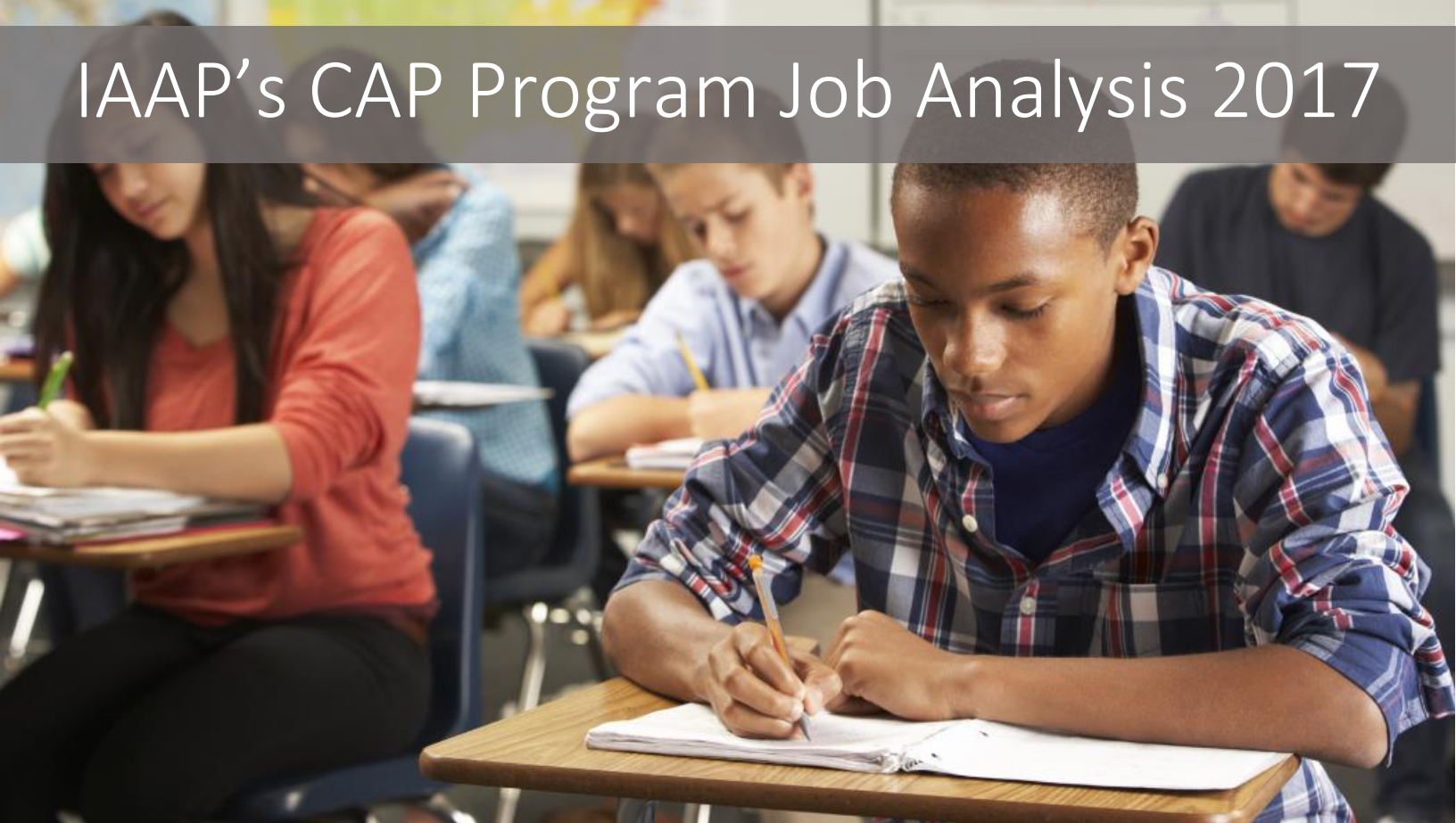


# IAAP's CAP Program Job Analysis 2017



Prepared for:



**iaap**  
Leading  
Administrative Professionals

Prepared by:



**ASSESSMENT SYSTEMS**  
— FOR GOOD MEASURE™ —

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## IAAP's CAP Program Job Analysis 2017

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A new job analysis survey was conducted for IAAP's Certified Administrative Professional (CAP) program in June, 2017. This survey follows the 2010 JA survey and the recently produced Body of Knowledge (BOK).

### Previous Studies

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The 2010 job analysis consisted of a list of 122 job task statements. Standards for job analysis focus on job tasks as the starting point and knowledge, skills, and abilities within those tasks. Examinations, in contrast, tend to focus on knowledge and skills, which are more readily measured by objective tests. In this study 86 items were ultimately used for the analysis. Rasch measurement was used to develop interval scales for the analysis. Nine major categories were described with percentage distributions ranging from 17% (Communication) to 1% (Advanced Administration).

A study of the future direction of the CAP certification program was conducted in 2013-4. This project included a survey of importance of 33 existing and proposed examination topics and led to the production of the CAP Body of Knowledge. The CAP Body of Knowledge document contains 55 performance outcomes (POs) distributed across seven domains, each with up to five additional specific statements that serve as examples. The format for each statement begins with an action verb and focuses on the knowledge, skills, and abilities required of an individual holding the CAP certification.

### Format of Survey

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In the interest of taking full advantage of IAAP's work to date on the Body of Knowledge (BOK), focusing on job tasks, and offering a survey of manageable length, a format for the 2017 survey was adopted in which the 55 higher level statements of the BOK were rated for importance. In support of each of the performance outcome (PO) statements, a specific job task was listed as an illustration. For the most part, the job tasks were chosen from the more specific subordinate statements in the BOK; however, some minor change in wording was sometimes required, as the "on the job" task performance was more likely to involve preparing a product or performing the task rather than "identifying" or "describing" – terms more associated with prerequisite knowledge. In a small number of cases, an illustrative job task was written for the purpose of the survey.

