Chapter XIX

Efficient Office Methods

DICTATION OF LETTERS AND RECORDS. One of the operations which has to be most frequently scheduled in the social work office is handling the dictation of correspondence and case records.

(*a*) *Similarity between the Two.* The dictation of letters and that of records have much in common. We shall not venture to lay down any rules for record writing, because we have never served in a case working agency—our services have been with the co-ordinative phases of social work. On the other hand, observation leads us to believe that what is said here regarding correspondence will apply almost equally well to case records.

(*b*) *Conversational Tone.* A conversational tone must be striven for first of all. A letter is merely a substitute for conversation. In general, the letters of a social agency should be informal. They should eschew such antiquated mannerisms as "In response to your esteemed favor of the 15th ult. beg to state" in favor of the more natural "Your letter of October 15 pleased us greatly. We are glad to know that we are so nearly agreed. We would suggest. . . ." Talk about "you" and "your" rather than "I" and "mine." The principles of good conversation extend even to the close of the letter. The old-fashioned conclusion, 'Thanking you in advance for your courtesy, I am, Very truly yours," might well give place to the more conversational form, for example, "I know you will be glad to render this service. Expectantly yours."

(*c*) *Avoid "Humor."* In spite of conversational informality, letters should never transcend the bounds of courtesy and good breeding. Joking is usually out of place, because the humor may be misunderstood and misapplied. Conversely, a letter cannot show the nuances of the speaker's voice and the expression of his face which turn into a joke what otherwise might be a stinging gibe.

(*d*) *Good Style.* Letters should be well composed from the point of view of good English. (Some time ago we received a letter from

the proud executive of an agency which was building a new institution. The letter read, "We are just putting up our petitions." Presumably his "petitions" were not to the Lord but were to separate one client from another.) There should be variety in the style. Striking words should not be repeated unnecessarily; rather, synonyms should be used to give grace and variety.

(*e*) *Getting the Recipient's Point of View.* A good way to begin a letter is to repeat significant words of the letter which is being answered. If, for example, the correspondent has written, "My wife has been sick and I have been unable to pay my pledge," the reply might read, "We are very sorry indeed to learn that your wife has been sick." The correspondent may go further and express the sympathy which should be the attitude of every social agency, and say, "We hope that she will soon be entirely well and that your financial difficulties will disappear. We well know the stress under which you find yourself at the present time. While we hope that you will be in a position to pay your pledge ultimately for the sake of those less fortunate than yourself, we shall be happy to postpone payment until that time which will be most convenient to you. How would it be if we sent you no more bills until September 1?"

(*f*) *Letter Appraisal Chart.* Important points are well summarized in the following letter appraisal chart which serves as the introduction to *Writing for the Social Security Board,* published by the Federal Security Agency:

LETTER APPRAISAL CHART

Before appraising a letter, be sure to determine its exact purpose. What response is desired from the addressee?

Can you answer "Yes" to these questions?
Is the letter:

1. Complete—
   a. Does it give all information necessary to accomplish its purpose?
   b. Does it answer fully all the questions, asked or implied?
2. Concise—
   a. Does the letter include only the essential facts?
   b. Are the ideas expressed in the fewest words consistent with clearness, completeness, and courtesy; have irrelevant details and unnecessary repetition been eliminated?
3. Clear—
   a. Is the language adapted to the vocabulary of the addressee?
   b. Do the words exactly express the thought?
   c. Is the sentence structure clear?
   d. Is each paragraph one complete thought unit?

e. Are the paragraphs arranged in proper sequence; are the ideas presented in the most effective order?

4. Correct—
   a. Is the accuracy of all factual information beyond question?
   b. Are all statements in strict conformity with policies?
   c. Is the letter free from: (1) grammatical errors, (2) spelling errors, (3) misleading punctuation?
5. Appropriate in Tone—
   a. Is the tone calculated to bring about the desired response?
   b. Is the letter free from antagonistic words or phrases?
   c. Is it free from hackneyed or stilted phrases which may amuse or irritate the addressee?
   d. Does the entire letter evidence a desire to co-operate fully?
6. Neat and Well Set Up—
   Will a favorable first impression be created by: (1) freedom from strike-overs and obvious erasures; (2) even typing; (3) position on page?

How effective is the letter as a whole?

