IAAP's CAP Study Group

FACILITATOR TOOLKIT

BASED ON THE CAP EXAM STUDY GUIDE, 4TH EDITION

Role & Requirements

The role of the study group facilitator is to foster independent learning among the participants preparing to sit for the IAAP CAP exam. Don't plan to teach the material; your role is to assist with the study process by providing structure and resources.

Facilitators should be well-versed on the *CAP Body of Knowledge (BOK)* subject-matter. Even though the goal of the group is not teaching, the facilitator should direct candidates to the best resources and answer their questions adequately.

If your study group is open to the public, please notify IAAP's certification department to include it on the certification website. IAAP cannot endorse any particular study group or prep course; however, we do list all known study groups and preparation courses to allow candidates to determine the resources that are right for them.

All study group facilitators must abide by the IAAP Code of Conduct to ensure a positive learning environment for each candidate.

Things to consider

1. Where will the group meet?
2. When should the group meet (mornings, evenings, weekends, etc.)?
3. Who will attend and how many individuals?
4. How will you inform potential participants of your group?
5. What resources do you need to help them prepare?

Suggested Steps for Study Group Set-Up

✓ **Step One:** Analyze your familiarity with the current CAP exam.

- Download the current *IAAP CAP Body of Knowledge (BOK)* – are you comfortable with the subjects covered in the Performance Outcomes (PO)?

- Purchase the Certified Administrative Professional *(CAP) Exam Study Guide, 4th Edition* from IAAP.

- Are there any areas that you need to brush up on to effectively facilitate discussion? If so, you may want to purchase or rent some of the recommended textbook references listed in the BOK. Participants will turn to you for guidance, so you need to be familiar with all resources.

- Keep in mind, your study group participants will be from all backgrounds with different levels of experience and education; be patient and understanding with each study group participant.

✓ **Step Two:** Select a location.

Here are some considerations to keep in mind:

- What are your requirements for a location?
  - Do you need Internet access?
  - Will you need audio/visual?
  - How big of a room and what type of layout?

- Are you meeting face-to-face, virtually, or both? If you need virtual interaction, what are your options?

  - Webinar Software
  - Discussion Forums

- Check with educational institutions or businesses in your city for free facilities.

✓ **Step Three:** Inform potential candidates in your area of the study group if it is open to the public.

Here are some recommendations:

- Notify both the Region and Branch Director in your area.

- Notify IAAP's certification department to post your study group on the certification website

- Disseminate information via social media – Facebook, Twitter, LinkedIn, etc.

✓ *Step Four:* Plan your study group sessions.

As the facilitator, you should:

- Have measurable outcomes for your group, so you can gauge its success.

- Reiterate this is a study group – not a preparation course. Outside study is necessary for each group member. Some participants will want to rely entirely on the study group to prepare for the exam and will need constant reinforcement to engage in additional learning.

- Establish the schedule and a calendar of review topics (we've included a sample one below; feel free to use it!). Divide up the CAP Body of Knowledge Performance Outcomes into digestible segments for weekly reviews and activities.

- The 6 CAP Domains are not weighted equally on the exam so time needs to be allocated accordingly:

  Organizational Communication 24%
  Business Writing and Document Production 22%
  Technology and Information Distribution 16%
  Office and Records Management 15%
  Event and Project Management 12%
  Operational Functions 11%

- Remember, the exam is computer-based so candidates need to practice reading and taking quizzes online; you usually read slower on a computer screen.

✓ *Step Five:* Select your facilitator resources and resources for participants.

- All participants need the IAAP CAP Body of Knowledge (BOK) and purchase the The Certified Administrative Professional (CAP) Exam Study Guide, 4th Edition, since it is aligned with the BOK.

- If possible, include access to the CAP Core Resources for all study group members.

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

  - Colquitt, J. A., LePine, J. A., and M. Wession. Organizational Behavior: Improving Performance and Commitment in the Workplace, 5th Edition. McGraw-Hill, 2017.

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

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

- Research adult learning activities that cater to the identified styles of your participants.

- Create visual aids to encourage active participation and discussion, such as PowerPoint, Prezi, handouts, flash cards, etc.

- Invite guest speakers that are subject-matter experts in areas of the BOK.

