

AN ANALYSIS OF COMPETENCIES  
PERFORMED BY ADMINISTRATIVE PROFESSIONALS  
FOR THE ADMINISTRATIVE ASSISTANT DEGREE PROGRAM  
AT CHIPPEWA VALLEY TECHNICAL COLLEGE

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A Research Report Submitted in  
Partial Fulfillment of the Requirements for the  
Degree of Education Specialist  
With a Major in Industrial and Vocational Education

Approved: 6 Semester Credits

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ABSTRACT

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An Analysis of Competencies Performed by Administrative Professionals for the  
Administrative Assistant Degree Program at Chippewa Valley Technical College  
(Title)

Industrial & Vocational Education	Dr. Howard Lee	July, 2001	178
(Graduate Major)	(Research Advisor)	(Month/Year)	(No. of Pages)

American Psychological Association (APA) Publication Manual, Fourth Edition  
(Name of the Style Manual Used in this Study)

The purpose of this research was to provide data for the Administrative Assistant degree program at Chippewa Valley Technical College (CVTC). Two groups were surveyed within the Eau Claire region to identify job competencies of administrative professionals, determine present and future software and technology needs for the profession, and identify present and future job titles of administrative professionals. The populations surveyed included attendees from the 2000 and 2001 IAAP Office Personnel Seminars, the mailing list for the UW-Stout Administrative Professionals luncheon, and attendees of the 2001 UW-Stout Administrative Professionals luncheon.

This study identified specific competencies that are currently being performed by administrative professionals working in businesses in west central Wisconsin. Many of the competencies traditionally thought of as administrative assistant duties, are overwhelmingly still performed by administrative professionals. The results confirmed

that administrative professionals are responsible for performing a variety of organizing and planning functions within the company, maintaining equipment and supplies, managing records and files, distributing information, and producing a vast assortment of documents. Furthermore, administrative professionals must have excellent communication skills because of their interaction with clients, colleagues, and the community.

The study also verified the present software and technology needs of administrative professionals in the Eau Claire area. Administrative professionals are currently using CD-RW drives, scanners, digital cameras, meeting software, forms software more than some of the other progressive technologies and software. Many administrative professionals are conducting Internet research and some are responsible for designing and updating Web pages. However, evidence gathered suggests that use of advanced and innovative software applications by administrative professionals is not prevalent.

The future software needs of administrative professionals as indicated by this study are software applications that aids in the performance of accounting functions, desktop publishing, web page design, project management, as well as meeting software and forms software. The expected technology needs of administrative professionals included digital cameras, personal digital assistants, and CD read/write drives.

In addition, the study identified present job titles and explored the preferred use of contemporary and progressive job titles for this occupation. The results proved that administrative professionals work under a variety of different job titles. Respondents

were not dissatisfied with the title of administrative assistant. There was no consensus on a preferred job title for this occupation.

Finally, the correlations between administrative assistant competencies and present and future software and technology needs of administrative assistants based on demographics were examined. There were some differences in performance of competencies by administrative professionals based on demographic criteria. Depending on the size of the organization and type of business, administrative professionals may perform more financial functions, computer hardware and software responsibilities, and assume supervisory roles.

Information obtained from this study will be used to assist the Business Technology Department in determining which competencies to include within the Administrative Assistant program and to determine if a program revision and/or name change is warranted. The information gathered supports the development of progressive, new curriculum and program changes within the department. The data justifies the budgeting for updated and additional equipment purchases to aid instructors in delivering courses and in order to maximize the potential for relevant student learning. The data provided is also necessary to accurately assess student learning within the Administrative Assistant program at CVTC. This research helps the Business Technology Department maintain conformity with the mission statement of the college by insuring that the Administrative Assistant degree program satisfies the workforce demand of businesses in the region. This study addresses the concern about removing the stereotype of “secretary” and provides information for the Wisconsin Technical College System to consider a program revision and/or title change.

## Acknowledgements

In reflecting on my graduate studies, it is evident that my achievements would not be possible without the support, understanding, and love of some very important people.

Dr. Howard Lee, my research advisor and mentor, who has monitored my progress through and within the Stout culture since my undergraduate days and who directed me toward higher expectations and achievements.

Brenda Thalacker, who just mentioned that she was taking classes toward Stout's Ed.S. degree, which provoked me to eagerly pursue and rapidly complete the degree. We often finish each other's sentences and have so much in common. I'm glad that we are friends and will graduate together. I couldn't let you get ahead of me, you know!

My parents, Jan and Ron Hastings, for instilling in me the importance of education and for always being there for my family and me. My grandmother, Anne Gaard, you are a remarkable woman with a very special place in my heart. In loving memory of my grandparents who have guided me from above.

My husband, Andres, your endless love, understanding, and tolerance have enabled me to pursue another degree. My beautiful daughters, Jada and Brenna, who are full of so much enthusiasm and energy that you always make me laugh when I get too serious. Thank you Jada for quitting your preschool game on the computer when Mommy needed to work on her paper and, in the 11<sup>th</sup> hour of my thesis marathon, for asking "can I read your paper when you're done?" Thank you Brenna for getting toilet trained so quickly and while I was waiting for the survey data to be inputted. Your effort and accomplishment was ideally timed. I realize that the last 19 months have not been easy but finally we can focus on spending more quality time together as a family.

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## Chapter 1

### Introduction

#### Background

Society is living in the technological age of constant change. Technology and information surround everyone in some form, no matter who they are, where they live or what they do for a living. In some cases, technology and information can overwhelm and almost consume society. Informational and technological change is inevitable.

The world of business in the 21<sup>st</sup> century is also changing at a rapid pace. Use of computers and the Internet in performing daily business functions is widespread. Other office technologies such as palm pilots, scanners, and digital cameras have also become commonplace. In fact, graphics and other business documents that are reproduced using these modern technologies can be very difficult, if not impossible, to distinguish from the original.

These changes occur in many business environments, including how individuals function in offices on a daily basis. As a result, the role of the traditional office secretary is being transformed. In the past, a secretary was commonly stereotyped as the person in the office who typed and filed correspondence and answered the telephone. Today that role is being converted into a profession where individuals utilize more technological and information management skills (IAAP On-line). As a result, members of the Professional Secretaries International (PSI) organization voted in 1998 to change their association's name to International Association of Administrative Professionals (IAAP). Consequently, the job title of "secretary" is changing to more accurately describe the contemporary,

professional job functions that are now being performed in offices around the globe. According to the International Association of Administrative Professionals, titles such as “administrative professional”, “office coordinator”, “executive assistant”, and “information coordinator” are more appropriate alternatives (IAAP On-line and OfficeTeam On-line). The IAAP (On-line) recommends using the title of “administrative professional” to reflect the expanding job responsibilities. In addition, the CVTC Business Technology Advisory Committee (2000) recommended a change in the Administrative Assistant program title “to better reflect the changing nature of the program and to attract males.” The title of information assistant was suggested.

Individuals in business environments must acquire knowledge and skills to use the latest information and technologies to perform daily responsibilities effectively and efficiently. Administrative professionals are certainly not exempt from this standard. In fact, administrative professionals are often among first employees within an organization to adopt and use new technology (Miller, 1997). According to the IAAP, one of the key expectations employers have of their administrative staff is that they be skilled in new and emerging technology and management functions (IAAP On-line).

One of the greatest challenges for instructors in technical education is to keep curriculum up-to-date with the latest business and technology trends. The Mission Statement of Chippewa Valley Technical College is “to deliver superior, progressive technical education which improves the lives of students, meets the workforce needs of the region, and strengthens the larger community” (CVTC On-line). In order to continue compliance with the college’s mission statement, the Administrative Assistant degree

program at Chippewa Valley Technical College (CVTC) needs modernization. For example, the Business Technology Department, which houses the program, still teaches courses such as keyboarding, Microsoft Windows, machine transcription, and electronic calculator operations, just to name a few. Skills such as keyboarding and use of the Windows operating system are being learned in K-12 schools, perhaps years before they enter into an education at CVTC. In fact, due to the declining enrollment in Windows classes, five programs at CVTC have dropped the class from their curriculums. Although keyboarding is the basic foundation for more comprehensive computer skills, little time is left in the curriculum for keyboarding (Olinzock, 1998). For that reason, the Business Technology Advisory Committee (2000) approved the elimination of keyboarding from the Administrative Assistant program curriculum. Technology such as speed typing and voice recognition software has taken the place of the former administrative art known as shorthand (Trujillo, 2000). Thus freeing up classroom time for the learning and mastery of more advanced, high-tech skills and proficiency in progressive software programs.

### Statement of the Problem

Chippewa Valley Technical College needs to determine competencies performed by administrative professionals for the purpose of updating its Administrative Assistant degree program and curriculum. The most recent formal competency study, a DACUM, for the program was completed in April 1994.

### Purpose of the Study

The main purpose of this research is to identify administrative assistant competencies in businesses in the Eau Claire region for the Administrative Assistant program at Chippewa Valley Technical College. The results of the study will identify specific skills, job tasks, and functions that are currently being performed by administrative professionals working in businesses in West Central Wisconsin. In addition, this research will determine the present and future software and technology needs of administrative professionals in the Eau Claire area. Moreover, the study will identify present job titles and explore the future use of contemporary and progressive job titles for this occupation in the Eau Claire region. Furthermore, this research will determine if there is a difference in administrative assistant competencies and present and future software and technology needs of administrative assistants based on demographics in the Eau Claire region. Finally, it will recommend a universal name change and/or a change of focus for the Administrative Assistant programs within the Wisconsin Technical College System (WTCS).

### Research Objectives

This research will address the following objectives:

1. Identify administrative assistant competencies in the Eau Claire region.
2. Determine the present and future software and technology needs of administrative professionals in the Eau Claire region.
3. Identify present and future job titles of administrative professionals in the Eau Claire region.

4. Determine if there is a difference in administrative assistant competencies and present and future software and technology needs of administrative professionals based on demographics in the Eau Claire region.

### Justification for Research

A study of the competencies performed by administrative professionals can be justified on several levels:

1. Due to the rapid growth and development of technology and use of information in business, administrative professionals must be proficient at understanding and utilizing technological innovations and perform higher administrative and informational functions than they have in the past. Administrative professionals cannot be negligent about learning or using new technology or software. In fact, administrative professionals should be proactive in the areas of informational and technological literacy in order to be successful in the field. Therefore, it is necessary to study which technological advancements are being utilized in offices so that administrative professionals and students can be adequately prepared to use these innovations.
2. Data from this research will assist the Business Technology Department in determining which competencies to include within the Administrative Assistant program and to determine if a program revision and/or name change is warranted. The information gathered is critical to support the development of progressive, new curriculum and program changes within the department.

3. The data generated will justify the budgeting for updated and additional equipment purchases to aid instructors in delivering courses and in order to maximize the potential for relevant student learning.
4. The data provided by this research is also necessary to accurately assess student learning within the Administrative Assistant program at CVTC.
5. This research will help the Business Technology Department maintain conformity with the mission statement of the college by insuring that the Administrative Assistant degree program satisfies the workforce demand of businesses in the region.
6. This study will address the concern among individuals in the clerical profession and instructors in this area about removing the stereotype of “secretary” and justifying a Wisconsin Technical College System program revision and/or title change.

### Significance of the Study

This study is important to administrative professionals and technical education for the following reasons:

1. This study reinforces the partnership between Chippewa Valley Technical College and businesses within the region.
2. This study strengthens the relationship between the Wisconsin Technical College System and businesses within the state.
3. The Chippewa Valley Technical College Administrative Assistant program will be more attractive to potential students for the purpose of increasing and

updating professional skills. This will assist in attempts to increase enrollment in the program.

4. The faculty teaching in the Administrative Assistant program at Chippewa Valley Technical College will be provided opportunities for staff development to continually update their knowledge and expertise of current business practices and technologies.
5. Other technical colleges across Wisconsin can use this data to update their programs.

#### Limitations of the Study

1. This study will be restricted to the profession of administrative assistants in the state of Wisconsin. Administrative professionals outside the state of Wisconsin will not be surveyed as part of this research.
2. This analysis will be restricted to the general profession of administrative assistants. It will not include analysis of specialized fields such as legal or medical secretaries.
3. The application of this research will be limited to influence only students attending Chippewa Valley Technical College in the Administrative Assistant degree program. The researcher does not guarantee that other technical colleges in Wisconsin will utilize the data.
4. The research will utilize a survey that has been developed by the researcher. The presence of the human element indicates that the survey may contain

errors, misinterpretations, misstatements, or omissions not intended by the researcher.