To what extent is the letter likely to accomplish its purpose, obtain the desired response, and build good will? In other words, how do you rate its general effectiveness—Outstanding? Good? Passable? Unsatisfactory?

(*g*) *When Are Letters Unnecessary?* Even though the burden of correspondence is often a heavy one, the social agency should guard against following too closely the assertion of some business executives that too many letters are written. Although it may be that in some businesses the acknowledgment of a letter received or a courtesy rendered is unnecessary, it is wise in social work to seize every legitimate opportunity for creating good will by a written recognition of services and courtesies. Letters of appreciation or acknowledgment of information supplied, of questionnaires filled out, or of other services need not be lengthy. As a matter of fact, one or two short discriminating sentences will often suffice. The extra labor, stationery, and postage for such little extra touches—"unnecessary" but desirable—if mixed with discretion, clarity, and brevity bring back in good will many times the slight cost which is involved.

(*h*) *Carbon Copies.* Letters have a definite value as a record of what the dictator, as his agency's representative, wishes to record regarding its policies and activities as stated to another agency or individual. More than that, letters record for the agency, through carbon copies, what it has been committed to through correspondence.

Carbon copies involve extra expense in the cost of carbon and copy paper and the extra time of inserting them in the typewriter. This expense, however, can be considerably reduced in three ways:

First, there is no need for carbon copies of letters that are so purely routine and unimportant that no record need be kept.

Second, the cost of carbon paper may be considerably reduced if it is used as long as it will make good copies and not discarded as soon as it is slightly dimmed or develops a few wrinkles. The cost may be reduced further if tests are made to determine the kind of carbon paper which will give the most copies at the least cost. When the standard carbon paper has been decided upon, an additional saving can usually be made by purchasing coupon books good for the delivery of a certain number of sheets of the carbon paper.

Third, copy paper can be dispensed with, in most cases, by making the carbon copy of the reply on the back of the letter which is being answered. If the original letter is put into the typewriter upside down, the name and address to which the reply is being written can be seen so that the typist can transcribe them correctly. When, on the other hand, the letter answered is of a different size from the stationery being used, or when the letter dictated is not an answer but represents an original communication, copy on copy paper must be made. In the average agency, this procedure should eliminate half the carbon copies which usually bulge the file, should save the expense of much filing equipment and copy paper, and should make it impossible for the carbon copy to become separated from the original letter. It is one of those simple procedures which hardly seems worth mentioning, but which, surprisingly enough, is not followed to any large extent either by social agencies or business concerns. (We first mentioned this idea sixteen years ago in this book's predecessor, *Social Work Administration.* We are pained occasionally to visit agencies which display copies of that book but still make carbon copies in the old-fashioned, wasteful way!)

(*i*) *Let Typists Do Copying.* A further economy in the cost of handling correspondence is possible if the office force is so organized that typists are available to handle any work that requires a large amount of copying which would otherwise have to be done by stenographers or dictating machine operators. In this way the lower-paid typists handle the routine typing, and the more highly paid transcribers and secretaries handle the dictation which they alone can do.

FILING CORRESPONDENCE AND RECORDS. The social agency which applies the above practices in the dictation and copying of its correspondence (and its case records) still has the problem of keeping this material in such shape that it can be easily and quickly found when

wanted. To meet this problem every agency must have an adequate filing system for its correspondence and case records.

(*a*) *Central Filing System.* Usually the filing system is embodied in a central filing department. In it is kept all the material which may be needed by members of the staff, with the strict understanding that none of it is to be kept in their personal files or drawers.

(*b*) *Work Up to Date.* To be effective, the filing must be kept up to date. All the material should be filed each day so that it can be instantly located. If the file clerk cannot keep up with this work, other duties which she may have must be delegated to someone else, or a better file clerk must be secured, or an additional part-time or full-time clerk must be provided.

(*c*) *Competent File Clerks.* Filing is so vital a part of the work of a social agency office that in the larger organizations it should be handled by specially trained clerks, with actual experience in fast and accurate work of this kind. They must know the filing system and be able to follow it. They must use good sense in filing the material in the correct place so that it can be easily found by someone else if necessary. They should know something of the work of the organization so that they will understand the nature of the correspondence to be filed. Then they can file it correctly and not by some system of guesswork known only to themselves.