Final design of the survey included nine demographic items, the 55 BOK statements, a query requesting the respondents to suggest holistic weightings of the seven domains in the BOK (total to equal 100%) and two questions about recertification requirements. Respondents were encouraged in the directions to consider their own position or their most recently held position, not the scope of administrative professional positions in general. Finally, respondents were asked to suggest additional topics or make comments that they chose. Typically, topics suggested fit within the current Body of Knowledge organization.

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## JTA Focus Group

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A focus group of subject matter experts (SMEs) was appointed to review the draft survey, edit the Body of Knowledge after reviewing survey results, and to make a recommendation for distribution of examination content for content domains. Concern was exercised for diversity in the appointment of this group. This group consisted of nine individuals, all holding CAP certification. Their professional experience ranged from 9-30 years, with an average of 22 years. Positions held included Senior Executive Assistant, Executive Assistant (5 SMEs), Administrative Assistant II (2 SMEs), and Senior Business Unit Associate. Geographic distribution included six different states, District of Columbia, and international representatives from Canada and Bermuda. Eight different employment sectors were represented: insurance, education, sports, government, nonprofit, healthcare, finance, and technology.

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## Survey Development and Responses

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Two webcasts were held prior to pilot testing of the survey. The first was an orientation to the survey and an invitation to add other items or propose edits to any items that were unclear. Any items with low importance ratings would potentially be subject to removal after the survey data was collected. After deliberations, two of the 55 items were divided to make separate references to paper and electronic work processes for the purpose of the survey, bringing the total number of items to 57.

Piloting of the study focused on clarity of directions, formatting, and minimization of scrolling. Following the completion of the pilot, solicitations were made to complete the survey. This occurred in two forms: a dedicated email blast, and a link through the IAAP's LinkedIn and Facebook accounts. The survey was online from June 12 to June 30, 2017. 1033 surveys were completed. Of the JTS blast emails 17,325 were successfully delivered, 5,015 were opened, and there were 1,424 clicks. For the social media link, there were 17,299 delivered, 3,103 opened, and the survey link clicked by 159. Of the 1033, 952 were counted for the question on percent domain weights. Some responses could not be included because they did not add up to 100 percent total. The JTA Focus Group agreed that the survey sample size of a thousand provided good coverage for administrative professional positions held and types of employer organizations.

## JTA Focus Group Recommendations

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There were two follow-up activities to the survey. First, the focus group participants were oriented to the results. At that time a possible proposal was suggested by the IAAP staff facilitator to remove performance outcomes that received lower ratings, for example, less than 2.50 (between “moderate importance” and “very important”). Based on the survey responses, the JTA Focus Group were asked to make comments on the individual performance outcomes (POs). Comments were received on 23 of the 57 survey items associated with POs. These formed the basis for discussion in a follow-up webcast. As a result of this discussion, the wording of several POs was revised slightly, and a set of two items associated with electronic and paper filing were recombined as they were in the original BOK. The most important decision that was made was to delete domains six and seven POs, three in domain seven Human Resources and four in the seventh domain Financial Functions. These POs had low ratings, and the SMEs agreed that they were not typically a part of administrative professional positions. The deletions led to a reconsideration of the number of domains included on the examination. Given the reduced content in domain 7, it was combined with former domain 6 (*Human Resources*). After some discussion, new domain 6 was named *Operational Functions*.

The final task of the JTA Focus Group was to determine the domain weightings for the CAP examination. For this task, they were supplied with several pieces of information from the survey: average ratings for each domain based on individual POs, rank order of the domain ratings, and the percent distribution of the holistic domain weightings. They were also provided the current domain weightings. All of these pieces of information were based on seven domains. The original domains 6 and 7 had a total weighting of 13%. The new ratings were to capture ratings based on the combined domains 6 and 7 as new domain 6, operational functions. All of the SMEs rated the domains, and means were calculated (to two decimal places). For a final webcast, SMEs were again given the information from the survey plus their own group averages and their averages rounded to the nearest percent. At the subsequent webcast, based on all data (including the survey responses), slight changes to the percentages were suggested. The final result was circulated to members of the JTA Focus Group who were unable to participate in the conference call, and the recommendation was approved.

## Demographics

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Table 1: Employment Status

Number	Percent	Employment Status
83	8.03	Currently Unemployed
906	87.71	Full-time Salaried/Hourly
8	0.77	Full-time Self-Employed
19	1.84	Part-time Salaried/Hourly
11	1.06	Part-time Self-Employed
6	0.58	Temporary Employment

Table 2: Organization Type

Number	Percent	Type of Organization
2	0.19	Advertising/Public Relations
19	1.84	Construction
180	17.42	Education
24	3.29	Engineering/Architecture
82	7.94	Financial/Accounting
158	15.30	Government
126	12.20	Health Care/Medical
17	1.65	Hospitality Industry
63	6.10	Insurance
14	1.36	Legal
69	6.68	Manufacturing/Industrial
6	0.58	Media Communications
55	5.32	Not-for-Profit
22	2.13	Oil/Gas
8	0.77	Personnel/Human Resources
17	1.65	Sales and Marketing
11	1.06	Telecommunications
25	2.42	Utilities
125	12.10	Other

Table 3: Employer Size

Number	Percent	Number of Employees (Range)
82	6.00	Less than 15 people
102	9.87	15-100 people
175	16.94	101-500 people
130	12.60	501-1000 people
564	54.60	More than 1000 people

Table 4: Number of Years Working in the Field

Number	Percent	Number of Years
77	7.45	1-5
92	8.91	6-10
131	12.68	11-15
146	14.13	16-20
307	29.72	21-30
280	27.11	More than 30t

Table 5: Position Title

Number	Percent	Position Title
226	21.88	Administrative Assistant
38	3.68	Assistant to...
50	4.84	Coodinator
309	29.91	Executive Administrative Assistant
70	6.78	Office Manager/Administrator
94	9.10	Senior Administrative Assistant
246	23.81	Other

Table 6: Supervise Others?