5. The survey results are limited to the opinions and answers revealed by the respondents. Opinions and answers of respondents may be influenced by factors independent of this research and not disclosed to the researcher as part of this study.
6. This study will not investigate if the competencies identified as being performed by administrative professionals are taught in existing courses within the Administrative Assistant degree program at CVTC. Independently, upon completion of this research, a curriculum alignment will be completed where the results of this study may be applied to existing and future curriculum.
7. This study will not include a revision of the program's existing assessment procedures or methods. Upon conclusion of the research, the Business Technology Department at CVTC will make modifications to its assessment of programs.

#### Assumptions of the Study

1. This study assumes that administrative professionals will answer truthfully and honestly about competencies they perform on the job. They will thoroughly consider their job performance and skills they are required to utilize.

2. This study assumes that administrative professionals will answer truthfully and honestly in terms of present and new technology impacting them on the job. They will respond accurately about utilizing current technology and consider the potential benefits of new technology influencing their job performance.
3. This study assumes that administrative professionals are willing to try new technologies and adapt to a variety of roles. When an employer adopts a new technology or changes or develops a process, administrative professionals modify their job responsibilities.
4. This study assumes that administrative professionals have access to equipment and opportunities to learn about new technology. Administrative professionals are required to utilize technology in their jobs. They seek out educational and training opportunities to learn new technology and new skills and transfer learning to their job performance.
5. This study assumes that companies have the financial resources to obtain and maintain the technologies discussed in this report. Businesses purchase new technology and update technology as necessary for optimal organizational performance.
6. This study assumes that, if companies do not have current access to the technologies, they are committed to continuous improvement and will attempt to gain access if the technology can benefit the organization and assist the administrative professional in his/her job functions. Organizations may not

have the financial ability to purchase new technology when it is first introduced but commits to budgeting for equipment additions that will improve business operations.

### Definition of Terms

1. Administrative Assistant program – two-year degree program at Chippewa Valley Technical College, housed in the Business Technology Department.
2. Administrative professional – acceptable job title for secretaries as recommended by the International Association of Administrative Professionals (On-line).
3. Administrative responsibilities – tasks routinely performed by administrative professionals within an organization.
4. Competencies – major skills, knowledge, attitudes or abilities needed to perform a task effectively and efficiently (WIDS).
5. Core abilities – the broadest outcomes, skills, or purposes that are addressed throughout an entire course or program (WIDS).
6. DACUM – stands for Developing A Curriculum, a quick method of conducting a job analysis, it uses the expertise of professionals and supervisors to develop competencies for an occupation (Lee, n.d.).
7. International Association for Administrative Professionals (IAAP) – the world’s largest association for administrative support staff, with nearly 700 chapters and 40,000 members and affiliates worldwide. In existence for over 50 years, they provide research on office trends, publications, seminars and

conferences, and resources to help administrative professionals enhance their skills and become more effective contributors to their employers (IAAP On-line).

8. Job functions – assignments carried out by employees during the performance of their jobs.
9. Job tasks – assignments carried out by employees that demonstrate achievement of one or more competencies (WIDS).
10. Management responsibilities – tasks normally performed by individuals in management positions within an organization. For example, leadership in meetings, representing the manager or team in meetings, purchase and contract negotiation, and overall management skills (AMA On-line).
11. Skills – learned ability to apply one’s knowledge to perform a task (do something) completely (WIDS).
12. Software – computer application programs designed for a specific purpose such as word processing, spreadsheet, database, accounting, project management, desktop publishing, graphic design, etc.
13. Technology – any device used as a tool in business to carry out job functions or tasks.

### Methodology

This is a quantitative research study. Surveying is the technique that will be used to perform the research. The survey method will be a mail questionnaire. The mail survey

technique was selected because it is relatively inexpensive and allows the researcher to gather information from respondents who may otherwise have been inaccessible.

## Chapter 2

### Review of Literature

The purpose of this research is to identify competencies performed by administrative professionals in the Eau Claire region for the Administrative Assistant program at Chippewa Valley Technical College. The goal is to identify specific skills, job tasks, and functions that are currently being performed and determine the present and future software and technology needs of administrative professionals in the Eau Claire area. The study will identify present job titles and explore the future use of contemporary and progressive job titles for this occupation. It will also look at correlations between performance of job competencies and present and future software and technology needs based on demographics.

In 1998, secretaries (excluding legal and medical) held about 2.7 million jobs in the United States, ranking among the largest occupations in the nation's economy (OOH On-line). Therefore, it is important to understand the direction that the secretarial profession is moving in the 21<sup>st</sup> century so those administrative professionals have the opportunity to update their skills and prepare for the future. The following review of literature will provide some background about the secretarial profession, an understanding of current and future job related trends, responsibilities, skills, technology, gender, and the impact of these areas on the administrative support profession.

#### Background

In 1847, the Merriam-Webster dictionary definition of secretary states, "a person employed by a company to write orders, letters, dispatch public or private papers,

records, and the like....” However, secretaries no longer simply type for the boss. In contrast, the IAAP (On-line) presently defines an administrative professional as a person “...who possesses a mastery of office skills, demonstrates the ability to assume responsibility without direct supervision, exercises initiative and judgment, and makes decisions within the scope of assigned authority.”

No matter what roles secretaries have assumed throughout history or will assume in the capacity of an administrative professional, the goal of his/her activities remains the same. That is, administrative professionals “...assist their employers in the execution of their work and help their companies conduct business in an efficient and professional manner”, as acknowledged in *The Encyclopedia of Careers and Vocational Guidance* (1997). *The Occupational Outlook Handbook* (On-line) states that secretaries are responsible for duties that are essential for an organization to operate efficiently. However, the responsibilities and roles of administrative professionals are changing dramatically. This is evident by research conducted throughout the last decade.

### Current Trends

Downsizing. According to Miller (1997), the decline of the traditional secretarial role can be explained by two factors: downsizing and new technology. Business restructuring or downsizing has impacted the office professional in recent years. It has resulted in a move away from the traditional boss/secretary business relationship to a working environment where the administrative professional is providing support for several managers (McEwen, 1997). According to a PSI benchmarking study in 1997, nearly 37% of administrative professionals surveyed support two or three executives

(Parrish, 1998). Boatman (1998) and Parrish (1998) expressed that administrative professionals have taken on responsibilities that once belonged to middle management before corporate downsizing. Some argue that corporate downsizing has negatively affected the responsibilities of office professionals. On the contrary, McEwen (1997) believes that it has provided office staff with more opportunities for professional growth and has led to a demand for higher skills in some businesses. The result of downsizing can mean challenging jobs for administrative professionals that include greater responsibility, problem solving, and decision-making, and therefore, improved skills (McEwen, 1997).

Program Title. Data for the Wisconsin Technical College System associate degree program titled Secretarial Science was first recorded starting in 1968. The degree was split in January 1981 into two programs, Administrative Assistant – Secretarial and Administrative Assistant – Information Processing, to reflect the diminishing importance of shorthand and the invasion of computers on the profession. The two programs were merged back into one titled Administrative Assistant in July 1991. The WTCS Education Services Manual (2000) states “occupational program titles shall reflect the nature of the content, program of study, and the level of occupational outcomes”. According to the WTCS, the program title must be broad enough to reflect the scope of the program of study and yet specific so that it reflects the anticipated occupational outcomes. Although the occupational outcomes and job roles seem to be transforming for administrative assistants, the associate degree program title throughout technical colleges within the state of Wisconsin has remained unchanged since 1991 (M. Tokheim, personal

communication, July 9, 2001). The ESM (2000) also specifies that degree program titles should “reflect the public’s general understanding of the program”. This research will attempt to comprehend the district’s understanding of the program and the profession by determining present and future job titles, and if justified, recommend a program title change and/or program revision that corresponds with the district’s perception.

Job Titles. Years ago, the job title of secretary brought to mind the image of a female person typing letters, answering telephones, taking shorthand, and doing favors for the boss in the office. The secretaries of the 21<sup>st</sup> century perform more complex tasks on the job with greater responsibility. They continue their education and professional development by taking classes and attending workshops. They become Certified Professional Secretaries (CPS) and belong to professional organizations such as Professional Secretaries International (PSI) now known as the International Association of Administrative Professionals (IAAP). They become certified in Microsoft programs by taking Microsoft Office User Specialist (MOUS) exams. As a result of the secretarial position becoming more of a professional role within the company, individuals no longer hold the title of secretary (Parrish, 1998). According to Parrish as of January 1998, only 18% of the membership of Professional Secretaries International had the title of secretary. Some alternative job titles at the time of the study were office manager, office coordinator, administrative coordinator, administrative support specialist, administrative technician, and project coordinator (Parrish, 1998). The IAAP agrees that new job titles are being created. In addition to those already mentioned, the IAAP recognizes titles such as office administrator, business coordinator, and information manager (IAAP On-line).

OfficeTeam, a firm that specializes in administrative staffing services, identifies yet another title. They define information coordinator as "...facilitating communication among employees and between the company and its customers... becoming the 'nerve center' of remote work groups, managing growing amounts of information..."

(OfficeTeam On-line). According to a Fortune 500 poll, companies indicated that secretaries are now called executive assistants (Net, 1998). OfficeTeam (IAAP On-line) conducted a survey of 150 executives employed by the nation's 1,000 largest companies and discovered that 65% of executives expect the title for administrative assistants will include the word "coordinator" by the year 2005. The IAAP (On-line) describes this trend not only as "the professionalization of the clerical staff" but also, relating to downsizing, the "clericalization of the professional staff". In other words, both job titles and job roles are changing.

### Responsibilities

One new trend of administrative responsibilities is increased Internet use. Administrative professionals use the Internet to research travel arrangements and travel scheduling within the company (IAAP On-line). In addition to scheduling flights and making travel related purchases online, administrative professionals often research topics related to the business. Furthermore, they are getting into web design and updating the company web site (IAAP On-line).

The IAAP (On-line) describes the job of administrative professionals as requiring "skills in management functions and technology such as: project management; integrated computer software applications; organization and scheduling; Internet and intranet

communications and research; document preparation, storage, and retrieval, with emphasis on electronic record keeping; and customer service and public relations.” More and more companies are promoting administrative professionals to management positions because of the experience they have gained and the initiative and leadership qualities they have demonstrated in their jobs (Miller, 1997).

### Skills

In 1994, 14 administrative professionals, led by a representative from CVTC, participated in a DACUM that developed an Administrative Assistant Competency Profile for Chippewa Valley Technical College’s Administrative Assistant degree program. In this profile document, job competencies were organized into 8 core abilities: prepare documents and support information; coordinate meetings and special events; coordinate travel plans; manage office functions; perform office operations; process mail; maintain financial records; and maintain records.

Additionally, the Division of Vocational and Adult Education of the Ohio Department of Education conducted a DACUM in 1995. The study involved representatives from throughout Ohio and was endorsed by PSI. The result was an Administrative and Office Technology Occupational Competency Analysis Profile (OCAP) that identifies competencies needed to enter administrative and office technology occupations. The OCAP clusters competencies into six broad units: communications; office technology; financial functions; records management; support tasks; and professionalism. The OCAP (1995) document also details the competency builders or knowledge, skills, and attitudes, needed to perform each competency.

Another report, the V-TECS Skill Standards study (1996) generated a more comprehensive list of competencies than CVTC's DACUM. Over 500 members of PSI employed in administrative support occupations were surveyed by V-TECS. The results of this survey were categorized into three main areas: occupation-specific knowledge, workplace behaviors, and technical skills. The occupation-specific knowledge is comprised of communication, mathematics, and science. Workplace behaviors consist of work ethics, interpersonal relationships, teamwork, and solving problems/critical thinking. For the purpose of this research, the focus will be on the results classified as technical skills. The technical skills area is divided into 12 subsections including organizing and planning functions; maintaining equipment and supplies; performing financial functions; managing records and files; communications; document production; information distribution; producing desktop publishing documents; using operating systems; and supervising personnel. This research will not utilize two other technical skills grouped as occupation-specific: preparing legal documents and providing medical services.

