

technical assistance workshops



WORKSHOPS AVAILABLE

IN FIELD INSTALLATIONS



WORKSHOP MATERIALS



GENERAL SERVICES ADMINISTRATION
NATIONAL ARCHIVES AND RECORDS SERVICE
OFFICE OF RECORDS MANAGEMENT

Richard M. Nixon
President of the United States

Rod Kreger
Acting Administrator of General Services

James B. Rhoads
Archivist of the United States

TECHNICAL ASSISTANCE WORKSHOPS

The National Archives and Records Service (NARS), General Services Administration, develops and presents workshops in various areas of records management for the purpose of improving Government operations. These workshops pertain to the activities for which GSA is responsible under 44 USC, Chapters 27-33.

The workshops differ from conventional training courses. They are intended only for persons who can apply the concepts immediately. Agency officials are normally expected to follow through in improvement efforts and to report the results to the appropriate NARS paperwork management officials on GSA Form 6827, "Summary of Benefits to Federal Agencies," or other means.

WORKSHOP PRESENTATIONS

NARS Workshops are presented in three ways:

- . Within the agency by agency personnel.
- . Within the agency by NARS analysts, as a part of the technical assistance provided by NARS in developing paperwork systems improvements.
- . At GSA Regional offices, at agency field installations and at the National Archives and Records Service in Washington, D. C., by NARS analysts, for participants from several agencies.

Agency officials responsible for selecting nominees are urged to screen carefully all applications to insure that they satisfy eligibility requirements set forth in the workshop descriptions below.

HOW TO APPLY FOR NARS WORKSHOPS

An Optional Form 37, "Nomination for Interagency Training," or a letter addressed to the appropriate NARS Regional Director should be used to apply for workshops presented in GSA Regional Offices or agency field stations.

To apply for workshops given in Washington, D. C., nominations should be addressed to: Workshop Director, National Archives and Records Service (NRP), General Services Administration, Washington, D. C. 20408. (Phone: (202) 963-4154 or IDS Code 13, Extension 34154.) However, before applying for workshops in Washington, D. C., inquiries should be made to the appropriate NARS Regional Director for information about availability of the workshop locally.

COST -- BILLING

There is no charge for individual participation in NARS workshops conducted on an interagency basis. At the discretion of NARS officials, charges may be made for special workshops conducted primarily for personnel of one agency. These charges will be based upon costs for providing instructors and workshop materials.

TITLE AND DESCRIPTION (WORKSHOP NUMBERS ARE SHOWN IN PARENTHESES)

RECORDS MANAGEMENT (1A): A 2-week workshop designed to provide a broad perspective of the scope and objectives of records management as a whole. The principal topics analyzed through lectures and discussions are: managing records, correspondence, directives, reports, forms, and mail; records scheduling; records disposition; office machine selection and utilization; source data automation; clerical work measurement; vital records handling; information retrieval developments; conducting a total records systems study; and do's and don'ts of an effective records management program. The workshop is designed for records officers, management analysts, supervisors, and others who have broad responsibility for management of the program areas listed above. (Individuals attending workshop 1B should not attend this workshop.)

RECORDS MAINTENANCE AND DISPOSITION (1B): A 5-day workshop covering the following areas of records management: files operations, such as subject classification, records inventorying, scheduling, and storage; mail management; vital records protection; office information retrieval; conducting an effective records systems study; and do's and don'ts of an effective records program. This workshop is designed for management technicians, records liaison personnel, records supervisors, and similar personnel who have records management responsibility for one or more of the functions listed. (Individuals attending workshop 1A should not attend this workshop.)

FORM AND GUIDE LETTERS (2A): Three half day sessions designed to improve productivity, reduce costs, and achieve simplicity and standardization in the preparation of repetitive correspondence. Demonstrations and simulated problems highlight the development of a predesigned reply system that includes both guide (pattern) letters and form letters. Those having responsibility for operations where letterwriting is a significant part of the workload are eligible.

CORRESPONDENCE MANAGEMENT (2B): A 2-day workshop explaining when a correspondence management program is needed and how to develop one. It deals with the costs of written communications, how to reduce these costs, and how to prepare letters that are clear, concise, and effective. Those responsible for writing or reviewing correspondence as well as those who are responsible for its management are eligible.