Number	Percent	I supervise others
784	75.9	No
249	24.1	Yes

Table 7: Racial/Ethnic Origins

Number	Percent	Racial/Ethnic Origins
116	11.23	African American or Black (not of Hispanic Origin)
2	0.19	American Indian or Alaskan Native
17	1.65	Asian or Pacific Islander
44	4.26	Hispanic/Latino
68	6.58	I prefer not to answer this question.
0	0	Race and/or Ethnicity Unknown
19	1.84	Two or More Races
767	74.25	White (not of Hispanic origin)

Table 8: Highest Education Level Achieved

Number	Percent	Highest Education Level
62	6.00	High School Diploma/GED
298	28.85	Some college courses
95	9.20	Business/Technical/Vocational School Diploma
230	22.27	Associate's degree
289	27.98	Bachelor's degree
59	5.71	Master's degree

Table 9: Actively Hold CAP?

Number	Percent	Actively Hold CAP?
417	40.37	No
616	59.63	Yes



## Ratings for CAP Body of Knowledge Domains and Performance Outcomes

The following table lists the instructions and ratings for the main survey items, based on the performance outcomes of the CAP Body of Knowledge. Each performance outcome was also tied to an example task, which was provided for illustration.

Table 10: Rating of Domains and Performance Outcomes from the CAP Body of Knowledge

- For each pair consisting of a knowledge and example task statement provide a rating based on your current or most recent work experience. Remember that you are rating the knowledge statement and the link to a task is provided only as a representative example.
  - 0 = Not Needed
  - 1 = Low Importance
  - 2 = Moderate Importance
  - 3 = Very Important
  - 4 = Essential

<i>ORGANIZATIONAL COMMUNICATION</i>			
Mean	3.09	1PO1	Describe the concepts and applications of communication, management, and leadership models/theories within organizations.
	Task Example		Apply communication and management concepts in workplace activities.
Mean	3.24	1PO2	Describe the process of effective interaction with internal and external stakeholders of an organization.
	Task Example		Demonstrate proficiency in managing and resolving conflict within an organization.
Mean	2.74	1PO3	Recognize the importance and utilization of professional networking.
	Task Example		Demonstrate virtual and in-person networking techniques for professional advancement and employee recruitment.
Mean	3.11	1PO4	Demonstrate an understanding of team dynamics within organizations.
	Task Example		Identify, evaluate, and manage the skills and competencies of team members.
Mean	2.94	1PO5	Describe the positive and negative types of interpersonal interactions within an organization.

	Task Example		Demonstrate knowledge of how to motivate others through effective leadership skills.
Mean	2.47	1PO6	Demonstrate knowledge in the techniques of speaking in public.
	Task Example		Prepare for and deliver a presentation.
Mean	2.99	1PO7	Demonstrate the ability to conduct business with diverse cultures.
	Task Example		Demonstrate multi-cultural communication in the workplace.
Mean	2.7	1PO8	Demonstrate a basic knowledge of organizational structure, systems, and strategies, including their role in productivity and effective management.
	Task Example		Prepare a strategic plan for a project of limited scope.
Mean	3.43	1PO9	Demonstrate how confidentiality, legality and ethics are important for the functioning of an organization.
	Task Example		Understand basic employer and employees rights with regard to legality.
	<i>BUSINESS WRITING AND DOCUMENT PRODUCTION</i>		
Mean	3.23	2PO1	Demonstrate knowledge of terminology associated with business writing and document production.
	Task Example		Develop a formal and an informal document, applying appropriate format and style for each.
Mean	3.64	2PO2	Exhibit proficiency in proofreading and editing documents.
	Task Example		Edit and proofread a draft business document.
Mean	3.66	2PO3	Demonstrate proficiency in the use of grammar, spelling and sentence construction.
	Task Example		Review documents for correct spelling, punctuation, capitalization, and sentence construction errors.
Mean	3.33	2PO4	Describe the steps required to create and edit different types of business documents.
	Task Example		Select software applications best suited for particular business documents (e.g., MS Word, MS Publisher, Adobe Acrobat)

Mean	2.46	2PO5	Describe the technical aspects of office and web publishing (typefaces, printing styles, graphics, fonts, etc.)
	Task Example		Demonstrate features of tools used for desktop publishing.
Mean	2.83	2PO6	Identify the necessary elements needed to create and present effective charts and graphs.
	Task Example		Create a chart, table, or graph and embed it in a business document.
Mean	2.8	2PO7	Identify the important elements necessary for finishing a document (e.g., binding, collation, stapling, coloring, graphics, etc.)
	Task Example		Prepare a document (hard or electronic) to be viewed appropriately when completed.
Mean	2.98	2PO8	Demonstrate proficiency in the creation of minutes for meetings.
	Task Example		Prepare minutes for a meeting, capturing the essence of agenda items and actions taken.
		<i>TECHNOLOGY AND INFORMATION DISTRIBUTION</i>	
Mean	2.82	3PO1	Describe the process of information distribution within an office environment.
	Task Example		Organize distribution lists for various types of communications.
Mean	2.82	3PO2	Identify the important differences between traditional and electronic distribution of information.
	Task Example		Draft a formal cover letter and an email communication to accompany distribution of a report.
Mean	2.51	3PO3	Identify copyright laws, regulations regarding intellectual property, and ways to maintain confidentiality when distributing information.
	Task Example		Identify proper attribution of quotes from published documents.
Mean	2.9	3PO4	Describe the process and techniques of gathering, compiling, and analyzing data.
	Task Example		Conduct research for a company report or presentation.
Mean	3.02	3PO5	Demonstrate knowledge in the use of the Internet, including social media, as a way of distributing information.

