's list of members or subscribers may be divided into six approximately equal parts, with one clerk in charge of each section responsible for making out bills, for making corrections due to removal or death, and for posting payments made on subscriptions. By this plan the organization benefits, because each clerk is familiar with his section of the files and hence does better work. Furthermore, each clerk is held responsible for any errors made in his section. The knowledge that errors can be located and charged to a specific individual promotes accuracy.

Another effective method of supervision is to check repeated samples of the work of each employee.

Still another way, as in the making of master cards for a list of prospective contributors, is to have the clerk initial each card he makes. Thus errors can quickly be traced to their source and the makers of the errors admonished.

If records of speed are kept, the records of accuracy should be

checked against them so that the worker will receive credit only for a combination of speed and accuracy—much, for example, as in the typing tests which have already been mentioned in connection with employment.

Instead of holding the supervisor responsible for measuring output, it is sometimes easier to have each employee every night fill out a report based on his own measurement of the amount of work he has done and showing the time of beginning and ending each job and his output on that job. As a guide to faulty assignment of work, clerical employees may also be asked to report the time lost in waiting for work as well as that actually spent in work.

It is not always desirable to measure all the work done by clerical workers. A log, which is kept for a week or two every three months or so, may give sufficient measurement of the speed with which each operation is being done and of the kinds of work each employee is doing. The log will serve as a basis for the revision of the schedule of work. It will aid, too, in scheduling further operations in terms of actual performance.

RECOGNITION OF PERFORMANCE. Regardless of the procedure by which work is measured, it is often effective to post the results on the bulletin board. The relationship between the output of the different members of the staff may be shown in terms of rate per hour. The relative speed of each employee may be indicated by a bar of appropriate length opposite each name. A second bar beneath the "speed" bar may show the percentage of accuracy. The fact that one's record is known serves as an incentive to better and more accurate output. Moreover, the element of competition between workers gives zest to their activity. More work is produced with less apparent fatigue and better spirits than if each worker is "on his own."

In confirmation of this idea, the secretary of one of the larger social service exchanges of the country has written:

> The Exchange maintains a daily report for each staff member which contains the number of inquiries cleared, cards typed, indexed, or refiled, etc. At the end of the week this material is tabulated by the chief clerk and posted on the bulletin board. This record has been effective in detecting discriminations formerly unnoted, and in stimulating old and new staff members to a definite standard of output, accuracy, and thoroughness.

A further effective use of measurement has been suggested by the executive of a children's agency:

Stenographers keep individual day books, noting the amount of time consumed in dictation according to schedule, and extra time allotted to case workers by the office manager. These books at a glance show whether the stenographer is carrying a reasonable amount of dictation and also allow for subsequent shifts of dictation. At the end of each week two sets of figures are drawn off the books: first, the total amount of untranscribed dictation; second, amount of dictation time used by each case worker. The latter information is transferred to individual record cards filed at the supervisor's desk. They show whether the case worker is using his allotted two hours a week, is behind in dictation, or is requiring an undue amount of extra dictation time.

Of course, we would suggest that this agency use dictating machines. The number of cylinders, transcribed and untranscribed, could be recorded in the same way as proposed for the stenographers.

Any record of output should be simple. Its tabulating and analysis should be centralized. Only those records should be kept which are significant and pay their way in terms of accuracy of work, improvement of output, allocation of duties, and enhancement of morale.

SCHEDULING OFFICE WORK. The efficient office manager will maintain a list of all his clerical workers, either in a notebook in his desk or on the bulletin board. Each day he may post after every employee's name the work he is to do that day. He may also find it desirable to indicate the duration of each job, either by some sort of bar chart or by symbols which will show the work to be done each hour.

For more complicated jobs he may supplement his chart of the duties assigned to each staff member with a detailed schedule of all office operations for a period such as a month or a quarter. Again, a visible index may be used; in this the work to be done is noted on index cards arranged in order by the days of the month. There could be a different-colored card for each employee. This index shows each job that is to be done days, weeks, or months in advance; indicates clearly what is to be done on a given day; and, if any work is unfinished, shows this also. At the completion of the work the cards can be filed in a "completed" section and used over again if the work is repetitive.

By the use of these or similar devices, tasks can be assigned before an employee runs out of work. Heavy jobs, such as checking long lists, can be scheduled weeks in advance. Progress toward completion can be indicated by bars drawn across the chart each day to

show the amount of work actually accomplished. A chart that is in view of all the employees will give them a sense of participation in results and will help them to more effective effort than if they are working with no knowledge of what work lies ahead. A regular schedule of dictation may be made for all stenographers or dictating machine operators so that dictation can be given outside of the scheduled hours only by special arrangement. On larger and more detailed jobs, the use of a chart and the records of the workers' possible output will be a great help to the office manager, for it will enable him to postpone the work which can best be put aside for an emergency job. When it is necessary to employ additional workers and equipment or to arrange for overtime work, he can proceed serenely in the knowledge that the standard practice instructions and the estimated output will make him master of almost any situation. Only with a system of measurement, plus the careful scheduling of operations, will he be able to work in the light instead of in more or less darkness. He will be saved untold worry, and the organization will be able to get its work done promptly and as planned.

STAFF FOR EMERGENCIES. In order to meet the emergency demands that are always arising in an organization, it is well to have a staff large enough to handle emergency needs so that routine work can be set aside when necessary—and there are always emergencies in any social agency. If clerks have free time, they can do fill-in work, such as checking names of persons from newspaper death lists against contributors' lists, filing pamphlets, and the like.

IMPORTANCE OF AN EVEN FLOW OF WORK. No organization, however, should allow its professional or volunteer workers to think that emergency work can be given too frequently to the clerical staff. Plans once settled upon must ordinarily be adhered to. Schedules as far as possible must not be changed. Effective management of an office depends to a large extent on an even flow of work according to plans and schedules laid well in advance. Executives and sub-executives who are often faced with emergencies caused by their inadequate planning should occasionally be allowed to suffer delay in execution of their dilatory projects and warned that in the future they had better plan farther ahead if they want the co-operation of the office. Genuine emergencies should be met in good spirit. The work of the office should be so organized, and contacts with volunteers and staff members made so effective, that emergency work will tend to disappear in long-time planning and in scheduling based on known capacity for performance.

The primary expectation of the executive and department heads of an organization is that when a job is delegated to the office manager it will be finished at the time agreed upon. If this is not possible, they should be told of the delay in ample time for them to make other plans and should be given clear statement of the reasons for delay. The most successful office manager is the one who always makes good on his promises, partly because he never promises what is impossible and partly because he can always secure the co-operation of the other executives in making their plans in advance. Still, when a genuine emergency arises, he should meet it with the motto of the "Seabees" in the Second World War—"Can do!"

An office, thus constructively managed, will be a vital force in facilitating the human service of the agency.

QUESTIONS

1. List what you consider the business functions of some typical social agency with which you are familiar.
2. Does that agency have some specific person in charge of office activities?
3. If so, what are his responsibilities?
4. What work, other than office management, does he do?
5. Has this agency an office manual?
6. If so, what subjects does it include?
7. What advantages and disadvantages does this agency find in the manual?
8. What does this agency do about job analysis and description?
9. What does it do about standard practice instructions?
10. How, if at all, does it measure clerical output?
11. What use, if any, does it make of such measurement?
12. How does it endeavor to secure accuracy in office work?
13. How, if at all, is its office work scheduled?
14. How does this agency handle emergency office work?
15. How, if at all, does it secure an even flow of office work?
16. How do you think the management of this office might be improved?