Document production. Document production is one of the most important responsibilities of individuals working in administrative support occupations. The IAAP (On-line) states that administrative professionals are the final formatters. That is, they make documents look professional by importing graphics, adding graphs and charts, fixing margins, and selecting fonts. The competencies CVTC (1994) categorized as the ability to prepare documents and support information were:

1. Research information for projects.

2. Create documents.
3. Transcribe documents/dictation.
4. Format documents.
5. Proofread documents.
6. Edit documents.
7. Obtain necessary approvals and/or signatures.
8. Bind reports and documents to enhance appearance.
9. Distribute documents.
10. Prepare charts and graphs.
11. Prepare visual aids.
12. Create forms.
13. Complete forms.
14. Prepare stencils and dittos.
15. Enhance documents.
16. Convert electronic documents.
17. Create electronic spreadsheet.
18. Create and maintain databases.

The OCAP (1995) competencies involving the theme of office technology are broadly stated as:

1. Perform computer operating system functions.
2. Perform word processing functions.
3. Perform spreadsheet functions.

4. Perform database functions.
5. Perform computer business graphics functions.
6. Perform desktop publishing functions.
7. Perform transcription machine functions.
8. Apply telecommunications functions.

Competencies related to document production from the V-TECS study (1996) are:

1. Key document from longhand.
2. Key document from machine transcription.
3. Key document from edited rough draft.
4. Key mailing labels and envelopes.
5. Key data to prepare graphs and charts.
6. Key manuscripts.
7. Key correspondence using variable inserts.
8. Key statistical data in documents.
9. Key correspondence.
10. Insert graphic in a document.
11. Design forms.
12. Design tables depicting data.
13. Complete preprinted forms.
14. Compose copy to be keyed.
15. Print data.
16. Paste-up materials to be printed.

17. Make a photocopy of document.
18. Scan data or graphics into a document electronically.
19. Obtain notarization for document.
20. Revise existing documents.
21. Manipulate text or data using software.
22. Search/replace data.
23. Spell check a document using software.
24. Edit a document using the Thesaurus.
25. Correct grammar and punctuation in document.
26. Utilize the Help function.
27. Search data.
28. Proofread document for content, format, and typo errors.
29. Create and edit a database.
30. Determine optimum process for reproduction of printed materials.
31. Merge form letters.
32. Create word processing directory/subdirectory index.
33. Design/produce visuals.
34. Create document using graphic software package.
35. Identify appropriate software for job.
36. Create new documents using word processing software.
37. Transcribe minutes of meetings.
38. Transcribe dictation into mailable documents.

39. Take dictation in shorthand.
40. Develop a macro.
41. Create a template.
42. Take dictation at the keyboard.
43. Create document using spreadsheet software package.

Organizing and planning. The CVTC (1994) competencies that support the ability to coordinate meetings and special events are:

1. Schedule meetings.
2. Reserve meeting rooms and equipment.
3. Prepare and distribute agenda.
4. Distribute written confirmation of meetings.
5. Prepare and distribute meeting materials.
6. Arrange for refreshments.
7. Arrange for meeting supplies.
8. Maintain appointment schedules.
9. Schedule conference calls.
10. Coordinate social-entertainment events.
11. Arrange conference calls.

The competencies associated with coordinating travel plans according to CVTC (1994) include:

1. Identify travel needs.
2. Process travel requests.

3. Prepare itinerary.
4. Obtain approval for itinerary.
5. Confirm itinerary.
6. Verify travel details.
7. Arrange foreign travel details.

Similarly, the V-TECS study combined CVTC's two competency groups of coordinating meetings and coordinating travel plans into a single category labeled organizing and planning functions. Those tasks are described by the results of the V-TECS study (1996) as:

1. Prepare agendas.
2. Compile materials for meetings.
3. Plan physical layout of the office.
4. Plan and organize own work.
5. Log work in and out.
6. Gather information for supervisor.
7. Compile data for company reports.
8. Maintain appointment calendar.
9. Arrange schedules for meetings/appointments electronically.
10. Make travel arrangements.
11. Prepare travel itineraries.
12. Manually schedule calendar for meeting rooms.
13. Plan meetings or conferences.

14. Obtain facilities for meetings and conferences.

15. Obtain audio-visual equipment for meetings.

16. Plan for entertainment, receptions, or dinners.

Office functions. The competencies developed by CVTC (1994) related to managing office functions are:

1. Assign tasks to co-workers.
2. Coordinate workflow.
3. Prioritize tasks.
4. Supervise assigned employees and volunteers.
5. Train assigned employees and volunteers.
6. Provide cross-training for co-workers.
7. Monitor project timelines.
8. Coordinate vacation schedules.
9. Coordinate projects with other departments.
10. Provide periodic oral and written reports.
11. Process complaints.
12. Purchase office supplies.
13. Recommend procedural changes.
14. Interview and hire new employees.
15. Evaluate work performance.

OCAP (1995) listed several competencies under the category of support tasks. The last two functions in this list relate to safety and ergonomics, issues that are not directly addressed as job tasks in the other competency studies:

1. Perform telephone duties.
2. Receive visitors.
3. Perform scheduling functions.
4. Coordinate meeting and function arrangements.
5. Generate minutes.
6. Coordinate domestic and international travel plans.
7. Perform mail functions.
8. Research information.
9. Maintain employee records.
10. Perform copying functions.
11. Maintain office supplies.
12. Maintain office equipment and software.
13. Improve quality and productivity in office.
14. Maintain safe working environment.
15. Assist in providing a productive office environment.

Communications. Consequently, the V-TECS study (1996) divides office management job tasks into two classifications: communications and supervising personnel. Competencies in the area of communication are described as:

1. Explain office procedures.

2. Orient new employees.
3. Make oral presentations.
4. Compose routine correspondence.
5. Dictate correspondence.
6. Compose written directions.
7. Maintain telephone log.
8. Answer incoming calls.
9. Place/return telephone calls.
10. Greet/assist visitors and clients.
11. Handle confidential material.
12. Respond to inquiries.
13. Keep up-to-date with technical developments.
14. Develop liaisons with organizations and the community.
15. Participate in task forces/committees.

The OCAP (1995) competencies for the area of communications are quite broad but they considered an additional competency relating to diversity that was omitted in the other skill lists. The OCAP's communications skills consist of: apply communication skills, compose documents, prepare oral presentations, and communicate with international and culturally diverse audiences.

Supervising personnel. A benchmarking study conducted in 1997 by IAAP (On-line) discovered that one-third of IAAP members supervise others and 45% train others,

especially on computer skills. The job functions relating to supervising personnel according to V-TECS (1996) are:

1. Develop personnel policies.
2. Develop administrative services procedures manual.
3. Update administrative services procedures manual.
4. Conduct employee training.
5. Orient new employee.
6. Explain office procedures.
7. Interview applicant for employment.
8. Select and extend offer of employment.
9. Publicize job opening.
10. Maintain file of job openings.
11. Conduct staff meeting.
12. Review employee attendance records.
13. Maintain employment records.
14. Coordinate employee continuing education programs.
15. Handle employee problem and complaint.
16. Dismiss employee.
17. Develop job description.
18. Establish employee performance standards.
19. Evaluate employee's performance.
20. Establish work priorities for administrative services.

21. Determine workload distributions schedule.
22. Coordinate duties with other employees.
23. Assign work to employee.
24. Develop staffing plan.
25. Prepare vacation schedule.
26. Maintain production records.
27. Maintain a daily log of employee activities.

Office operations. CVTC's (1994) competencies connected with performing office operations are listed as follows:

1. Compile office manual.
2. Compile desk manual.
3. Process telephone calls.
4. Respond to requests for information.
5. Greet guests.
6. Host meetings and social functions.
7. Locate supervisor when necessary.
8. Maintain office supply inventory.
9. Check tickler file.
10. Maintain aesthetic office environment.
11. Review daily activities with supervisors.
12. Maintain resource publications library.
13. Provide input for equipment purchases.

14. Provide notary services.
15. Order supplies.
16. Refer people to other resources.
17. Represent the organization or company.
18. Perform simple maintenance on office equipment.
19. Call for maintenance and repair services.
20. Provide personnel support for supervisor.
21. Record minutes of meetings.
22. Maintain appointment book.
23. Maintain log maintenance.
24. Recommend equipment enhancements.

The V-TECS study combined some of CVTC's office operations roles into other categories.

The competencies CVTC (1994) included under processing mail were:

1. Sort mail.
2. Prioritize incoming mail.
3. Distribute incoming mail.
4. Process outgoing mail.
5. Process specialized mail – bulk, registered, certified, insured.
6. Send/receive electronic mail, cablegrams, telegrams.
7. Send/receive fax mailing list(s).

Information distribution. The V-TECS skills study (1996) classified similar job tasks as information distribution and described them as:

1. Respond to electronic mail messages.
2. Transmit and monitor electronic mail.
3. Respond to voice mail.
4. Retrieve messages from answering machine.
5. Send document via modem.
6. Send document via fax.
7. Receive document via fax/modem.
8. Prepare packages for shipping.
9. Handle specialized mail.
10. Prepare correspondence and document for mailing.
11. Process incoming mail.
12. Process outgoing mail.
13. Process mail through postage machine.
14. Arrange for courier services.
15. Distribute materials.
16. Utilize information database.

Financial functions. Administrative professionals also perform financial functions in some organizations. The competencies CVTC (1994) established for maintaining financial records includes:

1. Process expense reports.

2. Code expenses.
3. Verify orders received.
4. Post financial data.
5. Reconcile office accounts.
6. Process accounts payable.
7. Process accounts receivable.
8. Prepare time reports.
9. Monitor budget.
10. Maintain petty cash fund.
11. Calculate time sheet and leave data.
12. Calculate payroll information.
13. Process checks.

The OCAP (1995) study listed four broad competencies of financial functions: apply mathematical skills, perform accounting functions, perform payroll functions, and perform banking functions.

Similarly, the V-TECS skills study (1996) revealed financial functions such as:

1. Process payroll.
2. Prepare tax-withholding reports.
3. Process accounts payable invoice.
4. Approve bills for payment.
5. Complete vouchers for payment.
6. Determine budgetary requirements.

7. Prepare budget for administrative services.
8. Maintain petty cash fund.
9. Keep record of offices expenses.
10. Reconcile cash count and receipts.
11. Prepare bank deposits.
12. Reconcile bank statements.
13. Make journal entries.
14. Reconcile journal.
15. Complete purchase requisitions.
16. Prepare employer's travel voucher.
17. Accept payment on account.

Managing records and files. The competencies recognized by CVTC (1994) in the category of maintaining records consist of:

1. Create filing system.
2. Identify filing subsystems.
3. Comply with regulations and company policies regarding record retention/confidentiality.
4. Duplicate documents.
5. Code documents.
6. File documents.
7. Follow guidelines for confidentiality and security.
8. Retrieve documents as required.

9. Prepare documents for permanent storage.
10. Track files in use.
11. Purge files.
12. Update files.
13. Destroy files.
14. Restore files.
15. Maintain and update inventories of fixed assets.
16. Maintain personnel file.

The OCAP (1995) research unveiled only two main competencies for records management – file/retrieve documents and integrated media and manage filing system. It was interesting to note that even the competency builders supporting those two skills were not anywhere near as comprehensive as CVTC's or the V-TECS records management skill lists. One explanation for this may be that some organizations have individuals employed specifically in records management positions and therefore, administrative professionals are not performing these duties.

Managing records and files is also another core ability that V-TECS (1996) found to be performed by administrative professionals. Their list consists of the following competencies:

1. Maintain alphabetic filing system.
2. Maintain subject-filing system.
3. Maintain numeric filing system.
4. Maintain electronic files.

5. Maintain chronological file.
6. Maintain classified or confidential files.
7. Maintain file of addresses and telephone numbers.
8. Maintain magnetic media file.
9. Develop records management system and guidelines.
10. Maintain supervisor's photographs and biographical data.
11. Process records for destruction or disposition.
12. Maintain disk library.
13. Use database for records.
14. Retrieve information from files.
15. Search for lost materials in file.
16. Maintaining clippings file.
17. Maintain tickler file.
18. Maintain historical records.
19. Maintain reference library.
20. File materials.
21. Log incoming records.
22. Transfer files manually/electronically.

Maintaining equipment and supplies. V-TECS (1996) unveiled competencies of maintaining equipment and supplies that are similar to some of CVTC's tasks listed under performance of office operations. Administrative professionals have more purchasing power within organizations than they did a decade ago. Parrish (1998) notes

that office professionals no longer just purchase pencils and staples. The results of the 1997 IAAP benchmarking study indicate that 78% of administrative professionals recommend or make major purchasing decisions within their company (Parrish, 1998). That study also revealed that 20% of administrative professionals are authorized to spend between \$5,000 and \$25,000 of the corporate budget (Parrish, 1998).