	Task Example		Demonstrate proficiency in social media use and etiquette.
Mean	2.62	3PO6	Demonstrate basic knowledge in installation, maintenance, and troubleshooting both equipment and software.
	Task Example		Identify usage and functions for common office and computing equipment.
Mean	2.36	3PO7	Demonstrate basic knowledge in the use of different types of computer systems.
	Task Example		Identify potential issues with compatibility of encrypted files on Microsoft and Apple operating systems.
Mean	2.57	3PO8	Describe common ways of storing and transferring data and the types of media appropriate for each.
	Task Example		Back up an electronic database properly and protect it for later access.
Mean	2.59	3PO9	Explain appropriate security procedures for maintaining, backing up and storing information.
	Task Example		List secure methods for storing information and preventing unsecure duplication.
		<i>OFFICE AND RECORDS MANAGEMENT</i>	
Mean	2.55	4PO1	Demonstrate knowledge of basic terminology associated with records management.
	Task Example		Participate in discussions in which terms such as metadata, records retention, and data archiving may be used.
Mean	2.88	4PO2	Identify the key advantages and disadvantages of electronic and manual (paper) file management.
	Task Example		Utilize both paper and electronic filing systems as appropriate based on access requirements and organizational needs.
Mean	2.44	4PO3a	Demonstrate knowledge of manual (paper) filing rules and standards.
	Task Example		Recommend procedures for controlled access and editing records based on ARMA guidelines.
Mean	2.57	4PO3b	Demonstrate knowledge of both electronic filing rules and standards.

	Task Example		Recommend procedures for controlled access and editing records based on ARMA guidelines.
Mean	2.8	4PO4a	Identify the appropriate security for manual files.
	Task Example		Identify record and file security processes based on legal and confidentiality issues.
Mean	2.94	4PO4b	Identify the appropriate security for electronic files.
	Task Example		Identify record and file security processes based on legal and confidentiality issues.
Mean	2.68	4PO5a	Demonstrate knowledge of paper file retrieval, maintenance, and retention.
	Task Example		Develop a record retention schedule for files both electronic and paper.
Mean	2.74	4PO5b	Demonstrate knowledge of electronic file retrieval, maintenance, and retention.
	Task Example		Develop a record retention schedule for files both electronic and paper.
Mean	2.36	4PO6	Define the basics of creating functioning and productive workspaces.
	Task Example		Identify elements of office layout that are most essential to efficient working conditions.
Mean	2.92	4PO7	Demonstrate knowledge of resources necessary to efficiently manage an office.
	Task Example		Place and receive supply orders.
Mean	2.34	4PO8	Identify the important methods of checking and maintaining inventory.
	Task Example		Identify procedures for reconciling inventory lists to physical inventory counts.
Mean	2.21	4PO9	Demonstrate knowledge of forming a virtual office.
	Task Example		Identify strategies for maintaining effective communication between on-site and virtual office employees.
		<i>EVENT AND PROJECT MANAGEMENT</i>	
Mean	3.04	5PO1	Demonstrate knowledge of basic terminology associated with event management.
	Task Example		Participate in the planning of events ranging from internal meetings to external conferences.

Mean	3.16	5PO2	Demonstrate proficiency in travel preparation.
	Task Example		Plan both domestic and international travel for a member of senior management.
Mean	3.32	5PO3	Describe the key requirements for meetings both in person and virtual.
	Task Example		Organize and plan meetings both face-to-face and virtual.
Mean	2.86	5PO4	Demonstrate knowledge in prioritizing and delegating elements of a project from planning to implementation.
	Task Example		Identify and evaluate the skills and competencies of others for project delegation.
Mean	2.87	5PO5	Describe the steps required in organizing , planning, and managing a project.
	Task Example		Outline a plan for developing and implementing a project using project management tools.
	<i>HUMAN RESOURCES</i>		
Mean	2.3	6PO1	Identify the basic terminology associated with human resources.
	Task Example		Participate in discussion with HR professionals using terms such as affirmative action, EEOC, and talent acquisition.
Mean	2.5	6PO2	Demonstrate knowledge in the duties and processes of human resources.
	Task Example		Demonstrate knowledge of and purpose for employee relations programs (e.g., harassment, policies & procedures) and performance evaluations.
Mean	2.54	6PO3	Identify the necessary policies and procedures of maintaining employee files/records.
	Task Example		Understand what records can and can't be kept on employees in their personnel file.
Mean	2.56	6PO4	Explain why training and procedure manuals are important for an organization.
	Task Example		Incorporate effective procedures in the design of training programs.
Mean	2.19	6PO5	Describe the recruitment process, staffing, and hiring practices.
	Task Example		Participate in interviews for job candidates.