A good file clerk can be an invaluable aid in providing, completely and quickly, information which the organization needs. On the other hand, a poor file clerk can make out of a good filing system a miscellaneous grab bag, of no value to anyone and an actual impediment to the progress of the agency.

Filing clerks should therefore be carefully chosen, trained, and supervised. They should be paid enough and treated well enough to insure their remaining on the job rather than shifting to some other organization about the time they begin to be really useful. Filing is not merely a routine job but a creative service. It need not be a full-time job, but the person who handles it as well as other work must live up primarily to the job requirements on filing. It is vital!

(*d*) *An Adequate System.* The filing system itself must also be adequate. It would be unwise in such a book as this to prescribe any particular system. It must be adjusted to fit the needs of the individual organization. Preferably the system should be the result of conferences between the executive who supervises it and representatives of competent dealers in filing equipment. However, a few principles which should be followed may be worth stating.

One of these is that adequate cross references are essential. This means that in addition to filing a piece of correspondence, memoranda which refer to it should be filed in every other place where the material might be sought. For example, in a community chest office, a letter from one of the member organizations regarding plans for a building fund campaign might be filed under the name of the organization. In addition, there should be a cross reference in a folder on "Building Campaigns" or "Capital Accounts Committee." Again, a letter might mention several different subjects, such as plans for a capital accounts campaign, request for change in a current expense budget, and plans for an annual meeting. This letter would probably be filed under the name of the organization; then, in addition to the cross reference sheet in the "Capital Accounts" folder, similar cross references should be put in the folders on "Budget Committee" and "Annual Meeting."

Another device that will greatly simplify filing procedure is to put in the file an "out" card or a "charge" slip, which describes what has been removed and who has it, whenever a folder or document is taken out. This procedure will make possible the prompt location of the missing material and may prevent a great deal of fruitless and vexatious searching.

(*e*) *Keep the File Clerk Responsible.* In order to enforce the responsibility of the file clerk, the organization should make an invariable rule that no one except the file clerk shall take anything from the files or return anything to them. All requests for material should be made to the clerk, and all material should be returned to him for filing. Only in this way can responsibility be centralized and the possibility of error reduced to reasonable proportions.

In order that executives of the agency may get needed material outside of office hours, they should be schooled in the filing system. When they withdraw anything from the files, they should be required to sign a memorandum and leave it on the file clerk's desk. Material thus taken should be returned to the file clerk and not to the file—it might be put in the wrong place.

(*f*) *Annual House Cleaning.* A primary necessity for effective filing is at least an annual house cleaning during which all the material not likely to be needed is cleared out. Material which is certainly of no value may be thrown away. That which is of uncertain value may be put in inexpensive transfer files or in suitably labeled boxes. Transfer files and boxes need not be kept in the general office but can be put in the stock room until perhaps a year later,

when they may be inspected again and further stripped of non-essentials. While the file clerk is doing this house cleaning he should give to all executives the material which pertains to their work and about which he is not sure, asking them to dispose of everything that need not be preserved. In this way great quantities of out-of-date material can be discarded, the purchase of new files postponed, and the process of finding material in the files greatly simplified.

(*g*) *Only File What Will Be Needed.* The annual file cleaning can be greatly reduced in intensity if all those who send material to the files are instructed to send only that which they are reasonably sure will need to be referred to again. Much routine correspondence can be thrown away when answered. The primary test should be whether anybody will want to refer to the material again and, if so, whether finding it or not will make any difference in the policies and practices of the organization. The cutting down of material to be filed saves filing equipment and floor space. In addition, it saves time in filing, in looking for material that is wanted, and eventually in clearing out the files.

Some organizations require—whenever anything except correspondence that affects their procedures, such as clippings, pamphlets, and printed matter, is to be filed—that the individual who wishes to have this material filed must attach to it an outline of its further possible use. Such a requirement greatly reduces the enthusiasm of some individuals who usually send to the file everything they think might be used sometime under some hypothetical but non-existent circumstances. The file should hold everything in the way of records, correspondence, and information which will enable the organization to do its work more expeditiously and effectively, but it should not contain a single thing that does not contribute to that result.

(*h*) *Methods of Classification.* It hardly seems necessary to discuss various methods of classifying the material to be filed, because they vary so greatly from organization to organization according to the needs of each. Still, it might be well to outline here a few of the main types of classification.