16-Week Sample Study Group Calendar

Week 1   IAAP Website, Study Guide Intro

Welcome, Introductions, Overview of CAP Exam, Body of Knowledge, and Study Group Format

Week 2   Study Guide Chapter 1

Evaluate Participant Learning Styles, Complete the CAP Body of Knowledge Self-Assessment

Week 3   BOK Domain 1 PO 1-3; Chapter 2

PO 1: Describe the concepts and applications of communication, management, and leadership models/theories within organizations.
PO 2: Describe the process of effective interaction with internal and external stakeholders of an organization.
PO 3: Recognize the importance and utilization of professional networking.

Week 4   BOK Domain 1 PO 4-6; Chapter 2

PO 4: Demonstrate an understanding of team dynamics within organizations.
PO 5: Describe the positive and negative types of interpersonal interactions existing within an organization.
PO 6: Demonstrate knowledge in the techniques of creating and giving presentations.

Week 5   BOK Domain 1 PO 7-9; Chapter 2

PO 7: Demonstrate the ability to conduct business with diverse cultures.
PO 8: Demonstrate a basic knowledge in organizational structure, systems and strategies including their role in productivity and effective management.
PO 9: Describe how confidentiality, legality, and ethics are important for the functioning of an organization.

Week 6   BOK Domain 2 PO 1-4; Chapter 3

PO 1: Demonstrate knowledge of terminology associated with business writing and document production.
PO 2: Exhibit proficiency in proofreading and editing documents.
PO 3: Demonstrate proficiency in the use of grammar, spelling, and sentence construction.
PO 4: Describe the steps required to create and edit different types of business documents.

Week 7   BOK Domain 2 PO 5-8; Chapter 3

PO 5: Describe the features and tools used in desktop publishing for newsletter, flyers, etc.

PO 6: Identify the necessary elements needed to create and present effective charts and graphs.
PO 7: Identify the important elements necessary for finishing a document (e.g., binding, collation, stapling, coloring, graphs, etc.)
PO 8: Demonstrate proficiency in the creation of minutes for meetings.

Week 8   BOK Domain 3 PO 1-5; Chapter 4

PO 1: Describe the process of information distribution within an office environment.
PO 2: Identify the important differences between traditional and electronic distribution of information.
PO 3: Identify copyright laws, regulations regarding intellectual property, and ways to maintain confidentiality when distributing information.
PO 4: Describe the process and techniques of gathering, compiling, and analyzing data.
PO 5: Demonstrate knowledge in the use of the Internet, including social media, as a way of distributing information.

Week 9   BOK Domain 3 PO 6-9; Chapter 4

PO 6: Demonstrate basic knowledge in the installation, maintenance, and troubleshooting of both equipment and software.
PO 7: Demonstrate a basic knowledge in the use of different types of computer systems.
PO 8: Describe common ways of storing and transferring data and the types of media appropriate for each.
PO 9: Explain appropriate security procedures for maintaining, backing up, and storing information.

Week 10   Review of Domains 1-3

Review content

Week 11   BOK Domain 4 PO 1-5; Chapter 5

PO 1: Demonstrate knowledge of basic terminology associate with records management using ARMA Guidelines.
PO 2: Identify the key advantages and disadvantages of electronic and manual (paper) file management based on ARMA Guidelines.
PO 3: Demonstrate knowledge of both electronic and manual (paper) filing rules and standards based on ARMA Guidelines.
PO 4: Identify the appropriate security of both electronic and manual files.
PO 5: Demonstrate knowledge of file retrieval, maintenance, and retention.

Week 12   BOK Domain 4 PO 6-9; Chapter 5

PO 6: Identify appropriate ergonomics for a productive personal workspace.
PO 7: Demonstrate knowledge of resources necessary to efficiently manage an office.

PO 8: Identify the important methods of checking and maintaining office supplies.
PO 9: Demonstrate knowledge of functioning in a virtual office.

Week 13   BOK Domain 5 PO 1-5; Chapter 6

PO 1: Demonstrate knowledge of basic terminology associated with event management.
PO 2: Demonstrate proficiency in travel preparation.
PO 3: Describe the key requirements for meetings both in person and virtual.
PO 4: Demonstrate knowledge in prioritizing and delegating elements of a project from planning to implementation.
PO 5: Describe the steps required in organizing, planning, and managing a project.

Week 14   BOK Domain 6 PO 1-4; Chapter 7

PO 1: Demonstrate knowledge in the duties and processes of human resources.
PO 2: Describe the various methods of recruitment, staffing, and hiring practices.
PO 3: Recognize why cultural and generational diversity is important for organizations.
PO 4: Demonstrate a basic knowledge of the procedures involved in onboarding and offboarding employees within organizations.