In addition to making equipment related decisions, one study showed that a majority of office professionals provide informal office technology training on that equipment to subordinates, peers, and superiors even though it is not often part of their job descriptions (Sormunen et al., 1999). The V-TECS study (1996) depicts maintaining equipment and supplies functions as:

1. Maintain inventory of software.
2. Prepare cost justification for software.
3. Assist co-workers with software problems.
4. Maintain software licenses.
5. Train others on equipment.
6. Assist co-workers with hardware problems.
7. Maintain inventory of office equipment and furniture.
8. Maintain equipment leases.
9. Schedule maintenance of office equipment.
10. Prepare cost justification for purchase of office equipment and furniture.
11. Evaluate/recommend equipment for purchase.
12. Receive office equipment and supplies.

13. Store office equipment and supplies.
14. Supervise installation of office equipment.
15. Order supplies.
16. Maintain inventory of supplies.
17. Maintain inventory of forms.
18. Perform regular maintenance of equipment.

Desktop publishing. In addition, the IAAP (On-line) believes that administrative professionals need fundamental skills in graphic design. The necessary competencies related to producing desktop publishing documents include:

1. Design a desktop published document.
2. Prepare a paste-up for a multi-page booklet.
3. Create bulletins, flyers and announcements.
4. Create business cards.
5. Create multi-page document.
6. Create multi-column document.
7. Create brochures.
8. Create charts and graphs.
9. Create flow charts.
10. Insert scanned graphics/photos into existing page layout.
11. Import text, charts, tables and other graphics from other software programs into a desktop-published document.
12. Create and use templates.

13. Create, edit and save style sheets.
14. Create a design/publication using clip art, boxes, shading, lines, and illustrations created with drawing and paint tools.
15. Create a newsletter using headings, wrap-arounds and graphics.

Using operating systems. Being able to use operating systems and manage a personal computer is another core ability for administrative professionals. The IAAP (On-line) views administrative professionals as the primary application users, who often train managers on software. These individuals also troubleshoot computer hardware and software problems and are the first people that distressed managers will call on for computer help. It includes competencies such as (V-TECS, 1996):

1. Boot, access, and exit operating system.
2. Execute basic PC commands.
3. Create directory/subdirectory.
4. Optimize hard disk space.
5. Configure operating system.
6. Analyze memory configurations.
7. Assure backup of system.
8. Restore from backup.
9. Install software.
10. Delete software.
11. Copy one diskette to another.
12. Convert document from one system to another.

Professionalism. OfficeTeam (2001) cited as a result of its study, “The Office of the Future: 2005”, that computer proficiency alone will not guarantee career success. The workplace requires skills such as problem-solving abilities, ethics, open-mindedness, persuasiveness, leadership, and educational interests. Moreover, the word “secretary” itself is derived from the root word “secret”. In other words, the concept of confidentiality has been part of the administrative professional’s code of ethics since the beginning of the profession (DeMars, 2001). The OCAP study (1995) contained an additional grouping encompassing such qualities and described it as professionalism. These tasks are not directly addressed as job functions in the other competency studies. The professionalism competencies according to OCAP include:

1. Demonstrate office ethics.
2. Demonstrate behaviors appropriate to business or industry.
3. Assist in achieving goals set by employing organization.
4. Participate in professional development activities.

### Supervisor’s Perspective

A survey conducted by the American Management Association (AMA) analyzed skills and competencies according to present and future importance for office professionals from the perspective of 2,039 administrative professionals and over 532 managers who supervise office professionals on a daily basis. The competencies were grouped into three categories of job skills, life skills, and team skills. The 20 job skills listed on the AMA survey questionnaire were generically stated as compared to the competency studies previously mentioned. AMA job skills included such competencies

as multimedia usage, computer literacy, travel management, project management, report and document design, research ability, among others. The result of the study was that secretaries and managers generally agree on the importance of current and future competencies listed in the questionnaire. Secretaries and managers placed the same items in the top 15 of the 41 skills included in the questionnaire (AMA On-line).

Differences between the two groups emerged in the competencies related to managerial skills and responsibilities (AMA On-line). Overall, office professionals view management skills as more important to their jobs than managers do. The AMA (On-line) reported as a result of the study that where empowerment is practiced, office professionals take on managerial roles. Secretaries in such environments are seen as working with others to achieve organizational goals and objectives instead of working for the manager.

### Technology

Technology has certainly changed the way many office tasks are being performed (McEwen, 1997). One positive impact of technology is in the way that it has simplified many routine secretarial tasks (Fellin, 1997). The Occupational Outlook Handbook (On-line) affirms that the combination of office automation and organizational restructuring have led secretaries to assume new responsibilities. In addition to corporate downsizing, Miller (1997) also attributes the decline of the traditional secretarial role to the adoption of new technology. In fact, workplace technology has also enabled secretaries to shed some traditional roles and emerge as information managers and graphic designers (Fellin, 1997). New and emerging technological developments also offer administrative assistants

opportunities to learn new skills and participate in professional development activities. However, administrative professionals are often expected to learn new skills and adjust to new technologies with little or no structured training (McEwen, 1997). In some businesses, office workers are left to teach themselves about new technology. Since administrative professionals are often some of the first employees within an organization to adopt and use new technology, they become “mission critical” until the remainder of the company’s workforce is trained (Miller, 1997). In fact, it is extremely common for individuals who are thoroughly knowledgeable in various software applications to become on the spot or accidental trainers (Blumfield, 1997). Therefore, administrative professionals must be flexible, be able to adapt, be self-directed, and have the ability to learn new skills and technologies (McEwen, 1997). Due to technological changes, there is a great demand for secretaries who are adaptable and versatile (OOH On-line).

### Future Trends

Technology. Basically, wireless and digital products are the trend for the near future – digital copiers, digital cameras, and digital cell phones. It is expected that other technologies such as mouselike computer pens and palmtop computers will become standard business tools (Ey, 1998). Voice recognition software like Dragon Naturally Speaking will be greatly improved in the 21<sup>st</sup> century (Ey, 1998). Ey (1998) also advises to watch for emerging companies and specialization in the area of business decision software, which has the capability of answering what-if questions and predicting the outcome of various business scenarios.

In “The Office of the Future: 2005”, OfficeTeam (On-line) surveyed 1,400 chief information officers nationwide and conducted interviews with technology experts to comprise a listing of the top technological trends relating to administrative professionals and the future workplace. Similarly, the most prevalent technologies forecast for the year 2005, were wireless communications (39%), voice-activated technology (39%), and personal digital assistants (16%). A complete list of technologies that were identified included portable personal computers, smart phones and wireless communicators, faster Internet access, digital input devices, improved multifunction peripherals (MFPs), smarter virtual business meetings, flat monitors and electronic whiteboards. OfficeTeam (On-line) then described each of the technologies. Smart phones combine the best features of cellular phones and handheld computers to store thousands of phone numbers, retrieve voicemail and email, access the Internet, interface with a computer, transfer email to an audio version. Digital subscriber lines (DSL) will make Internet access faster and easier. The survey also reveals that digital input devices that convert handwriting or voice to digital text will become more prevalent by 2005. MFPs, devices that now combine high-speed laser printing, scanning, faxing, and copying functions, will soon have the capability to capture images from a VCR, camcorder, or digital camera. Meeting software will become commonplace for conducting conferences and meetings. Furthermore, electronic whiteboards will be used to upload handwritten notes to a computer.

Job Responsibilities. In the “Office of the Future: 2005” study, 150 executives with the nation’s 1,000 largest companies reported some specific trends for the future of

the occupation of administrative assistants. By 2005, 56% of executives believe that administrative assistants will impact the selection and implementation of new technologies. Sixty-five percent of executives say that administrative professionals will be more relied upon for project management expertise by 2005 (OfficeTeam On-line). Respondents indicate that entry-level administrative professionals will also assume more responsibility in the areas of Internet research (81%), desktop publishing (71%), computer training (55%), and web page development (31%). Because administrative professionals have expert computer skills in numerous software applications, they often inadvertently become trainers within an organization (Sormunen et al., 1999).

Gender. When considering the intensification of technology usage and the variety and complexity of software programs being utilized by administrative professionals, it should not be difficult to attract more males to the profession. Research has proven that job responsibilities are transforming from traditional secretarial roles into challenging, high level job functions. The gender gap for the occupation is narrowing. In heavily-populated, urban areas like San Francisco, male administrative assistants are “not uncommon – but still not typical” (Hendrickson, 1998). They comprise about 20% of those employed in the occupation (Hendrickson, 1998). In some industries, for example the finance community, male administrative assistants are perceived to be using the position as a stepping-stone – to get their foot in the door and later make a career move into a higher position (Hendrickson, 1998). It may take some time before the gender shift makes its way into rural areas of the country and the administrative profession acknowledges complete gender equity.

### Competency Study Rationale

Effective competencies help instructors determine what content to teach, how to select teaching and learning strategies, and dictate what and when to measure to test or assess learner achievement (WIDS). In other words, they serve as a blueprint for program and course construction. According to the Educational Services Manual of the Wisconsin Technical College System Board (2000), the official document for standards and procedures in developing and maintaining programs and program curricula, curricula of associate degree programs should be designed to reflect statewide competency requirements for jobs. A needs survey, in the form of a mail or telephone questionnaire, is a requirement of the WTCS for the completion of a needs assessment plan when proposing new programs (ESM, 2000). The WTCS program approval process is directly tied to the labor market need. Even though the objective of this research is not to propose a new program, a needs/competency survey will be beneficial to accurately determine present and future competencies of administrative professionals as well as software and technology needs. Furthermore, a survey of competencies will support how the data from this research will be utilized. It will encourage the implementation of program revisions, aid in efforts to assess student learning, defend budget requests for additional instructional and learning technologies as well as instructional staff development, and advocate for a program revision and/or title change.

### Summary

When reviewing the literature, the skills needed, and tasks performed by administrative professionals, it is evident that the value of administrative professionals in

business is increasing along with his or her scope of responsibility, importance within the organization, and need to be highly skilled and computer literate (Miller, 1997).

Administrative professionals today are required to demonstrate a more broad range of skills beyond those traditionally thought of as part of a secretary's job (Miller, 1997).

They are frequently involved in the organization's accounting functions, research activities, and project management tasks as well as supervision of employees including hiring and training. They are given autonomy in performing their job and are allowed to make important company decisions. Unlike traditional secretarial tools of a typewriter and a telephone, administrative professionals are now required to effectively use a variety of new and emerging technologies to enhance productivity and performance. The challenge of expanding job responsibilities and increased development and use of technology is expected to continue well into the future (OOH On-line). Administrative professionals will continue to play a key role in most organizations because of their technical and personal skills. Therefore, it is necessary to study the current competencies being performed and research the expected future performance of innovative job tasks.

## Chapter 3

### Methodology

The quantitative methodology used to gather data about job competencies of administrative professionals was a survey. Quantitative data gathering is one useful strategy for performing a task analysis and identifying job competencies for occupations. This method was selected because Chippewa Valley Technical College, in the 1994 competency study conducted for the Administrative Assistant program, utilized a DACUM technique to develop a skill profile for this occupation. Since this study is outdated, the researcher can benefit by expanding upon the aspects that the original study and subsequent studies conducted elsewhere, as discussed in the review of literature, did not emphasize (Kopac, 1991).

Some advantages of a mail surveys are that they are inexpensive to administer and respondents can answer at their own convenience. Furthermore, the confidentiality of respondents can be protected (Kopac, 1991).

#### Survey Development

The survey was constructed based on the research objectives as illustrated in Table 1 on the following page.

Table 1

Research Objectives Addressed in Survey

Research Objective	Survey Item or Page
1. Identify administrative assistant competencies.	Page 2 through 7
2. Determine the present and future software and technology needs.	Page 2 through 7
3. Identify present and future job titles of administrative professionals.	Items 1 and 2
4. Determine if there is a difference in administrative assistant competencies and present and future software and technology needs of administrative professionals based on demographics.	Items 3 through 6

The questionnaire was designed to maintain respondent anonymity so that it would solicit the authentic opinions, attitudes, and beliefs of the participants. The first few open-ended questions were directed at current job titling and the future trend for job titles of administrative professionals. Additional introductory questions were designed to solicit demographic data about the organization and type of business employing the administrative professional. The industry classifications of goods producing, service, construction, manufacturing, transportation, wholesale trade, retail trade, finance/insurance/real estate, and government were emulated from divisions listed in the West Central Wisconsin Workforce Development Area Labor Market Review (2001).