The simplest method is the alphabetical, corresponding to the arrangement of names in the city directory or the telephone directory. This classification is likely to be the most satisfactory for a large majority of social agencies. Sometimes the alphabetical files may be subdivided according to the particular kind of material filed. The subsidiary material would be filed alphabetically within each classification.

For example, a community chest might put in one section of its file material concerning its member organizations, arranged alphabetically by name. Another section would contain correspondence with contributors; another, general correspondence, also alphabetically arranged according to subject; still another, out-of-town social agencies and individuals, with a different folder for each city arranged alphabetically.

Another system of filing often used is the numerical. In it correspondence or records are numbered serially as received and filed in that order. This system requires an alphabetical cross index on cards, usually 3 by 5 inches in size. On these are recorded the numbers of the files so that each can be located.

An organization with detailed case records would have its own filing system for handling this voluminous material so essential to effective work. Usually case records are filed numerically in chronological order, with a card index by names filed alphabetically.

A variation of the numerical system is the chronological tickler file, arranged by days of the month. There is a folder for each day. Into the folders are put memoranda and letters which are to come to the attention of staff members on specified days. Each day the file clerk removes the material for that day and distributes it among those responsible for handling it. This plan might either replace or supplement the individual tickler system already described. (It would not replace *our* tickler system. There is too much in it!)

A modification of the numerical system may be desirable for the filing of pamphlets, clippings, and similar material. This modification is known as the Dewey Decimal System and is used generally in libraries. In it the digits, tenths, hundredths, and thousandths refer to the main classifications and sub-classifications. The social agency which adopts this system will probably find it wise to make its own numerical classifications to correspond with the kinds of material to be filed. A main heading might be Child Welfare, number 1. Under this classification Child Health might be 1.1; Dependent Children, 1.2; Dependent Children in Foster Homes, 1.21, and so on. A decimal file, though useful in combining related material for research purposes, would probably have to be used with an alphabetical subject file which indicated the classification under which each subject was filed. This system seems unnecessarily intricate for the average social agency.

In general, the alphabetical system or some modification of it is usually the best for correspondence. The chronological numerical system may well be best for heavily laden case records. It is an awful

job to keep moving them around to make room for new records in an alphabetical system. Better start at the beginning and "leave 'em lay" where they fall by dates.

Another method of classification sometimes used, especially by social agencies engaged in state-wide work, is the geographical method. In it correspondence and records are filed according to the communities or counties to which they refer.

The important point about all these filing systems is that the social agency should study its own particular problem, consult with the best available authorities as to filing methods, select that method which seems best suited to its needs, and then follow it thoroughly and intelligently.

(*i*) *Enough Guides.* A great help to effective filing is an adequate supply of guides to indicate the subdivisions of the file. Guides expedite and facilitate the finding of filed material. Within the limits of expense and complexity, the more guides there are the more easily and quickly the desired material can be found. Standards often used are one guide for every thirty cards in the file, and for correspondence twenty-four guides for each drawer. Thus, if a card file included 30,000 cards, there should be 1,000 subdivision guides. It is probably better to have too many guides than too few. Although having too many adds unnecessary expense, this is offset to some extent by the greater speed in finding the material needed. If the guides are too few, the saving in money is outweighed by the time and difficulty of finding material. Just as no filing system is better than its operator, so also no filing system is better than its guides.

(*j*) *Filing Reports, Pamphlets, and the Like.* Almost every active social agency is likely to possess a considerable amount of printed and duplicated matter, including annual reports of other organizations, reports of surveys and studies and similar data, clippings from newspapers and magazines, and much other material pertinent to its work and potentially useful either for the preparation of reports and publicity material or for the information of committee members. Any material which by being folded or pasted on sheets of paper can be reduced or raised to the standard size of 8½ by 11 inches can be satisfactorily filed.

All such auxiliary material is usually bulky and ordinarily not in active use and therefore does not belong in the general files. Instead, it can be kept in cardboard boxes, filed in folders arranged by subjects within each box and with the type of subject matter indicated by label on the outside of the box. The boxes may be further classi-

fied by number. A card index of all material so filed should be maintained, arranged alphabetically by subjects, with the box number on each card. These boxes may be kept (on end) in a bookcase or on storage shelves. Beside them may be placed the bulkier reports and books which cannot be put in the boxes. Such material can be identified by numbers pasted on the back of each item and by corresponding cards in the subject file. By these devices all the floating material to which any member of the organization may have legitimate claim for reference may be kept out of the regular correspondence files and yet be available for quick inspection.