Week 15   BOK Domain 6 PO 5-7; Chapter 8

PO 5: Identify basic terminology associated with the financial functions of the organization.
PO 6: Demonstrate a knowledge of budgets and financial statements.
PO 7: Identify important elements of the banking process and transactions.

Week 16   Review of Domains 4 - 6

Review content; complete CAP Practice Exam

IAAP Code of Conduct

IAAP members, recognized components, Board of Directors and Headquarters Staff will exhibit the highest standards of integrity through core values; ethical presentation; and transparent demonstration of financial stewardship.

To join IAAP is to commit to act in accordance with its core values and to encourage the development and implementation of the ethical standards within the administrative profession and all industries represented by its members.

The Code of Conduct embodies the aspirational core values of IAAP. The core values describe the conduct that individuals strive to uphold as IAAP members. Although adherence to these core values is not easily measured, conducting ourselves in accordance with these standards is an expectation that members have of themselves as professionals. Among the core values with which this Code of Conduct aligns are those of Integrity, Transparency, Excellence and Collaboration.

IAAP Core Values

Integrity: Demonstrated by honesty, accountability and ethical behavior consistent with an abiding respect for the dignity and value of individuals.

Transparency: Demonstrated through listening, understanding and responding to member and stakeholder feedback.

Excellence: Demonstrated by quality resources that support growth and development of the individual and the profession.

Collaboration: Demonstrated by an inclusive culture that appreciates the value of diverse perspectives, the power of common vision, and equality among peers.

Ethical Standards

In addition to these core values, IAAP members seek to maintain the highest of ethical standards, including: to respect and uphold public laws that govern their work; being honest in conducting all business; respecting the confidentiality of information gained through their work; acting fairly; fostering an ethical, inclusive, and diverse culture; and taking responsibility for their conduct.

1. Respect and uphold public laws that govern my work.

   • Know and abide by the laws and regulations that govern the organization you're employed by and those of IAAP.
   • Encourage all stakeholders to respect and uphold the law.
   • Ensure all contractual dealings are conducted fairly and in compliance with the law.

2. Be honest

   • Strive to create an environment in which others feel safe to tell the truth.
   • Be honest and accurate in my communications and in my conduct particularly when describing my knowledge, experience, expertise and credentials.
   • Demonstrate transparency in my decision-making process and disclose all potential and actual conflicts of interest.
   • Negotiate in good faith and provide all information material to the terms of the contract to the persons with whom I am negotiating.

3. Respect the confidentiality of information

   • Disclose confidential information only with written authorization or when required by law.
   • Protect confidential information including after service has ended.

4. Act fairly

   • Serve the interest of my organization and profession through fair, honest and courteous dealings that help advance the administrative profession.
   • Represent my organization at all times in a manner that reflects positively on the organization.

- Hold foremost the interest of the organization that employs me and its industry or profession; faithfully executing my duties and never using my position for undue personal gain and promptly and completely disclosing to appropriate parties all potential and actual conflicts of interest.
- Avoid taking an unfair advantage of another person or entity through manipulation, concealment, abuse of privileged information, misrepresentation of material facts, or any other unfair-dealing practice.
- Provide sufficient information needed to others to make an informed decision.
- Approach directly those persons with whom I have a conflict or disagreement, when appropriate.
- Conduct myself in a professional manner in all circumstances.
- Maintain and constantly reexamine my impartiality and objectivity, taking corrective action as appropriate.

5. Foster an ethical, inclusive, and diverse culture

- Model and encourage the integration of ethics into all aspects of my work.
- Employ practices that exemplify "social responsibility" as it pertains to both human and environmental conditions.
- Respect diversity and foster inclusion in all aspects of my work.
- Build strong relationships with all to enable a culture of integrity and uncompromising ethics.
- Inform myself about the norms and customs of others and avoid engaging in behaviors they might consider disrespectful.
- Listen to others' points of view, seeking to understand them.
- Provide accurate information in a timely manner.
- Make commitments and promises, implied or explicit, in good faith.

6. Take responsibility for my conduct

- Exhibit professional conduct that is a credit to IAAP, the profession, my employer and me, and strive to continually advance my knowledge and achieve higher levels of excellence in my profession.