The job competency section was compiled using the results discovered in the review of literature. Most of the competencies identified in CVTC's Competency Profile (1994) were incorporated in the V-TECS (1996) task listing in some form. Therefore, the entire listing of competencies from the V-TECS (1996) study was used because of its completeness and thorough organization of tasks. The category of professionalism from the OCAP study (1995) was added to the survey because these competencies were absent in the other two lists. The competency relating "communication with international and culturally diverse audiences" from the communication section of the OCAP study (1995) was also included. Several additional competencies were developed by the researcher to integrate future technology trends and job responsibilities revealed in the review of literature.

### Survey Design

The job competencies were presented according to core ability category. The response alternatives, a six-point scale according to frequency of task performance or anticipated future performance, for each competency are presented above a series of rows of numbers. The consistency in the direction of the scale throughout the survey helps avoid respondents' circling the incorrect choice (Dillman, 2000). The even number of responses within the scale eliminates the tendency for the respondents to choose a moderate rating (Kopac, 1991).

Short lines of text were used for the competency descriptions so the respondents would not skip or miss crucial words when reading. Shorter lines are easier to comprehend because, with longer lines, the reader's eye has to stay on the correct line

while moving across the entire width of the page (Dillman, 2000). However, the competency descriptions are printed some distance from the numerical answers. Thus, ellipses were also used after each competency description to guide the respondent's visual trail horizontally to the correct line of numbers.

### Pilot Study

Occasionally, a pilot study that emulates the procedures proposed for the main study is necessary to validate survey elements and design and to establish face and content validity (Dillman, 2000). For this study, it was important to investigate if there was a high correlation between any of the proposed competencies and actual job performance of responsibilities by administrative professionals. It was also of interest to validate the supplementary competencies uncovered by the literature review and to confirm the completeness of the survey instrument.

A pilot test of the survey instrument was conducted using the Business Technology Department Advisory Committee. Refer to Appendix A for a listing of Advisory Committee members. The survey shown in Appendix B was mailed to committee members in March 2001 along with the agenda packet for an upcoming meeting. Committee members returned the completed surveys to the researcher via return-address envelope. The pilot data was gathered and analyzed. The results were summarized and reported to the advisory committee members. Members were asked to select the competencies that they believe are so commonly performed by administrative professionals that those competencies could be eliminated from the survey instrument in order to lighten the response burden for participants. Mike Tokheim, Business Education

Consultant of the Wisconsin Technical College System Board, also reviewed the pilot survey and submitted comments.

In the midst of considerable changes affecting administrative professionals, including significant technological development and organizational restructuring, it seems that many of the core responsibilities of administrative assistants have remained the same (OOH On-line). This hypothesis was confirmed by the responses in the pilot test. However, the decision was made to retain all of the competency categories in order to offer respondents a comprehensive job task listing. A few competencies were reworded for clarification as a result of the pilot study responses. The aesthetic appearance of the survey was also revised based on feedback from the pretest participants.

### Selection of Subjects

Subjects within the Eau Claire region were selected to participate. One section of the survey population included attendees of the Eau Claire area IAAP Office Personnel Seminar from the conference held during Administrative Professional's Week in April 2000. The seminar was presented annually by the Chippewa Valley Chapter of the International Association of Administrative Professionals and Chippewa Valley Technical College. The sample size of the population was 172. The IAAP seminar class roster (2000) was obtained from Chippewa Valley Technical College's administrative assistant for the marketing team. The alphabetical listing contained the names and home addresses of the seminar attendees.

The other section of the survey population was chosen because of their affiliation with the Administrative Professional's Luncheon held at the University of Wisconsin-Stout annually during Administrative Professional's Week in April. The original sample size of this population was 153. The mailing listing for the luncheon was obtained from the UW-Stout Affirmative Action office. Seven addresses were deleted from this list because they referred to a legal or medical office, categories of administrative professionals that are not included in this study. Other business addresses were omitted because they were generically addressed to "administrative professional" and they duplicated another label addressed to a specific individual at the same business location. The addresses did not appear to be in any particular order. The revised sample size of this population is 136. Ninety of the addresses were generically directed to "administrative professionals" at each business. Forty-six of the addresses were directed to a specific individual within the business organization. The survey letters that were mailed to this section of the population addressed concerns about duplication of receipt and incorrect recipients.

### Implementation

Some elements that have been shown to significantly improve response to mail surveys are respondent-friendly questionnaires, multiple contacts by mail, return envelopes, personalization of correspondence, and token prepaid financial incentives (Dillman, 2000). Research has shown that a prenotice will improve the response rates to mail surveys (Dillman, 2000). Therefore, using Dillman's (2000) content guidelines, a prenotice postcard was developed. The first paragraph described what was going to

happen – that a survey would be arriving in the mail within a few days. The second paragraph explained what the survey was about and its usefulness. The final line offered the recipients an advanced thank you. The postcards were duplicated on yellow, cardstock paper and were cut to a 3-½ inch by 5-inch card size in order to adhere to United States postal regulations. The researcher personally signed each postcard using a pressed, blue ballpoint pen so the recipients could tell that the signature was real (Dillman, 2000). The CVTC logo and address was used for the return address on the mailing label side of the postcards. The postcards were mailed to respondents and timed so that the prenotice arrived within a few days to a week ahead of the actual survey. Refer to Appendix C for a sample of the prenotice postcard that was mailed to recipients.

Cover letters were constructed based on Dillman's (2000) guidelines. The first paragraph stated the request for the respondent's help. The second paragraph described why the addressees were selected to receive the survey. The third paragraph detailed the usefulness of the survey and the research being conducted. The fourth paragraph explained confidentiality and provided information that should reduce some of the limitations related to the population and listings of subjects. Subsequent paragraphs indicated the token of appreciation if included, the survey due date, a thank you, and willingness to answer questions about the study. All of the cover letters were printed on CVTC letterhead and were again personalized with the signature of the researcher in contrasting blue ink.

The cover letters accompanying the mailing to the first population were personalized via merge document and included individual names in the salutation of the

letter (Appendix D). A separate cover letter accompanied the surveys for the individuals who received the token phone cards (Appendix E). A separate cover letter was also created for the UW-Stout population because of the demographic nature of the addresses in the list. The cover letters accompanying the mailing to the second population were personalized via merge document and included individual names in the salutation of the letter whenever possible or were generically addressed to “administrative professional” (Appendix F). A separate cover letter accompanied the surveys for the individuals who received the token phone cards for this population as well (Appendix G). All of the cover letters were dated April 5, 2001 and were mailed along with the questionnaires on April 6, 2001.

Business reply envelopes were mailed along with the survey as a motivator for respondents to return the questionnaire (Kopac, 1991). For additional motivation to respond, Dillman (2000) maintains that smaller token incentives included with the request to complete the survey have been significantly more effective than promised incentives or larger tokens of appreciation sent to respondents after they have returned their questionnaires. Consequently, the researcher designed and developed token phone cards as a promotional item for the Business Technology Department and included 102; 10-minute, prepaid phone cards with the surveys in an attempt to improve the response rate. The phone cards were inserted into every third survey mailed within each population listing. Refer to Appendix H for a sample of the phone card design.

The questionnaires were duplicated, back-to-back on 8 ½ inch by 11 inch paper that was then folded booklet style and stapled in the center fold. The survey instrument

was reproduced on ivory paper, which, although subjective, research has proven light colors to be more effective than dark-colored questionnaires (Kopac, 1991). All surveys were given a unique numerical marking for identification upon return. The surveys that were mailed along with token phone cards were marked with an additional identifying symbol. The UW-Stout surveys that were personalized with the name of an individual in the cover letter and on the mailing label were marked with another unique identifying symbol. The mailing detail of the cover letters, surveys, and tokens is summarized in Table 2 on the following page.

Table 2

Survey Mailing Detail

Survey Population	Number	Tokens	Mailed To	Cover Letter
Office Personnel Seminar 2000 Attendees	172	57	Home Address	Personalized
UW-Stout Administrative Professional Mailing	46	16	Business Address	Personalized
UW-Stout Administrative Professional Mailing	90	29	Business Address	Not Personalized
Total	308	102		

The survey was mailed during the first week in April so as to avoid the timing of spring break holidays in the Eau Claire regional area (Kopac, 1991). The participants

were contacted by United States mail. Subjects were allowed approximately seven business days to complete the survey and return it to the researcher. The deadline for response was April 18 so as not to compete with the April 16 individual tax return deadline and to allow recipients a few days before and a few days after the Easter holiday to complete and return the questionnaires. The final questionnaire can be found in Appendix I.

In order to monitor non-respondents, returned surveys were recorded in a spreadsheet application program according to the number and marking assigned to each recipient. A thank you postcard was sent approximately one week after the initial questionnaire mailing to express appreciation for participation to those who responded and to encourage completion of the surveys that had not yet been returned (Dillman, 2000). According to Dillman (2000), postcard follow-ups often “jog memories and rearrange priorities”. By the use of this third contact with participants, non-respondents are prompted to complete the survey rather than give precedence to other tasks.

The format and wording of the third contact is significant. The first paragraph stated that a survey was sent to the respondent and restated the purpose for the study. Following this wording and format is important because this postcard may actually be the first time that some participants are made aware that a survey was sent to them. It is critical to communicate the meaning for which the postcard was designed in the second paragraph. The intended message was to thank those individuals who have already returned their surveys and to request that those who have not returned their questionnaires do so “today”. The time reference was consistent with the importance

conveyed. Dillman (2000) suggests that the follow-up postcard mailing be sent to all participants, whether they have responded or not, because it would be time-consuming to sort returns. A summary sentence, which corresponds to a description in the initial cover letter, was included to amplify the value of each participant to the success of the study (Dillman, 2000). The final paragraph was directed to those who, for one reason or another, did not receive the original questionnaire and those who have discarded it. The follow-up postcards were duplicated on bright orange, cardstock paper so as to contrast the prenotice postcards (Dillman, 2000). They were cut to a 3-½ inch by 5-inch card size in order to adhere to United States postal regulations. Once again, the CVTC logo and address were used for the return address and the researcher personally signed each postcard using a pressed, blue ballpoint pen. Refer to Appendix J for a sample of the follow-up postcard that was mailed to recipients.

In order to increase participation and offset some of the limitations of the mailing population, the researcher attended the UW-Stout administrative professional's luncheon in Menomonie, Wisconsin on Wednesday, April 25, 2001. Fifty-four surveys were randomly distributed to attendees as they entered the luncheon. These surveys were duplicated on gray paper to distinguish them from the initial survey mailing. They were also given a unique identifying number for tallying purposes. No phone card tokens were distributed during this procedure.

The researcher also attended the IAAP Office Personnel Seminar in Eau Claire, Wisconsin on Friday, April 27, 2001. The IAAP seminar class roster (2001) was obtained from CVTC. Questionnaires with personalized cover letters were provided to 126

administrative professionals upon registration at the seminar. Six administrative professionals attending whose names were not included in the registration list for continuing education credit also picked up a survey. These surveys were duplicated on green paper to distinguish them from the initial survey mailing and the UW-Stout luncheon responses. They were also given a unique identifying number for tallying purposes. Of the listing containing 187 registrations for the seminar, 25 names had been removed because they attended the seminar in April 2000 and had already returned the survey from the initial mailing. Of the 187 individual registrations for the 2001 seminar, 31 were individuals who had received the survey during the initial mailing but had not yet responded. A replacement questionnaire was given to nonrespondents from the Eau Claire area Office Personnel Seminar 2000 list that attended the seminar again on April 27, 2001. The replacement questionnaire was provided along with a personalized letter that contained statements about their survey not being returned, others have responded, the usefulness of each response, eligibility to respond, and confidentiality (Dillman, 2000). A copy of the letter is located in Appendix K. These questionnaires were duplicated on ivory paper to indicate that these individuals were part of the initial mailing population. They were identified with the same number as the initial mailing but an "R" was placed before the number. For example, if individual number "4" did not respond to the initial mailing and he/she was registered to attend the OPS Seminar again in 2001, that person was provided a replacement survey with a duplicate number "R4" to specify that they are returning a replacement questionnaire. This is also critical to eliminate the possibility of someone filling out two questionnaires or perhaps giving one

to a friend or co-worker to complete (Dillman, 2000). Thirty-six attendees did not pick up surveys during the conference.