Our own personal attitude is that most of this stuff is junk and should be "filed" in the waste basket. Usually the best reference material is the store of knowledge and experience cached away in the miraculous filing system of one's brain, plus the few reference works mentioned in the chapter on office equipment. We did know a fellow, though, who compounded all his solemn and much-respected articles for professional magazines from clippings and pamphlets, intermixed in judicious proportion. He could whip up an article at any time from his carefully indexed idea pantry.

In addition to this varied literature which the squirrel-minded may wish to preserve, the department of public relations may want to keep a miscellaneous collection of photographs of board members, campaign workers, and other officials, as well as of photogenic and acquiescent clients of the social agency. (Be sure you have written releases from clients before you use their pictures.) Photographs can usually be filed in boxes according to subject, much as are the samples of printed matter and clippings just described, provided the size is not larger than 8½ by 11 inches. If they are larger, the mount can perhaps be trimmed down by the file clerk with the consent of the director of public relations. If the photograph cannot be cut down to the proper size for filing, it should not be filed in the regular filing cabinets; the public relations department should be responsible for keeping it.

The public relations department is usually the prime mover in keeping half-tone or line cuts on file. If the cuts will actually be used again, they should be filed in a cabinet with horizontal drawers of the same height as the cuts. These drawers should be numbered. A proof of each cut filed alphabetically by subject should bear the number of the drawer in which the cut can be found (if not borrowed and unreturned).

The original cut is usually used only once. Ordinarily the best

procedure with one-use cuts is to have the copper or zinc pried loose from the wooden block to which the cut is attached. When enough of the metal has been accumulated it can be sold to the photoengraver at pound rate. If this is not done, an active and retentive director of public relations may accumulate a vast quantity of bulky half-tones and line cuts which are of no conceivable use and merely clutter up the agency's office.

"Stock" cuts, such as those of the seal of the organization or any other standard pictorial device, should of course be preserved. If electrotypes are made of them, the original cut need not be worn out.

CARD FILES. Cards of various sorts must be filed in almost every social agency office. They may include cross indices to the correspondence; indices to case records, perhaps imprinted with forms for the accumulation of statistical data; lists of contributors and members; lists of vendors of desired commodities; a stock record of the items in the store room; a list of all furniture and equipment owned; lists of committee members, board members, and (in larger organizations) staff members; lists of community resources such as agencies, churches, and other groups and persons with which and whom (how's that, Mr. Webster?) co-operation may be expected; lists of volunteer workers; lists of similar organizations in other cities, and so on.

(*a*) *Combination Files.* It is not always necessary to keep a separate card file for each list of persons. If a number of lists are used, on each of which several identical names appear, these lists may be combined so that each name appears only once. The different lists on which a name may belong may be indicated by different-colored cards, by tabs of various colors, or by signals clipped to the tops of the cards.

(*b*) *Use of Tabs or Guides.* A great deal of information can be supplied by means of tabs, guides, or signals of different shapes and colors clipped to the upper edges of cards—through the position of these signals, their color, and their shape. Thus in a file of statistical cards for a family society the signals may indicate the size of the family; the race, religion, and social status; whether the mother was widowed or deserted, and other similar information; the social problems manifested; and whether the family concerned is an "open" or a "closed" case. Contributors might similarly be "signaled" as to the size and year of their gifts; their special interests; whether their last subscription was an increase over that of the previous year, a decrease, or the same amount; whether the subscription is a new one

or an old one; whether payment has been made; when the next payment should be made; when the next letter of request or renewal should be sent out, and so forth. Anyone who is setting up signals for a card filing system will do well to confer with the representative of a competent dealer in filing supplies to find out what systems and equipment best meet the problems of the agency. The use of tabs presumes that the ordinary "blind" or vertical files are used. These suffice for most social agencies.

Visible files, however, may justify the extra expense involved, through the greater speed of finding material, if the information is sufficiently important and if the cards are used often enough. Guides as to the different classifications may be indicated by strips of celluloid of various colors and other devices put over or fastened on the cards. See the dealer; he will love to tell you about them—and to quote prices.