Mean	2.66	6PO6	Recognize why cultural and generational diversity is important for organizations.
	Task Example		Identify ways in which cultural expectations can generate conflict and suggest appropriate responses.
Mean	2.61	6PO7	Demonstrate a basic knowledge of the procedures involved in onboarding and offboarding employees within organizations.
	Task Example		Make certain that incoming and outgoing employees are scheduled for orientation and complete required paperwork.
Mean	2.12	6PO8	Identify key elements of human resource law and the organizational impact.
	Task Example		Identify relevant components of basic US employment laws and regulations.
		<i>FINANCIAL FUNCTIONS</i>	
Mean	2.39	7PO1	Identify basic terminology associated with the financial functions of the organization.
	Task Example		Distinguish between terms such as assets, liabilities, overhead, and balance sheet.
Mean	2.68	7PO2	Demonstrate a knowledge of budgets and a financial statement.
	Task Example		Track expenses against an annual departmental budget.
Mean	2.07	7PO3	Identify important elements of the banking process and transactions.
	Task Example		Describe how to record, report, and document cash and checks.
Mean	2.04	7PO4	Demonstrate a basic knowledge of journal entries for financial transactions.
	Task Example		Identify main types of financial accounts (e.g., chart of accounts, accounts receivable).
Mean	1.91	7PO5	Describe the reconciliation process of both electronic transfers and bank statements.
	Task Example		Track electronic credits and debits to update an issued bank statement.
Mean	1.76	7PO6	Demonstrate knowledge of simple statistical analysis.
	Task Example		Interpret basic statistics, e.g., mean, median, and standard deviation.
Mean	1.72	7PO7	Demonstrate a basic knowledge in organizing, budgeting, and communicating with regard to charitable contributions.

	Task Example	Demonstrate a basic knowledge of US federal tax laws and regulation regarding charitable fundraising.
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## Changes in CAP Body of Knowledge Domains and Performance Outcomes

Table 11 lists the changes to performance outcomes that took place as a result of review of the data from the survey.

Table 11: Changes to Domains and Performance Outcomes Associated with Review of Survey Data

		<i>ORGANIZATIONAL COMMUNICATION</i>		
Mean	2.47	1PO6	<i>Demonstrate knowledge in the techniques of creating and giving presentations.</i>	<i>Statement modified from "Demonstrate knowledge in the techniques of speaking in public"</i>
		Task Example	<i>Prepare for and deliver a presentation.</i>	
		<i>BUSINESS WRITING AND DOCUMENT PRODUCTION</i>		
Mean	2.46	2PO5	<i>Describe the features and tools used desktop publishing (i.e. newsletters, flyers, etc.)</i>	<i>Statement modified from "Describe the technical aspects of office and web publishing (i.e. typefaces, printing styles, graphics, fonts, etc.)."</i>
		Task Example	<i>Identify important aspects of simple layout and design.</i>	
		<i>TECHNOLOGY AND INFORMATION DISTRIBUTION</i>		
Mean	2.36	3PO7	<i>Demonstrate basic knowledge in the use of different types of computer systems.</i>	<i>Statement modified from "Demonstrate basic knowledge in the use of different types of computer operating systems."</i>
		<i>OFFICE AND RECORDS MANAGEMENT</i>		
Mean	2.44	4PO3	<i>Demonstrate knowledge of both electronic and manual</i>	<i>Statement modified from "Demonstrate knowledge</i>



			<i>(paper) filing rules and standards based on ARMA guidelines.</i>	<i>of both electronic and manual (paper) filing rules and standards."</i>
Mean	2.36	4PO6	<i>Identify appropriate ergonomics for a productive personal workspace.</i>	<i>Statement modified from "Define the basics of creating functioning and productive workspaces."</i>
	Task Example		Identify elements of personal workspaces most essential to efficient working conditions.	
Mean	2.34	4PO8	<i>Identify the important methods of checking and maintaining office supplies.</i>	<i>Statement modified from "Identify the important methods of checking and maintaining inventory."</i>
	Task Example		Identify the steps involved in creating office inventory lists.	
Mean	2.21	4PO9	<b>Demonstrate knowledge of functioning in a virtual office.</b>	<b>Statement modified from "Demonstrate knowledge of forming a virtual office."</b>
	Task Example		Identify strategies for maintaining effective communication between on-site and virtual office employees.	
		<i>New Domain Six - Operational Functions</i>		
		Previous Domain Six and Seven PO numbers used for tracking, now comprise new Domain Six Operational Functions.		
Mean	2.3	6PO1	<i>Identify the basic terminology and job functions associated with human resources.</i>	<i>Statement modified, combining PO1 and 2.</i>
		Domain Six POs 3 and 4 deleted		
Mean	2.19	6PO5	<i>Describe the various methods of recruitment staffing, and hiring.</i>	

		Task Example	Define different interview types and process.	
		6PO8	DELETED	
Mean	2.39	7PO1	<i>Identify basic terminology associated with the financial functions of the organization.</i>	
		Task Example	Distinguish between terms such as assets, liabilities, overhead, and balance sheet.	
Mean	2.68	7PO2	<i>Demonstrate knowledge of budgets and financial statements.</i>	
		Task Example	Track expenses against an annual departmental budget.	
Mean	2.07	7PO3	<i>Identify important elements of the banking process and transactions.</i>	
		Task Example	<i>Describe how to record, report, and document cash and checks.</i>	
		7PO4-7	Domain Seven - PO 4-7 deleted	

## Determination of Examination Weights

The following table presents a number of pieces of data associated with content domain distribution. The first two columns are based on survey respondents' mean ratings for each content section based on the average importance for item ratings within content category. The column "Domain" lists the seven content domains going into the survey as well as the new domain "Operational Functions" that was designated to replace previous domains "Human Resources" and "Financial Functions." "Current Weight" is the percent domain distribution at the time of the survey. "Survey Recommendation" provides the average weights suggested by the survey respondents based on a holistic distribution of the seven content categories. The far right column gives the independent ratings of the JA committee members using the new six-category domain designations. The column immediately to the left of it provides the approved domain weighted percentages after webcast discussion.