### Data Analysis

Returned surveys were documented and counted in a spreadsheet software according to the number and markings assigned which indicated personalization, inclusion of a token incentive, and population. Responses of present and future job titles were manually recorded and tallied. The rest of the survey data was analyzed using SPSS software. A report of frequency counts, percentages, mean, and standard deviation was generated. Cross tabulation reports of frequency counts and percentages between the different survey groups and demographic groups were also printed. Finally, cross tabulation reports of frequency counts and percentages of the collapsed demographic groups were created.

### Limitations

1. A portion of the population of subjects was a cluster sample of prior Eau Claire Office Personnel Seminar attendees.
2. The list of prior Eau Claire seminar attendees was from April 28, 2000 and therefore, was one year old.
3. Because a section of the sample was specifically addressed to administrative professionals at their home addresses and the mailing list was one year old, there was no guarantee that the respondents were still living at the given addresses.

4. One section of the population was from a UW-Stout mailing list. Actual attendance at the UW-Stout luncheon by the respondents in this listing was unknown.
5. Because the UW-Stout section of the population was generically directed to administrative professionals at various business addresses, there was no assurance that any individuals were employed in that capacity within the various organizations.
6. Because the UW-Stout section of the population was generically directed to administrative professionals at various business addresses, there was no guarantee that the survey instrument would be forwarded to an individual in that position within the organization.
7. There was no guarantee that members of a portion of the survey population were still employed by the company listed in the UW-Stout mailing.
8. There was no guarantee that any individual members of the survey population were still employed as administrative professionals.
9. Because of the demographic nature in the manner that the two population listings were compiled; only some duplicate recipients could be eliminated.
10. The lack of industry classification for “education” on the survey instrument might have caused some confusion for respondents working in educational institutions. Their responses may be inconsistently included in either the “service” or “government” categories.
11. The length of the questionnaire may have discouraged some respondents.

12. Some of the respondents may have known or recognized the researcher when the personal follow-ups were conducted at Eau Claire and at UW-Stout.

## Chapter 4

### Results and Discussion

In order to identify competencies performed by administrative professionals and determine present and future software and technology needs and job titles of administrative professionals, a survey was conducted. The survey was mailed to two groups within the Eau Claire region: attendees from the 2000 IAAP Office Personnel Seminar and the mailing list for the UW-Stout Administrative Professionals luncheon. The survey was also personally distributed to two groups: attendees of the 2001 IAAP Office Personnel Seminar and attendees of the UW-Stout Administrative Professionals luncheon in 2001.

#### Survey Returns

A total of nine surveys were returned as incomplete. One respondent indicated the survey was a duplicate, one indicated there were no persons in an administrative professional capacity within the organization, two recipients were not in administrative professional positions, four questionnaires were returned with no responses, and one survey was returned as undeliverable. One completed survey was returned after the response deadline and is not included in the results. Consequently, out of 494 surveys distributed, the total number of completed surveys was 197.

A detailed description of survey returns comparing personalization and token inclusions for the two segments of the survey population is shown in Table 3 on the following page.

Table 3

Survey Return Detail

Survey Population	Number	Token	Personalized Cover Letter	Number Returned	Percent Returned
Office Personnel Seminar 2000	57	Yes	Yes	32	56.1
Attendees Mailing	115	No	Yes	39	33.9
Subtotal	172			71	41.3
UW-Stout Administrative Professional Mailing	16	Yes	Yes	8	50.0
	29	Yes	No	11	37.9
	30	No	Yes	11	36.7
	61	No	No	10	16.4
Subtotal	136			40	29.4
Office Personnel Seminar 2001 Attendees	132	No	Yes	62	47.0
UW-Stout 2001 Administrative Professional Luncheon	54	No	No	24	44.4
Subtotal	186			86	46.2
Total	494			197	39.9

Examining the comparison of the two survey populations, there was a higher rate of return of Eau Claire Office Personnel Seminar attendee surveys. This can be attributed to the personalization of the inside address and salutation in the cover letter and the mailing label on the envelope. Furthermore, due to personal contact with respondents, return rates for the surveys distributed personally are higher than the initial survey mailing return rates. Therefore, personalization efforts seem to have positively increased the response rate in this study.

The inclusion of phone cards as tokens seems to have positively increased the response rate of both sections of the survey population. Overall, 51 out of 102 or 50% of surveys mailed with phone cards were returned. The number of phone card respondents was 32 out of 57 or 56.1% of the Eau Claire seminar mailing token recipients. The number of phone card respondents was 19 out of 45 or 42.2% of the UW-Stout mailing token recipients. Survey responses containing phone cards comprised 51 out of 197 or 25.9% of overall survey returns.

When comparing the return of surveys from the UW-Stout mailing that contained only one of the alternatives, either a phone card token or personalized letter/ mailing label, the response rate was slightly higher for the phone cards with no personalization, 37.9%, as compared to 36.7% with personalization but no token. The inclusion of both a token and personalization in an effort to increase responses yielded the highest returns: 56.1% for the Eau Claire seminar mailing and 50.0% for the UW-Stout conference mailing. Conversely, mailed surveys that utilized a mailing label and cover letter that did not contain any personalization and were not accompanied by a token resulted in poor

returns, only 16.4%. Therefore, the use of phone card tokens and personalization as tools to increase response rates seemed to have worked favorably in this study.

### Present Job Titles

The first survey question addressed the identification of present job titles of administrative professionals in the Eau Claire region. A total of 96 specific job titles were designated by participants, including various classifications of the same job title, such as Secretary I, Secretary II, Admissions Secretary, etc. Similar classifications of the same job category were combined for purposes of analysis. The job titles of administrative professionals are summarized in the Table 4 below.

Table 4

### Job Titles

Position Title	Number	Percent
Other*	105	53.3
Secretary	28	14.2
Program Assistant	27	13.7
Administrative Assistant	18	9.1
Clerk	11	5.6
Receptionist	8	4.1
Total	197	100.0

\*A complete list of job titles for Other is included in Appendix L.

### Preferred Job Titles

The second survey question asked participants what job title they would prefer if they could change the title of their position. A total of 40 respondents indicated they would change their job title to “administrative assistant”. For the most part, the current job title of these respondents contained the word “clerk, secretary, or program”. Sixteen responded that they wanted to include the term “assistant” in their title whether it was “executive assistant”, “office assistant”, or specialized areas such as “personnel assistant” or “financial assistant”. Seven participants wanted the word “manager” to be included in their job title. The title of “office specialist” was desired by three participants and the title of “information systems specialist” was desired by one person. The term “coordinator” was preferred by four participants. Five participants indicated that the title of their position was recently changed and 16 respondents specifically indicated that they did not want to change the title of their job. Over 40% did not respond to the question. There were no specific patterns in the remainder of the preferred job title responses.

### Type of Business

Participants were asked to specify the type of business that best describes the company they are employed by. Respondents were provided a list of choices. Government was chosen by 96 or 48.7% of the respondents. The category of Service was selected by 79 or 40.1% of the respondents. Business categories of Finance/Insurance and Manufacturing each comprised 3.6% of responses. The classifications of Construction, Retail Trade, and Wholesale Trade had 2%, 1.5%, and .5%, respectively. For purposes of

analysis, the latter five business classifications were combined into Other (11.2%). The types of businesses that survey respondents work for are summarized in Table 5 below.

Table 5

Types of Businesses

Type of Business	Number	Percent
Government	96	48.7
Service	79	40.1
Manufacturing	7	3.6
Finance/Insurance	7	3.6
Construction	4	2.0
Retail Trade	3	1.5
Wholesale Trade	1	.5
Total	197	100.0

Number of Employees

Respondents were asked to specify the number of employees within their organization. Most of the participants were from large firms with 51 employees or more, 136 or 69%; medium companies with 21 to 50 employees, 18 or 9.1%; 11 to 20 employees, 17 or 8.6%; and small businesses with 1 to 10 employees, 26 or 13.2%. In order to group respondents for better cross tabulation, the employee categories were

clustered into two groups, 50 or less (31%) and 51 or more (69%). The number of employees within the organization is listed in Table 6 below.

Table 6

Number of Employees

Number of Employees	Number	Percent
1 – 10 employees	26	13.2
11 – 20 employees	17	8.6
21 – 50 employees	18	9.1
51 employees or more	136	69.0
Total	197	100.0

Number of Administrative Professionals

Respondents were asked to specify the number of administrative professionals within their organization. Businesses employing 10 or more administrative professionals comprised 109 or 55.9% of responses; 6 to 9 administrative professionals, 14 or 7.2%; 3 to 5 administrative professionals, 30 or 15.4%; and companies with 1 or 2 administrative professionals, 42 or 21.5%. In order to group respondents for better cross tabulation, the categories were assembled into two groups, 1 – 9 administrative professionals (44.1%) and 10 or more administrative professionals (55.9%). The number of administrative professionals within the organization is listed in Table 7 on the next page.

Table 7

Number of Administrative Professionals

Number of Administrative Professionals	Number	Percent
1 – 2 administrative professionals	42	21.5
3 – 5 administrative professionals	30	15.4
6 – 9 administrative professionals	14	7.2
10 or more administrative professionals	109	55.9
Total	195	100.0

Membership in IAAP

Participants were asked to whether or not they are members of the International Association of Administrative Professionals. Only 12 of 196 or 6.1% of the respondents indicated membership in IAAP. The lack of active participation in the professional organization associated with this occupation was surprising. Perhaps respondents are involved in IAAP activities but are unwilling to pay the membership dues. Possibly, they may be reluctant to make the commitment to attend regular meetings and events that occur outside the typical workday.

Competencies

Administrative professionals in the Eau Claire region were asked to identify job competencies according to frequency of performance (Rarely, Monthly, Weekly, Daily),

nonperformance (Never) or expected future performance (Will Perform Within the Next 1 – 2 Years). For analysis purposes and application of research results, the survey categories of Rarely, Monthly, Weekly, and Daily are considered performance. The percent of respondents who perform each competency are summarized in this chapter.

Additionally, frequency categories were assigned a numerical rating for the purpose of calculating mean and standard deviation. The scale of numerical ratings of performance is as follows: 1 = Never, 2 = Rarely, 3 = Monthly, 4 = Weekly, 5 = Daily. The calculation of mean is the average of the responses in those five frequency categories for each competency. The calculation of standard deviation is an indication of how tightly all of the responses for a specific competency are clustered around the mean. In other words, the higher the standard deviation, the more variance in responses. Therefore, lower standard deviations are more desirable as a sign of validity. The mean and standard deviation for each competency surveyed is presented in this chapter.

The identification of future software and technology needs was available through a response alternative category of Will Perform Within the Next 1 – 2 Years. Responses recorded in that category are listed separately in the result tables.

Competencies were grouped into several distinct core ability categories such as Organizing and Planning Functions, Financial Functions, etc. based on the review of literature. The results will be presented and discussed separately by those classifications.

Organizing and Planning Functions. The results of administrative professionals who perform various organizing and planning functions are summarized in Table 8 on the following pages.

Table 8

Organizing and Planning Functions

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Plan and organize own work	97.9	4.79	.74	.5	96.2	98.9	100.0	96.7	98.5	98.8	97.2
Gather information for supervisor	94.9	3.89	1.19	-	91.1	98.9	90.9	91.5	96.3	95.2	95.4
Compile materials for meetings	88.3	2.92	1.08	.5	88.6	86.3	95.5	85.2	89.6	83.7	91.7
Compile data for company reports	88.1	3.21	1.30	.5	79.5	93.6	95.5	88.3	88.1	90.6	86.9
Prepare agendas	77.8	2.50	1.14	.5	74.0	80.0	81.8	72.1	80.5	71.8	82.2
Plan meetings or conferences	70.3	2.29	1.18	.5	70.5	69.5	72.7	63.3	73.3	63.5	75.0
Obtain facilities for meetings and conferences	67.3	2.18	1.13	.5	63.3	72.9	57.1	65.6	68.1	60.5	73.1
Maintain electronic calendars	65.4	2.81	1.69	1.0	66.7	63.4	70.0	55.9	69.7	59.3	70.4

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Log work in and out	64.4	2.96	1.80	-	57.0	67.7	77.3	53.3	69.4	60.0	67.3
Make travel arrangements	63.8	2.03	1.06	-	56.4	66.7	77.3	63.9	63.7	64.0	63.9
Obtain audio-visual equipment for meetings	61.5	1.99	1.06	.5	57.0	69.5	42.9	62.3	61.2	57.0	64.5
Plan physical layout of the office	60.5	1.77	.85	6.6	52.9	64.4	70.0	57.1	62.0	56.8	63.8
Maintain calendar for meeting rooms	55.3	2.38	1.54	-	57.0	55.2	50.0	52.5	56.6	57.0	54.1
Plan for entertainment, receptions, or dinners	50.3	1.73	.93	1.0	43.4	53.1	61.9	60.0	45.9	54.8	46.7
Prepare travel itineraries	49.2	1.75	.98	-	40.5	52.6	66.7	45.0	51.1	47.1	50.9

Planning and organizing own work was the competency performed by respondents the most (97.9%) in this category, followed by gathering information for supervisor (94.9%) and compiling materials for meetings (88.3%). These competencies also have high means that correspond with the high performance ratings and fairly low standard deviations indicating little variation in responses. The competencies performed the least were planning for entertainment, receptions or dinners (50.3%) and preparing travel itineraries (49.2%). As expected, these two competencies had the lowest means (1.73 and 1.75 respectively) and low standard deviations (.93 and .98 respectively).