SPEEDING THE MAIL (2C): Two half day sessions concerning the handling of incoming correspondence and the clearing of replies. Methods are discussed by which shorter in-shop time for correspondence requiring a reply can be achieved. How and where improvements can be made is determined. This workshop is designed primarily for personnel in program offices where a large volume of action mail is handled.

FORMS ANALYSIS AND DESIGN (3A): A comprehensive 10-day workshop for forms analysts and trainees, forms liaison representatives, forms managers, and others needing a technical knowledge of forms analysis and design methods. How to establish and operate a forms management program and the relationship of this program to other records management programs are explained. The workshop shows how to analyze and design forms as an efficient means of recording, collecting, transmitting, and processing information. Also included are the development of forms specifications, flowcharting procedures, and the application of the survey approach to forms design.

FORMS IMPROVEMENT (3B): Two half day sessions presenting and applying techniques to smooth the flow of paperwork by simplifying and improving the forms used. Effective principles for improving, simplifying, combining, and eliminating forms are discussed and used. Participants redesign and simplify a heavy-usage form. Supervisory and administrative personnel, professional specialists, and technicians are eligible.

FORMS FOR AUTOMATION (3C): A comprehensive 5-day workshop designed to acquaint participants with requirements, specifications, and practical techniques and applications for developing efficient, economical forms for use in processing information in conjunction with ADP equipment. Special projects provide practical experience in applying the standards and techniques discussed. Participants should either have attended workshop 8B, "Mechanizing Paperwork Systems," 8A, "Source Data Automation," or be well versed in automation. In addition, they should either have attended workshop 3A, "Forms Analysis and Design," or be experienced in basic forms management principles and techniques.

DIRECTIVES SYSTEMS IMPROVEMENT (4A): A 2-day workshop designed to improve the communication of policy, procedures, and instructions in the clearest, most effective manner. It concentrates in the areas of directives planning, organizing, writing, illustrating, and editing. Those who originate directives or manage a directives system are eligible. Arrangements should be made for a one-hour orientation for agency executives when this workshop is conducted on-site in individual agencies.

MODERNIZING MANAGEMENT REPORTS (5A): A comprehensive program presented in five half day sessions concerning the continuing need for better management information and reporting. The workshop focuses on management information requirements. It demonstrates and develops ways to get the desired information at the right time through the clearest possible communication. It stresses how to stop unneeded reporting to achieve the lowest possible cost. Case histories illustrate application of the workshop techniques. Participants, working in groups, consider real or theoretical problems of their agencies. Groups of four registrants from a single agency provide the most effective pattern to study practical problems.

INFORMATION SYSTEMS DESIGN (5B): A 5-day workshop designed to acquaint management analysts with methods for developing a large information system. The workshop covers the various steps of system design, identification of information requirements, organization of data, network analysis, input and output methods, preparing systems proposals and specifications, testing, and measuring benefits. Participants work in groups to solve the problems of a fictional transit agency. When the workshop is conducted within an agency, participants consider its actual problems. Previous participation in the "Modernizing Management Reports" workshop is desirable.

OFFICE INFORMATION RETRIEVAL (6A): A 5-day workshop designed to show how and under what circumstances modern information methods and equipment may be applied to improve dissemination, storage, and retrieval of information. Participants are introduced to the techniques and systems in use today and some of those being developed. They are shown how to conduct information retrieval surveys, how to design a coordinate index system, and how to select the appropriate system and equipment. This workshop is designed to broaden the skills of management analysts, systems personnel, supervisors, and others who may be directly involved in designing and installing an efficient information retrieval system.

FILES IMPROVEMENT (7A): A 2-day workshop designed to help Government offices save time and money through effective filing systems. Participants develop solutions to problems simulating actual filing situations. The project follow-up calls for participants to apply the standards and techniques discussed in the workshop to the files of their agency. Any person required to set up or maintain files, including clerks, secretaries, and those who supervise filing operations, is eligible.

RECORDS DISPOSITION (7B): A 1-day workshop concerned with the major practices, procedures, and programs related to effective records disposition. The workshop concerns the operation of an efficient records disposition program, preparation of records control schedules, identification of permanent records, use and function of Federal Records Centers, and the relationship of records disposition to other records management programs. Any person whose duties include responsibility for control and disposition of records is eligible.