Table 12: Current Domain Weightings, Input Data, and Committee Recommendations

Survey Rating	Survey Rank	Domain	Current Weight	Survey Recommendation	Webcast Decision	Focus Group Recommendation
2.97	3	Organizational Communication	25%	23.96%	24	24.25
3.12	1	Business Writing and Document Production	20%	20.46%	22	21.38
2.69	4	Technology and Information Distribution	15%	15.69%	16	17.38
2.62	5	Office and Records Management	15%	12.99%	15	14.50
3.04	2	Event and Project Management	12%	13.01%	12	11.88
		<b>Operational Functions (NEW)</b>			11	10.63
					<b>100.00</b>	<b>100.00</b>
2.44	6	Human Resources	8%	7.55%		no entry
2.08	7	Financial Functions	5%	6.47%		no entry
		<b>Total</b>	<b>100%</b>	<b>100%</b>		

## Recertification Questions

Although technically not part of the JA portion of the survey instrument, there were two additional questions regarding the respondent’s opinions on recertification, the first on frequency of recertification, and the second on number of hours that a CAP designee should participate in annually.

Table 13: How often should CAP designees recertify?

Number	Percent	Number of Years
103	9.97	2 years
175	16.94	3 years
80	7.74	4 years
675	65.34	5 years

Table 14 How many hours of continuing education annually to remain at CAP level of competency?

Number	Percent	Number of Hours
458	44.34	7-10
367	35.53	11-15
208	20.14	16-20

# Certified Administrative Professional (CAP) Exam Body of Knowledge

The Certified Administrative Professional (CAP®) is a professional certification geared toward office and administrative professionals. It is the only recognized professional certification in the administrative field that encompasses all areas of the profession. The tasks and responsibilities of those working in administrative professions are as varied and vast as the number of firms employing them. Whether a first-level support for the manager of a community non-profit, the project lead for a city in the Midwest, or the executive assistant to the chief executive officer of a Fortune 500, administrative professionals are required to possess many skills and talents.

The CAP exam is based on the CAP Body of Knowledge, which is developed by practicing professionals and business educators conducting a job analysis study. The goal of the study is to collect qualitative and quantitative data regarding practices conducted by administrative professionals then update the Body of Knowledge used to create the CAP exam to ensure it is clear, comprehensive, and reflective of current practice. This is done approximately every five years. \*

Under each of the six functional area domains are performance outcomes. Performance Outcomes (POs) are detailed, measurable competencies based on the most significant knowledge and skills the administrative professional should know to be successful in their positions, in support of the well-being of the organization. Under each PO are bullet points tying the competency to specific business and/or office functions.

\*A Job Analysis was conducted in Fall of 2017. This Body of Knowledge is applicable for the Fall 2018 CAP exam and subsequent exams, until another Job Analysis is conducted.

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## CAP Exam Domains

- 1. Organizational Communication 24%**
- 2. Business Writing and Document Production 22%**
- 3. Technology and Information Distribution 16%**
- 4. Office and Records Management 15%**
- 5. Event and Project Management 12%**
- 6. Operational Functions 11%**

Note – the percentages after each domain indicate how much of the exam covers that subject-matter. For example, approximately one-fourth of the questions on the CAP exam relate to Organizational Communication and its performance outcomes.

## CAP Core Resources\*

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Each domain lists subject-specific recommended readings; however, these four textbooks contain a wide variety of content covered on the CAP examination, thus are good general reference material when studying.

Bovee, C. L., and J. V. Thill. 2015. *Business Communication Today*, 13th Edition. Pearson Prentice-Hall

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Shockley-Zalabak, Pamela. 2014. *Fundamentals of Organizational Communication*, 9th Edition. Pearson.

Vermaat, M. E., S. L. Sebok, S. M. Freund, J. T. Campbell, and M. Frydenberg. 2016. *Enhanced Discovering Computers 2016*, 1st Edition. Cengage Learning.

\* Questions written for the CAP examination are referenced to one the CAP Core Resources and/or recommended readings (or similar texts on the topic from the same date range).

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## DOMAIN ONE: ORGANIZATIONAL COMMUNICATION

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### *Recommended Readings for Organizational Communication:*

Bovee, C. L., and J. V. Thill. 2015. *Business Communication Today*, 13th Edition. Pearson Prentice-Hall

Northouse, Peter. 2015. *Leadership: Theory and Practice*, 7th Edition. SAGE Publications, Inc.

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Shockley-Zalabak, Pamela. 2014. *Fundamentals of Organizational Communication*, 9th Edition. Pearson.

### *Related college courses:*

Business Communication

Introduction to Organizational Leadership

Principles of Business Management

Organizational Communication

### *PO 1: Describe the concepts and applications of communication, management, and leadership models/theories within organizations.*

- Identify the various types of communication (written, verbal, nonverbal, interpersonal, group, public) and which is the most effective for different business situations.
- Describe management/leadership theories and how they relate to effective organizational communication.
- Explain basic communication theories and their usage in the workplace.

### *PO 2: Describe the process of effective interaction with internal and external stakeholders of an organization.*

- Demonstrate a basic knowledge and proficiency in managing and resolving conflict within an organization.

*PO 3: Recognize the importance and utilization of professional networking.*

- Describe how networking (both in-person and virtual) has changed the way people find jobs and companies recruit new employees.

*PO 4: Demonstrate an understanding of team dynamics within organizations.*

- Identify the different types of teams and describe their purpose.
- Describe the specific kinds of dynamics within teams and how they can be managed.
- Demonstrate knowledge in effective decision-making, communication, and team building.

*PO 5: Describe the positive and negative types of interpersonal interactions existing within an organization.*

- Explain how human motivation affects organizational dynamics.
- Demonstrate basic knowledge of the differences between managing and leading.
- Explain the dynamics of mentorship and coaching, including the effect on performance.

*PO 6: Demonstrate knowledge in the techniques of creating and giving presentations.*

- Describe how to apply methods of coping with communication anxiety.
- Identify the different types of presentations and appropriate usage of each.
- Demonstrate knowledge of how to prepare for and deliver a presentation.