Predominantly, the performance of organizing and planning functions by individual demographic categories of type of business, number of employees, and number of administrative professionals within the organization is consistent with the performance of these competencies as rated by respondents as a whole. However, there were noticeable differences in three competencies based on the type of business. For the competency of making travel arrangements, 77.3% performance was reported by Other, 66.7% by Government, and 56.4% by Service. Preparing travel itineraries is performed by 66.7% of Other, 52.6% of Government, and 40.5% of Service. Similarly, planning for entertainment, receptions, or dinners is performed by 61.9% of Other, 53.1% of Government, and 43.4% of Service. Finally, those working in larger organizations (69.7%) and with more administrative professionals (70.4%) maintain electronic calendars more than smaller organizations (55.9%) with fewer administrative professionals (59.3%).

A total of 13 out of 197 respondents or 6.6% predicted to plan the physical layout of the office within the next couple of years. Two respondents or 1.0% expect to maintain electronic calendars and plan for entertainment, receptions, or dinners. Seven other competencies had one respondent or .5% predicting future performance.

Maintaining Equipment and Supplies. The results of administrative professionals who perform maintenance of equipment and supplies are shown in Table 9 on the next pages. The highest performance ratings in this grouping were for ordering supplies (87.0%) and receiving office equipment and supplies (86.3%). However, there were some slight irregularities in responses with standard deviations of 1.23 and 1.18, respectively. The tasks performed most infrequently were maintaining equipment leases (34.9%), preparing cost justifications for software (31.3%), and maintaining software licenses (23.1%). The means were consistently low at 1.51, 1.39, and 1.38, respectively, and the responses were tightly clustered around the means with standard deviations of .85, .66, and .89, respectively.

The performance of maintaining equipment leases varies according to the type of business. Administrative professionals in Other businesses responded with a performance rating of 40.9%, Government 38.5%, and Service 29.1%. The type of business also had an effect on the preparation of cost justifications for purchases of office equipment. For Government, over 50% of administrative professionals perform cost justifications while in Service and Other businesses; approximately 35% perform such duties.

Table 9

Maintaining Equipment and Supplies

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Order supplies	87.0	3.07	1.23	-	83.5	91.3	81.8	86.2	87.4	88.0	86.1
Receive office equipment and supplies	86.3	2.94	1.18	1.5	87.2	85.7	85.7	81.0	88.6	82.9	88.7
Store office equipment and supplies	81.3	2.97	1.35	.5	84.6	76.3	90.9	81.7	81.2	82.4	80.2
Evaluate/recommend equipment for purchase	78.6	2.09	.86	3.0	76.9	79.8	80.0	82.5	76.9	81.5	76.0
Maintain inventory of supplies	75.6	2.92	1.41	-	73.4	77.2	77.3	77.6	74.8	78.3	73.1
Train others on equipment	75.5	2.48	1.29	.5	75.9	75.0	76.2	78.3	74.2	77.1	74.8
Maintain inventory of forms	73.4	2.78	1.39	-	69.6	75.8	77.3	78.0	71.4	75.0	71.7

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Assist co-workers with software problems	73.1	2.74	1.46	-	71.8	75.3	68.2	75.0	72.2	74.1	73.6
Supervise installation of office equipment	60.0	1.95	1.05	2.0	55.7	62.6	65.0	67.8	56.5	62.7	57.1
Assist co-workers with hardware problems	57.7	2.06	1.21	-	59.5	54.8	63.6	63.3	55.2	63.1	54.6
Maintain inventory of office equipment and furniture	57.1	2.07	1.23	1.0	58.4	57.6	50.0	59.3	56.1	62.7	51.9
Schedule maintenance of office equipment	53.2	1.87	1.05	.5	52.6	51.1	63.6	62.1	49.2	61.4	45.7
Perform regular maintenance of equipment	52.3	1.92	1.13	-	49.4	53.8	57.1	64.4	47.0	59.5	45.8
Prepare cost justification for purchase of office equipment and furniture	43.6	1.60	.84	2.5	35.9	52.2	35.0	45.6	42.7	38.3	46.7
Maintain inventory of software	40.5	1.64	.99	.5	40.5	41.5	36.4	50.0	36.3	44.7	37.0

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Maintain equipment leases	34.9	1.51	.85	.5	29.1	38.5	40.9	40.7	32.3	39.3	31.1
Prepare cost justification for software	31.3	1.39	.66	.5	36.7	27.7	27.3	38.3	28.1	32.9	29.6
Maintain software licenses	23.1	1.38	.89	-	22.8	24.5	18.2	33.3	18.5	25.9	20.4

There were differences in scheduling maintenance of office equipment and performing regular maintenance of office equipment based on the number of employees and administrative professionals in the organization. Companies with 50 or less employees perform those responsibilities 62.1% and 64.4%, respectively and companies with 51 or more perform those tasks 49.2% and 47%, respectively. Companies with 1 – 9 administrative professionals perform those responsibilities 61.4% and 59.5%, respectively and companies with 10 or more perform those tasks 45.7% and 45.8%, respectively.

The top three competencies in this core ability expected to be performed in the future were: evaluate/recommend equipment for purchase, prepare cost justifications for purchases, and supervise the installation of office equipment with 6, 5, and 4 respondents out of 197, or 3.0%, 2.5%, and 2.0%, respectively.

Performing Financial Functions. The responses of administrative professionals regarding performance of financial functions are revealed in Table 10 on the following pages.

Table 10

Performing Financial Functions

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Complete purchase requisitions	59.3	2.38	1.42	.5	49.4	69.1	52.4	50.0	63.2	50.6	66.1
Complete vouchers for payment	53.1	2.28	1.45	1.5	39.2	59.1	77.3	50.0	54.4	54.2	52.3
Approve bill for payment	52.8	2.39	1.56	.5	44.9	55.9	68.2	63.8	48.1	60.2	47.2
Keep record of offices expenses	51.3	2.24	1.43	-	42.3	55.8	63.6	56.7	48.9	52.9	49.1
Determine budgetary requirements	47.1	1.92	1.20	1.0	40.5	51.6	52.4	48.3	46.6	45.1	47.7
Accept payment on account	43.8	2.12	1.52	-	40.5	43.0	59.1	61.7	35.8	56.5	32.7
Reconcile cash count and receipts	43.6	2.05	1.43	-	41.0	44.2	50.0	58.3	37.0	56.5	32.4

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Maintain petty cash fund	40.0	2.04	1.49	-	42.3	35.8	50.0	60.0	31.1	54.1	27.8
Prepare bank deposits	38.7	2.03	1.50	-	35.1	34.7	68.2	59.3	29.6	54.8	25.0
Use an accounting software package	38.4	2.06	1.57	1.5	29.5	38.9	68.2	46.6	34.8	47.0	30.5
Prepare budget for administrative services	37.0	1.66	1.02	2.0	27.3	44.0	42.9	38.6	36.4	37.8	36.2
Process accounts payable invoice	36.6	1.87	1.33	.5	27.3	41.3	50.0	42.1	34.3	45.1	29.9
Prepare employer's travel voucher	36.1	1.64	.99	.5	22.8	46.2	40.9	32.8	37.5	30.1	40.4
Process payroll	34.2	1.84	1.27	1.0	28.6	34.8	52.4	42.9	30.6	40.5	29.4
Make journal entries	32.6	1.79	1.28	-	27.8	34.8	40.9	42.4	28.4	40.5	25.2
Reconcile bank statements	32.0	1.59	.97	-	26.9	28.7	63.6	46.7	25.4	42.4	22.4

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Reconcile journal	26.7	1.57	1.07	.5	25.3	26.7	31.8	35.1	23.1	32.9	20.6
Prepare tax withholding reports	15.0	1.25	.69	.5	11.5	15.1	27.3	22.8	11.8	24.4	8.3

The financial responsibilities performed most frequently by administrative professionals are completing purchase requisitions (59.3%), completing vouchers for payment (53.1%), approving bills for payment (52.8%) followed by keeping a record of office expenses (51.3%). For the most part, these tasks are not performed very often as indicated by the low means ranging from 2.24 to 2.39 but the standard deviations ranging from 1.42 to 1.56 indicate some inconsistencies in responses. Administrative professionals rarely reconcile a journal (26.7%) or prepare tax withholding reports (15.0%). The low means of 1.57 and 1.25, respectively, and low standard deviations of 1.07 and .69, respectively, imply consistent responses of infrequent performance.

Not surprisingly, the type of business has an impact on whether or not administrative professionals perform financial functions. For almost all of the competencies in this grouping, administrative professionals working in the category of Other perform financial functions more than those working in Government who perform financial duties more than those working in Service organizations. For instance, 52.4% of Other respondents process payroll as compared to 34.8% for Government and 28.6% for Service. Likewise, 68.2% of Other respondents use an accounting software package as compared to 38.9% for Government and 29.5% for Service respondents. The closest performance ratings of financial activities between the three groups business was revealed in the competencies of maintaining petty cash fund and reconciling cash where performances ranged from 35.8% to 50%.

Upon examination of the impact of the number of employees within an organization, the frequency of performance was fairly regular for the first seven financial

competencies. Differences between the two sizes of organizations appeared beginning with the maintenance of petty cash and continued with almost all of the remaining financial tasks. Organizations with 50 or less employees stated that 60% maintain petty cash while only 31.1% of respondents in organizations with 51 or more employees are responsible for petty cash. Similar frequencies emerge for reconciling cash and receipts, 50 or less, 58.3%, and 51 or more, 37%; preparing bank deposits, 50 or less, 59.3%, and 51 or more, 29.6%; and making journal entries, 50 or less, 42.4%, and 51 or more, 28.4%. On the other hand, administrative professionals employed in organizations with 51 or more employees complete purchase requisitions more (63.2%) than those employed in organizations with 50 or less employees (50%). Once again, respondents in small organizations use accounting software more than respondents in large organizations, 46.6% and 34.8%, respectively.

The number of administrative professionals within the company also influences the performance of financial functions. All but three of the competencies resulted in higher frequency of performance when there are fewer administrative professionals in the organization. In particular, competencies such as maintaining petty cash, reconciling cash and receipts, preparing bank deposits, and reconciling bank statements, confirmed performance variances between the two groups of 20% and 30%. Comparable to the results that appeared based on size of the organization, respondents employed in organizations with 10 or more administrative professionals complete purchase requisitions (66.1%) more than those employed in organizations with 1 – 9 (50.6%).

Likewise, 47% of respondents in the 1 – 9 category use an accounting software package as compared to 30.5 % for those in the 10 or more administrative professionals category.

As for expected future performance of financial functions, four respondents out of 197 or 2.0% anticipated preparing a budget for administrative services and three respondents out of 197 or 1.5% projected using an accounting software package.

Managing Records and Files. The responses regarding performance of record and file management tasks are revealed in Table 11 on the following pages. Administrative professionals responded that they retrieve information from files (93.3%), file materials (91.1%), and maintain alphabetic filing systems (88.1%) most often as suggested by the means of 4.25, 4.06, and 4.09, respectively. However, the competencies in this core ability category have standard deviations ranging from 1.12 to 1.72, which means there were sizeable discrepancies in the response frequencies. Essentially, respondents use a variety of systems and methods for managing diverse types of records and files. Conversely, responsibilities performed the least were maintaining photographs and biographical data of employees (30.8%) and maintaining magnetic media files (28.1%).