(*c*) *Size of Cards.* Attention should be given to the size of the cards used. Manifestly the larger the card the more expensive it is and the more expensive and bulky the equipment for its use.

It would seem almost unnecessary to caution the person who is installing a card system to use cards of standard size so that economies in the purchase of material and equipment can be made. Yet we have seen striking examples of failure to take this precaution. The result was that costly equipment had to be built to order, and considerable paper stock was wasted in cutting the cards.

The standard sizes of cards are 3 by 5 inches, 4 by 6 inches, and 5 by 8 inches. The size of the card should be determined in part by the quantity of material to be put on it. For example, a mere cross index to the case records of a family society would probably be carried satisfactorily on a 3 by 5 inch card. On the other hand, a complicated statistical card, or one for recording contributions of a subscriber over a number of years, might require the 4 by 6 size.

(*d*) *Exact Size Important.* Great care should be taken to have the cards cut exactly the size of the file for which they are intended. The size of the card should be carefully specified and the printer's proof closely checked. (Some printers are inexact!) If possible, the cards should be die-cut rather than trimmed by the usual paper cutter. Die-cut cards fit the filing equipment exactly. Further, because of their regularity of size, they contribute to the ease and speed of separating, sorting, and counting.

(*e*) *Weight and Quality.* The weight and the quality of the card, as well as its size, should be considered.

For some purposes, when a card is to be used only infrequently or

for a short time, a cheap, thin card or perhaps heavy, stiff paper may be used. Paper, however, is sometimes difficult to handle because successive sheets stick together when they are being sorted.

On the other hand, a permanent record that is handled a great deal and must stand erasure and other treatment should be on thicker, tougher, more expensive paper, perhaps made of rag rather than of wood pulp.

In making some lists it is necessary to produce an extra copy of the record. In this event the card stock should be light enough to transmit a clear impression to the material on which the copy is made.

If the cards are to be run through a typewriter and the stock is stiff, cards should be cut with the grain running horizontally rather than vertically so that they will go easily around the typewriter roller without breaking, cracking, or sliding. On the other hand, if the card stock is light it may be desirable to have the grain run up and down so that the cards will stand up sturdily in the file without bending or sagging.

In each case, test the proposed card stock under conditions which as nearly as possible approximate the desired use. Choose the stock which meets these standards of service at the lowest cost.

(*f*) *Card Forms Simple.* If record forms are to be printed on the cards, the forms should be as simple as possible. They should demand only essential information. As far as possible the data should be entered on the cards with check marks rather than in complicated writing. For example, a list of possible nationalities printed on a card, on which the appropriate one may be indicated with a check mark, will save a great deal of time in recording information. In the same way, possible membership numbers can be printed and the actual number checked.

FORMS AND THEIR USES. Many forms in addition to those on cards must be used in the ordinary social agency office—for example, face sheets for case records, various statistical forms, and financial report forms. The same general principles apply to all of them.

(*a*) *Standard Sizes.* They should be cut to a standard size which will fit card files, if they are to be filed as cards; or to the regular 8½ by 11 inch, if they are larger than cards. Social agencies often mistakenly make their forms of some odd size.

Anathema to us is the undeservedly popular legal size of 8½ by 14 inches. If forms of this size are to be filed in the regular files, those forms must be folded to the standard size. This bulges the files

unevenly. Of course if you have legal-size files, 8½ by 14 is O.K.—but how many social agencies have such filing cases? Not many that we have seen! Better stick to 8½ by 11 inches for both files and paper.

While we are on this subject of size we might as well express our own uncomplimentary opinion of half-size letterheads. They bunch up in the files, and they require special adjustments in making carbon copies. The agency has to have standard-sized letterheads as well, and the extra cost of typography and press work for two different letterheads probably exceeds the saving in paper cost. We say 8½ by 11 for all of them.

Some forms that are too large for an 8½ by 11 inch sheet can be made on a double sheet 11 by 17 and folded in the middle to the standard size. In other words, if the form is not of standard size, it should be two, three, or four times that size so that it can be folded evenly to fit the standard filing equipment.