*PO 7: Demonstrate the ability to conduct business with diverse cultures.*

- Describe international business practices with regard to cultural norms and rituals.
- Demonstrate knowledge of the importance of multi-cultural communication in today's workplace.

*PO 8: Demonstrate a basic knowledge in organizational structure, systems, and strategies including their role in productivity and effective management.*

- Describe the parts of a strategic plan and how it affects organization performance.
- Define various organization management systems that examine productivity (such as Six Sigma and TQM)

*PO 9: Describe how confidentiality, legality, and ethics are important for the functioning of an organization.*

- Understand basic employer and employees' rights with regard to legality.

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## DOMAIN TWO: BUSINESS WRITING AND DOCUMENT PRODUCTION

### *Recommended readings for Business Writing and Document Production:*

Guffey, M. E., and D. Loewy. 2015. *Essentials of Business Communication*, 10th Edition. South-Western Publishing Co. Smith, L.R.

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Smith, L. R., R. Moore. 2013. *English for Careers: Business, Professional and Technical*, 11th Edition. Pearson Prentice- Hall.

### *Related college courses:*

Business English

Business Communication

Introduction to Word Processing

Desktop Publishing for the Office

### *PO 1: Demonstrate knowledge of terminology associated with business writing and document production.*

- Identify the different functions of correspondence, documents, and reports within an organization.
- Describe which method is best for creating and distributing reports and documents within an organization.

### *PO 2: Exhibit proficiency in proofreading and editing documents.*

- Demonstrate knowledge of document readability for business communication.
- Identify and describe the most important steps when editing and proofreading.
- Apply the basics of copy editing for various types of documents.

### *PO 3: Demonstrate proficiency in the use of grammar, spelling, and sentence construction.*

- Demonstrate ability to apply basic rules of English grammar, especially spelling, punctuation, capitalization, and sentence construction.

### *PO 4: Describe the steps required to create and edit different types of business documents.*

- Demonstrate an ability to determine and develop materials for the appropriate audience for different types of business documents.
- Knowledge of which software applications are appropriate to produce common business documents (e.g., MS Word, MS Publisher, Adobe Acrobat).
- Demonstrate proficiency in spreadsheet creation, including simple formulas and data manipulation.
- Understand the application and usage of presentation software (e.g. MS PowerPoint, Prezi, etc.).

### *PO 5: Describe the features and tools used in desktop publishing (i.e. newsletter, flyers, etc.).*

- Knowledge of desktop design software including features and functions.

- Identify important aspects of layout and design.
- Demonstrate a familiarity with online tools for web publishing.
- Recognize basic graphic design tools for office and web publishing.

*PO 6: Identify the necessary elements needed to create and present effective charts and graphs.*

- Demonstrate knowledge of software applications used to create, format, and insert charts, tables, and graphs into business documents and presentations.

*PO 7: Identify the important elements necessary for finishing a document (e.g. binding, collation, stapling, coloring, graphics, etc.).*

- Describe the key differences and requirements for electronic versus hardcopy output of documents.

*PO 8: Demonstrate proficiency in the creation of minutes for meetings.*

- Identify how to prepare minutes for a meeting, capturing the essence of agenda items and actions taken.

## DOMAIN THREE: TECHNOLOGY AND INFORMATION DISTRIBUTION

*Recommended readings for Technology and Information Distribution:*

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Vermaat, M. E., S. L. Sebok, S. M. Freund, J. T. Campbell, and M. Frydenberg. 2016. *Enhanced Discovering Computers 2016*, 1st Edition. Cengage Learning.

*Related college courses:*

Business Computer Applications  
 Business Office and Administrative Procedures  
 Introduction to Computing

*PO 1: Describe the process of information distribution within an office environment.*

- Demonstrate knowledge in how to organize distribution lists for various types of communications.

*PO 2: Identify the important differences between traditional and electronic distribution of information.*

- Demonstrate knowledge and proficiency of different email interface types.
- Know what software and technology is available for distributing information.

*PO 3: Identify copyright laws, regulations regarding intellectual property, and ways to maintain confidentiality when distributing information.*

- Identify proper attribution of quotes from published documents.



*PO 4: Describe the process and techniques of gathering, compiling, and analyzing data.*

- Knowledge of which software applications are appropriate for compiling, storing, and analyzing data.
- Demonstrate a clear understanding of which data is appropriate to collect and why.
- Demonstrate a proficiency in creating a well-organized report with regard to organization and data visualization.

*PO 5: Demonstrate knowledge in the use of the Internet, including social media, as a way of distributing information.*

- Identify and describe the important characteristics of sending email (e.g., etiquette, attachments, formatting, etc.).
- Demonstrate knowledge and proficiency in social media usage and etiquette.
- Knowledge of which social media applications are appropriate for a specific task and how to use them.

*PO 6: Demonstrate basic knowledge in the installation, maintenance, and troubleshooting of both equipment and software.*

- Identify various computer hardware used in an office.
- Demonstrate knowledge of basic office software and functions.
- Identify available online resources for equipment and software training and usage.

*PO 7: Demonstrate basic knowledge in the use of different types of computer systems.*

- Identify potential issues with compatibility of different operating systems, such as Microsoft and Apple.

*PO 8: Describe common ways of storing and transferring data and the types of media appropriate for each.*

- Demonstrate knowledge and proficiency in identifying file types and the appropriate ways of converting documents.
- Knowledge of software programs used for document conversion.
- Identify and describe common procedures of backing up electronic information and databases.

*PO 9: Explain appropriate security procedures for maintaining, backing up, and storing information.*

- Demonstrate knowledge of legal issues regarding the storing of electronic information.