SOURCE DATA AUTOMATION (8A): A 5-day workshop exploring efficient information and data input devices, where they are needed, and how to evaluate their potential. Emphasis is on the importance and feasibility of capturing data in machine language at the first recording or at the earliest practical point in the system. The workshop is designed to provide guidance for management analysts, systems personnel, supervisors, and others directly involved in applying source data automation techniques. Participants should either have attended workshop 8B, "Mechanizing Paperwork Systems," or be well versed in automation.

MECHANIZING PAPERWORK SYSTEMS (8B): A 4-1/2 day workshop designed to help supervisors and others mechanize or automate their paperwork systems. The focus is on the use of automation, but the workshop includes the use of mechanical tools when automation is not justified. Participants determine how to locate potential areas for mechanization in their offices and how to develop improvements. When accepted for the workshop, applicants will be sent a special workshop form ("Potential Mechanization Projects") which must be filled out and brought to the workshop on the opening day. Projects listed will be analyzed during the workshop and preliminary plans for mechanization or automation developed by the participant during the workshop.

WORKSHOP MATERIALS

The workshop materials described below may be purchased from the National Archives and Records Service (NRP), General Services Administration, Washington, DC 20408 (Phone: (202) 963-4154 or IDS Code 13, Extension 34154). Additional information, including prices, will be furnished upon request.

RECORDS MANAGEMENT (1A) and RECORDS MAINTENANCE AND DISPOSITION (1B)
WORKSHOPS

Scripts, handouts, and related materials for these workshops are available on a limited basis, only.

FORM AND GUIDE LETTERS (2A)

Instructor's Package includes materials needed by the instructor in presenting the workshop: Script, 35MM slides (27), flannelgraphs (10), and sample of student handouts.

Student's Package includes required materials for student use: 20 sets of following items -- Form Letters handbook, Guide Letters handbook, and student handouts.

CORRESPONDENCE MANAGEMENT (2B)

Instructor's Package. Workshop B Instructor's Package consists of materials needed by the instructor in presenting the PLAIN LETTERS workshop, including the script, 35mm slides (33), 8" x 10-1/2" prints of the slides, flannelgraphs (23), samples of student handouts, and instructor's key.

Also available is an Instructor's Package which may be used at the discretion of the instructor in teaching PLAIN LETTERS FOR EXECUTIVES consisting of a Lesson Plan (Script), Student Workbook, Instructor's Key, and 35mm slides (82). Additional instructional material is listed in the Lesson Plan. (The flannelgraphs used in the PLAIN LETTERS Workshop described above may be used in the PLAIN LETTERS FOR EXECUTIVES Workshop at the discretion of the instructor.)

Student's Package for PLAIN LETTERS: Required materials for students in the workshop, including Plain Letters handbook; Workbooks A, B, C, and D; Fog Index, Sample Letter; 4-S Formula; and pocket folder.

Student's Package for PLAIN LETTERS FOR EXECUTIVES: Student's Workbooks.

RECEIVING THE MAIL (2C)

Instructor's Package includes Instructor's and Student's Training Kits, 35mm slides and flannelgraphs.

Student's Package includes printed materials for student use.

FORMS ANALYSIS AND DESIGN (3A)

Instructor's Kit: Material needed by the instructor in presenting the workshop, including an illustrated script, vinyl binder, 35mm slides (133), flannelgraphs (56), and vugraphs (77).

Student's Kit: Workbooks, vinyl binder, flowchart template, and 3 handbooks -- Forms Management, Forms Analysis, and Forms Design.

FORMS IMPROVEMENT (3B)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the script, 35mm color slides (47), flannelgraphs (55), copies of Forms Improvement Log, copies of Forms Improvement Report, and samples of student handouts. Also 1 flip chart, "SMA CASE HISTORY," size 30" by 40", for one-time use.

Student's Package: 20 sets of student handouts -- Forms Improvement Kit, SMA forms (set of 7 for each student), Challenge Each Copy, Filled-in Forms Improvement Report, and Simplifying Forms.

FORMS FOR AUTOMATION (3C)

Instructor's Kit: Illustrated script, vinyl binder, slides (198), and flannelgraphs (26).