(*b*) *Economy in Cutting Forms.* Another consideration in the size of forms is to have them of such a size that they will cut economically out of standard paper sizes. The person who orders the forms should either know these standard sizes or find out about them from the printer who is to do the job. The printer and the paper salesman can be valuable allies of the social agency in planning economical printed matter and forms.

Some time ago we tried ineffectually to soothe a printing salesman who was having trouble with a social agency. He could have saved it considerable money had the executive been willing to take his advice on the sizes of forms, the quality and weight of paper, and so on. This the executive refused to do, telling the salesman that his job was to fill orders as given. (Come to think of it, we believe this executive no longer is in social work.)

(*c*) *Uniformity in Forms.* All the forms for a given purpose should be uniform in size and shape, for convenience in sorting and filing. For harmony's sake, they might be uniform in color and typography. You may as well make them look nice, while you are at it.

(*d*) *Variety in Color.* On the other hand, color can be used effectively to differentiate between forms for different uses. If one copy of an order is to be sent to the auditor, one to the receiving clerk, one to the person who issued the requisition, and one to the firm from which the goods are purchased, a different color of paper can be used for each of these copies so as to indicate its intended destination.

(*e*) *Spacing and Organization of Material.* It is important in a form that is to be filled in on the typewriter to make the spaces between the lines either a single or a double typewriter space (one-sixth inch or one-third inch) apart, so that the form can be run through the machine without careful adjustment for each line. This spacing can usually be insured by instructing the printer to make the lines "typewriter spacing." It is well, however, to check him up on this. We have a handy ruler marked off in typewriter spacing for this purpose.

Another means of saving time in typing information on forms is to have all the figures, as much as possible, typed across the form on one line. The figures can thus be filled in without turning the typewriter roller, merely by setting the tabulating stops for each successive item on the form. This crosswise arrangement is better than to have the figures run down the form, with the consequent necessity of turning the roller for each item. In one operation we know—in making out bills—the horizontal progression saved half the actual time of typing.

MISCELLANEOUS ECONOMIES. In addition to care in planning and using forms, many other economies are possible in a social agency office. Though unimportant individually, they total up to a great deal in the course of a year. It would seem silly to mention them here were it not that observation has shown them to be overlooked in so many offices. Among these economies are the following:

Instead of ordering from the printer everything required in the way of forms, do as many as possible on the mimeograph, ditto, or multilith if there is one already installed in the office.

Have ledger cards or other record cards, which must be used over a long period of years, printed on both sides so that when one side is filled the other can be used and the earlier data retained.

Instruct the employees to turn off electric lights, fans, and other power-consuming equipment when not in use—and enforce the instructions.

Have the printer cut up out-of-date letterheads, extra notices, and other forms no longer of any value into 3 by 5 inch slips and use them for ticklers and memoranda. The fact that one side has been used does not prevent the use of the other.

These and similar efforts at economy are worth more than their face value. They help to promote an attitude toward saving and the efficient use of material in the whole organization which prevents waste and promotes painstaking endeavor.

This counsel does not mean that corners should be cut when going around the block is the best way to attain a desired result, or that stinginess should replace productive expenditure. It does mean that a social agency, as the trustee of contributed or public funds, is responsible for saving every penny possible and for not spending one cent unless responsible assurance is given that an adequate return in effective service is to be derived from that expenditure.

QUESTIONS

1. What successful methods for handling correspondence have you observed in some business organization or social agency?
2. How does that procedure check with the Letter Appraisal Chart?
3. What policy was followed in regard to "unnecessary" correspondence?
4. How were carbon copies handled?
5. How was the work of typing material to be copied divided up?
6. How was the filing handled?
7. What qualifications did the file clerks possess?
8. What filing system was followed?
9. How were the files cleared of out-of-date material?
10. What restriction was put upon material to be filed?
11. How many guides were used in proportion to the number of folders?
12. How were reports, pamphlets, photographs, cuts, and similar material filed?
13. What kinds of card files were in use?
14. What use was made of tabs, signals, or guides?
15. What sizes of cards were used, and why?
16. What considerations determined the weight and the quality of the card stock?
17. What principles were followed in the forms printed on the cards?
18. What principles were followed in the other forms used?
19. What miscellaneous devices and methods were used in this office for doing the work efficiently?
20. How do you think any of these processes and devices might have been improved?