## DOMAIN FOUR: OFFICE AND RECORDS MANAGEMENT

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### *Recommended readings for Office and Records Management:*

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Read, J. and M. L. Ginn. 2015. *Records Management*. Thompson/South-Western Publishing.

### *Related college courses:*

Records Management

Business Office and Administrative Procedures

### *PO 1: Demonstrate knowledge of basic terminology associated with records management using ARMA Guidelines.*

- Knowledge of terms such as metadata, records retention, and data archiving.
- Demonstrate familiarity with terms used by ARMA and general records management.

### *PO 2: Identify the key advantages and disadvantages of electronic and manual (paper) file management based on ARMA Guidelines.*

- Demonstrate usage of both paper and electronic filing systems as appropriate based on access requirements and organizational needs.

### *PO 3: Demonstrate knowledge of both electronic and manual (paper) filing rules and standards based on ARMA Guidelines.*

- Describe types of electronic files, naming conventions, options for accessing, and methods of altering information.
- Knowledge of available software, systems, and services for electronic filing.
- Describe the different methods for creating, storing, and retaining files.

### *PO 4: Identify the appropriate security for both electronic and manual files.*

- Identify the key laws regarding record storage and confidentiality.
- Describe both the strengths and weaknesses of types of record and file security.

### *PO 5: Demonstrate knowledge of file retrieval, maintenance, and retention.*

- Describe how to develop a record retention schedule for files both electronic and paper.

### *PO 6: Identify appropriate ergonomics for a productive personal workspace.*

- Describe the significant elements of workspaces and why they are important to efficient and effective working conditions.

*PO 7: Demonstrate knowledge of resources necessary to efficiently manage an office.*

- Describe the steps in placing and receiving supply orders.
- Describe the process of creating and distributing a Request for Proposal (RFP).

*PO 8: Identify the important methods of checking and maintaining office supplies.*

- Identify the steps involved in creating inventory lists.
- Recognize types of software appropriate for maintaining inventory.

*PO 9: Demonstrate knowledge of functioning in a virtual office.*

- Identify both the advantages and disadvantages of virtual offices versus traditional offices.

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## DOMAIN FIVE: EVENT AND PROJECT MANAGEMENT

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*Recommended readings for Event and Project Management:*

Rankin, D., and K. Shumack. 2017. *The Administrative Professional: Technology and Procedures*, 15th Edition. Cengage Learning.

Scholar, D., and S. Losurdo. 2014. *Meeting and Event Planning Playbook: Meeting Planning Fundamentals*. CreateSpace.

*Related college courses:*

Basics of Project Management

Event Management

*PO 1: Demonstrate knowledge of basic terminology associated with event management.*

- Identify the necessary elements in planning events ranging from internal meetings to external conferences.

*PO 2: Demonstrate proficiency in travel preparation.*

- Describe the necessary elements for planning and organizing travel, both domestically and abroad.

*PO 3: Describe the key requirements for meetings both in person and virtual.*

- Describe the steps required in the organization and planning of professional meetings.
- Knowledge of which software applications are appropriate for online meetings.

*PO 4: Demonstrate knowledge in prioritizing and delegating elements of a project from planning to implementation.*

- Identify and describe the important techniques of time management from the planning stage to the implementation of a project.
- Demonstrate the ability to identify and evaluate the skills and competencies of others for project delegation.

*PO 5: Describe the steps required in organizing, planning, and managing a project.*

- Identify which software and technology tools are appropriate for managing a project.
- Demonstrate knowledge of negotiating, budget review, and bill explanation when organizing a project.
- Demonstrate proficiency in prioritizing and organizing work tasks.

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## DOMAIN SIX: OPERATIONAL FUNCTIONS

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*Recommended readings for Operational Functions:*

Dessler, Gary. 2016. *Human Resource Management*, 15th Edition. Pearson Prentice-Hall.

Piper, M. 2013. *Accounting Made Simple: Accounting Explained in 100 Pages or Less*. Simple Subjects, LLC.

Siciliano, G. 2014. *Finance for Nonfinancial Managers*, Second Edition (Briefcase Books Series). McGraw-Hill Education.

*Related college courses:*

Human Relations

Introduction to Business

Introductory Accounting

*PO 1: Identify the basic terminology and job functions associated with human resources.*

- Identify different forms of harassment in the workplace.
- Describe the ways to address employee situations professionally and legally.
- Identify ways to and the importance of following organizational policies and procedures.
- Demonstrate knowledge of and purpose for performance evaluations.

*PO 2: Describe the various methods of recruitment, staffing, and hiring practices.*

- Define different interview types and process.
- Demonstrate the ability to determine the staffing requirements of an organization.

*PO 3: Recognize why cultural and generational diversity is important for organizations.*

- Describe how differing cultural and generational perspectives can benefit an organization.
- Identify ways in which cultural diversity can generate conflict and describe how it can be reduced.
- Identify what should be included in diversity training within an organization.

*PO 4: Demonstrate a basic knowledge of the procedures involved in onboarding and offboarding employees within organizations.*

- Describe the process of scheduling orientation and completing required paperwork.

*PO 5: Identify basic terminology associated with the financial functions of the organization.*

- Distinguish between terms such as assets, liabilities, overhead, and balance sheet.
- Describe the key differences between a budget, a profit and loss statement, and a statement of cash flows.

*PO 6: Demonstrate a knowledge of budgets and financial statements.*

- Describe how to track electronic credits and debits on bank statements.
- Demonstrate a proficiency in how to read a financial statement.
- Describe the process of creating, tracking, and balancing a budget.
- Identify the procedures and management of petty cash.

*PO 7: Identify important elements of the banking process and transactions.*

- Identify the appropriate forms for depositing, withdrawing, and transferring cash.
- Describe how to record, report, and document cash and checks.
- Describesafeandsecuremoney-handlingprocedures.