Student's Kit: Workbook, vinyl binder, Port-a-Punch Cards, stylus, sponge, and 3 handbooks -- Forms Analysis, Forms Design, and SDA.

OBJECTIVES SYSTEMS IMPROVEMENT (4A)

Instructor's Kit: Materials needed by the instructor in presenting the workshop, including notebook, script, 35mm slides (76), flannelgraphs (40), packet of student exercises, and student handouts.

Student's Kit: 20 sets of student handouts, notebooks, and exercises.

MODERNIZING MANAGEMENT REPORTS (5A)

Instructor's Kit: Illustrated script, 35mm slides (57), and flannelgraphs (26).

Student's Kit: Workbook

INFORMATION SYSTEMS DESIGN (5B)

Instructor's Kit: Illustrated script, vinyl binder and 35 mm slides (255). Keysort instruction kit (manual, needle, jogging block, punches, correction tape, etc.) may be ordered from Automated Business Systems, Division of Litton Industries (any local office). One box Projection Transparencies No. 588 (100 sheets) may be ordered from 3M Company (any local office).

Student's Kit: Workbook, template, and Keysort term cards.

OFFICE INFORMATION RETRIEVAL (6A)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the Instructor's Manual, 35mm slides A1 - A25, B1 - B4, C1 - C179, and D1 - D38; flannelgraphs A1 - A4, B1 - B5, C1 - C25, D1 - D20, and E1 - E10; one set of previously punched hand-punched cards; Set II, optical coincidence cards; Set IV, optical coincidence cards, and one Student Kit. (In addition, instructor will need one optical coincidence display, or light box, which may be purchased directly from the manufacturer.)

Student's Package: Required materials for student in the workshop, including one Student Kit per student; one stylus per student, one 3-1/2" x 7-1/2" sponge per student, and six blank hand-punched cards (IBM Form D36915) per student. (In addition, students should be provided with 1 each of the following NARS-GSA Handbooks: Subject Filing, Files Operations, File Stations, Information Retrieval, Information Retrieval Systems, and Microform Retrieval Equipment Guide.)

FILES IMPROVEMENT (7A)

Instructor's Kit: Script, 35mm slides (94), flannelgraphs (134), mock-up boxes for a case file and a subject file, 1 student kit containing 8 problem packets and the Files Operations handbook.

Student's Package: Student kits containing 8 problem packets and the Files Operations handbook.

RECORDS DISPOSITION (7B)

Instructor's Package: Materials needed by the instructor in presenting the workshop, including the script, 35mm slides, flannelgraphs, and one Records Disposition student's package.

Student's Package: Student's package containing material for use in the workshop.

SOURCE DATA AUTOMATION (8A)

This workshop is being revised, and the new materials will probably not be available until the latter part of Fiscal Year 1973.

MECHANIZING PAPERWORK SYSTEMS (8B)

This workshop is expected to be available for purchase in the spring of 1972 and will include the following:

Instructor's Kit: Materials needed by the instructor in presenting the workshop, including an illustrated script, slides and a vinyl binder.

Student's Kit: Workbook and vinyl binder.

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Agency field personnel should direct all inquiries concerning applications, scheduling, and related information about NARS technical assistance workshops to the appropriate NARS Regional Director below:

GSA Regions 1 and 2

Regional Director, NARS
General Services Administration
26 Federal Plaza
New York, NY 10007
FTS: (212) 264-3514
(local: 264-3514)

GSA Region 3

Regional Director, NARS
General Services Administration
Room 7016, 7th & D Streets, SW
Washington, DC 20407
FTS: (202) 962-2455
(local: 962-2455)

GSA Regions 4 and 5

Regional Director, NARS
General Services Administration
1776 Peachtree Street, NW
Atlanta, GA 30309
FTS: (404) 526-5611
(local: 526-5611)

GSA Regions 6, 7 and 8

Regional Director, NARS
General Services Administration
819 Taylor Street
Fort Worth, TX 76102
FTS: (817) 334-2759
(local: 334-2759)

GSA Regions 9 and 10

Regional Director, NARS
General Services Administration
49 Fourth Street
San Francisco, CA 94103
FTS: (415) 556-3425
(local: 556-3425)

GENERAL SERVICES ADMINISTRATION
REGIONAL OFFICES