Table 11

Managing Records and Files

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Retrieve information from files	93.3	4.25	1.29	.5	92.2	94.7	90.9	91.5	94.0	94.0	92.5
File materials	91.1	4.06	1.35	.5	86.8	93.6	95.5	93.2	90.2	91.7	90.6
Maintain alphabetic filing system	88.1	4.09	1.42	-	83.5	90.3	95.5	91.5	86.7	89.3	87.0
Maintain file of addresses and telephone numbers	85.0	3.69	1.53	-	80.8	87.1	90.9	86.4	84.3	86.9	83.2
Use electronic database	82.8	3.67	1.58	.5	71.4	90.3	90.9	88.1	80.5	82.1	83.0
Search for lost materials in file	81.9	2.92	1.49	.5	84.6	78.5	86.4	81.4	82.1	81.0	82.2
Maintain classified or confidential files	79.4	3.68	1.66	-	78.5	77.4	90.9	83.1	77.8	81.0	77.8
Transfer files manually/electronically	79.1	3.28	1.59	.5	70.1	86.0	81.0	79.3	78.9	76.5	80.6

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Maintain electronic files	76.7	3.70	1.68	.5	70.5	79.8	85.7	71.2	79.1	71.1	80.6
Maintain subject filing system	75.0	3.43	1.69	-	69.2	80.4	72.7	72.9	75.9	72.6	77.4
Maintain historical records	66.5	2.52	1.46	-	61.5	72.5	59.1	65.5	66.9	63.9	69.8
Maintain chronological file	66.3	2.96	1.72	-	63.3	67.4	72.7	66.1	66.4	66.7	66.4
Log incoming records	66.0	2.78	1.66	1.0	55.3	72.2	77.3	68.4	64.9	67.9	64.8
Maintain tickler file	58.9	2.56	1.65	.5	55.8	62.4	54.5	59.3	58.6	54.8	62.3
Process records for destruction or disposition	56.7	1.99	1.12	3.6	54.4	58.0	60.0	55.9	57.0	49.4	61.8
Develop records management system and guidelines	55.7	2.09	1.30	1.5	52.6	56.5	63.6	63.8	52.2	59.0	52.3
Maintain reference library	47.4	2.08	1.44	-	47.4	50.0	36.4	47.5	47.3	47.0	48.6
Maintain disk or CD library	46.4	1.98	1.34	-	46.2	46.7	45.5	61.0	39.8	51.2	41.5

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Maintain photographs and biographical data of employees	30.8	1.62	1.15	-	31.6	22.3	63.6	45.8	24.3	42.9	21.1
Maintain magnetic media file	28.1	1.59	1.18	-	23.4	30.1	36.4	30.5	27.1	37.3	20.6

No significant trends in performance were detected between demographic groups. The competency of maintaining a disk or CD library is performed more by administrative professionals in small organizations (61%) than those in large organizations (39.8%). The same correlation emerged based on the number of administrative professionals in the business but with about a 10% disparity between the two groups. Administrative professionals in Government agencies maintain historical records (72.5%) more than Service (61.5%) and Other (59.1%). Those working in Other types of businesses log incoming records (77.3%) more than Government (72.2%) and Service (55.3%). Lastly, more administrative professionals in Government (86%) and Other (81%) organizations transfer files than those in Service (70.1%).

Out of 197, seven respondents or 3.6% anticipated processing records for destruction or disposition within the next year or two.

Communications. Administrative professionals perform communication skills as described by the competencies in Table 12 on the following pages. Administrative professionals responded that they perform communications functions as part of their job duties. They place/return telephone calls (100.0%), maintain positive customer relations (99.0%), answer incoming calls (98.5%), greet/assist visitors and clients (98.5%), respond to inquiries (98.4%), and handle confidential materials (97.4%) the most. These responses are reliable as indicated by means of 4.61 and higher and standard deviations of 1.0 or lower. On the contrary, few respondents overall (26.0%) are dictating correspondence.

Table 12

Communications

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Place/return telephone calls	100.0	4.90	.51	-	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Maintain positive customer relations	99.0	4.82	.68	-	98.7	98.9	100.0	98.3	99.3	97.6	100.0
Answer incoming calls	98.5	4.80	.72	.5	100.0	96.8	100.0	98.3	98.5	98.8	98.1
Greet/assist visitors and clients	98.5	4.61	.96	-	98.7	97.9	100.0	96.7	99.3	98.8	99.1
Respond to inquiries	98.4	4.75	.71	-	97.4	98.9	100.0	100.0	97.8	97.6	99.1
Handle confidential material	97.4	4.61	1.00	-	97.4	96.8	100.0	100.0	96.3	95.3	99.1
Keep up-to-date with technical developments	95.2	3.99	1.20	.5	94.8	94.5	100.0	94.7	95.5	92.7	97.1
Explain office procedures	92.7	3.17	1.30	1.0	92.2	92.5	95.5	89.8	94.0	90.5	95.3

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Compose routine correspondence	91.8	3.80	1.34	-	88.3	94.7	90.9	90.0	92.5	90.5	92.6
Compose written directions	88.1	3.03	1.31	.5	82.1	90.3	100.0	86.4	88.8	88.0	88.9
Orient new employees	86.7	2.44	1.07	3.0	86.8	85.9	90.0	77.6	90.8	78.6	94.1
Develop liaisons with organizations and the community	80.6	3.19	1.56	.5	80.0	78.7	90.9	86.4	78.0	83.3	78.1
Participate in task forces/committees	78.4	2.65	1.31	-	80.5	76.8	77.3	78.0	78.5	72.9	82.2
Communicate with international and culturally diverse audiences	69.5	2.58	1.49	-	74.4	68.9	54.5	72.4	68.2	63.9	73.3
Make oral presentations	57.1	1.87	.99	.5	57.1	53.8	71.4	54.2	58.3	54.2	58.5
Maintain telephone log	52.8	2.39	1.64	-	50.6	51.1	68.2	55.0	51.9	54.1	50.9
Dictate correspondence	26.0	1.39	.84	-	26.6	23.2	36.4	26.7	25.7	27.1	24.8

Making oral presentations was the only competency in this category where performance varied significantly based on type of business; 71.4% of Other respondents perform, 57.1% of Service respondents perform, and 53.8% of Government respondents perform oral presentations. The performance frequency of communication competencies was constant when comparing the size of the organization and number of administrative professionals with the exception of orienting new employees. The results were 90.8% performance for 51 or more employees and 77.6% performance for 50 or less employees. In the same way, 94.1% performance for companies with 10 or more administrative professionals and 78.6 % performance for firms with 9 or less.

The type of business impacts whether or not administrative professionals have the opportunity to communicate with international and culturally diverse audiences. For Service respondents, 74.4% indicated they do, 68.9% of Government respondents do, and only 54.5% of Other respondents do.

Orienting new employees is the competency most expected to be performed within the next few years as indicated by six respondents out of 197 or 3.0%.

Using Operating Systems. The use of operating systems by administrative professionals is illustrated in Table 13 on the next pages.

Table 13

Using Operating Systems

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Execute basic PC commands	94.9	4.71	.98	-	96.2	94.7	90.9	96.7	94.1	95.3	94.4
Boot, access, and exit operating system	91.8	4.49	1.23	-	96.2	91.6	76.2	93.3	91.0	91.7	91.7
Create directory/subdirectory	84.4	3.60	1.58	1.0	83.1	87.2	76.2	84.5	84.3	82.9	85.2
Copy one diskette to another	77.5	2.46	1.23	.5	73.1	81.5	76.2	84.7	74.2	76.2	79.0
Optimize hard disk space	72.7	2.95	1.63	.5	71.8	74.7	66.7	76.3	71.1	72.6	73.1
Convert document from one system to another	68.4	2.22	1.18	1.0	62.3	71.7	76.2	81.4	62.6	70.2	67.3
Assure backup of system	57.2	2.53	1.62	.5	52.6	60.6	59.1	66.7	53.0	63.1	52.8
Restore from backup	46.9	1.82	1.17	.5	47.4	45.7	50.0	53.3	44.0	51.2	43.5

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Install software	44.3	1.66	.95	.5	39.7	44.1	61.9	55.9	39.1	53.6	36.8
Configure operating system	40.4	1.80	1.28	.5	38.5	41.5	42.9	50.8	35.8	44.0	37.4
Delete software	38.7	1.58	.91	.5	41.6	34.4	47.6	52.5	32.6	48.8	30.5
Analyze memory configurations	38.0	1.69	1.15	1.0	33.3	40.9	42.9	47.5	33.8	40.5	35.8

The most common responsibility relating to using operating systems was executing basic PC commands (94.9%). Several other competencies in this category had high frequencies for performance but low means and high standard deviations, denoting that responses were irregular. For example, creating directory/subdirectory resulted in a performance rating of 84.4% but had an average of 3.60 and a standard deviation of 1.58. Deleting software (38.7%) and analyzing memory configurations (38.0%) were the competencies least performed by administrative professionals.

The responsibilities of installing and deleting software produced noticeable variances in performance based on type of business and number of employees and administrative professionals in the organization. Of the respondents, 61.9% of Other performs software installation, 44.1% of Government performs, and 39.7% of Service performs. Whereas 55.9% and 52.5% of companies with 50 or less employees and 39.1% and 32.6% of companies with 51 or more employees install and delete software, respectively. Likewise, 53.6% and 48.8% of companies with 1 – 9 administrative professionals while 36.8% and 30.5% of companies with 10 or more administrative professionals install and delete software, respectively.

Generally, administrative professionals within small organizations perform activities relating to using operating systems more than those within large organizations. The frequency percentages for small companies, 50 or fewer employees, were higher for all but one of the 12 competencies.

Only one or two administrative professionals out of 197, or .5% and 1.0%, respectively estimated to perform each of the competencies in this core ability category.

Document Production. The competencies performed by administrative professionals in the category of document production are presented in Table 14 on the following pages. As expected, administrative professionals reported that they correct grammar and punctuation in documents (97.9%), use the spell check feature in software (97.4%), print data (96.9%), make photocopies (96.4%), and proofread documents (95.9%). The high means and low standard deviations support the reliability and validity of these frequencies. Once again, although many of the frequencies for the competencies in this category were over 70%, the standard deviations over 1.00 suggested some discrepancies in responses. For 37 competencies out of 42, performance of 50% or greater was cited. The competencies with the lowest performance rankings were taking dictation at the keyboard (40.0%) and taking dictation in shorthand (22.2%). The correspondingly low mean and low standard deviations for these two tasks imply consistency.

Table 14

Document Production

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Correct grammar and punctuation in document	97.9	4.56	.97	-	96.2	98.9	100.0	95.0	99.3	97.6	98.1
Spell check a document using software	97.4	4.54	1.02	-	96.2	98.9	95.5	93.3	99.3	96.5	98.1
Print data	96.9	4.61	.93	-	92.3	100.0	100.0	94.9	97.8	96.4	97.2
Make a photocopy of document	96.4	4.68	.90	-	93.6	97.9	100.0	93.3	97.8	96.5	96.3
Proofread document for content, format, and typographical errors	95.9	4.50	1.05	-	91.0	98.9	100.0	93.3	97.0	94.1	97.2
Utilize the Help function	94.8	3.20	1.19	-	92.3	96.8	95.5	93.3	95.5	92.9	96.3
Search data	94.8	3.65	1.27	-	90.9	97.9	95.5	93.3	95.5	91.8	97.2

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Revise existing documents	94.2	3.85	1.25	.5	92.1	94.6	100.0	91.4	95.5	94.0	94.3
Manipulate text or data using software	90.3	3.86	1.43	-	87.2	92.6	90.9	91.7	89.6	92.9	88.0
Use Search/Replace feature	89.2	3.44	1.45	-	82.1	94.7	90.9	88.3	89.6	90.6	88.0
Create new documents using word processing software	89.2	4.03	1.37	-	84.4	91.6	95.5	86.7	90.3	88.1	90.7
Key mailing labels and envelopes	88.6	3.80	1.41	-	83.3	91.4	95.5	88.1	88.8	90.5	86.9
Create and edit a database	88.5	3.30	1.37	.5	85.7	92.5	81.8	86.7	89.4	86.9	89.6
Key correspondence	88.1	3.91	1.39	-	85.9	89.5	90.5	89.8	87.4	86.9	88.9
Complete preprinted forms	87.1	3.30	1.35	-	82.1	90.4	90.9	81.7	89.6	85.9	87.9
Edit a document using the Thesaurus	86.7	3.12	1.43	-	85.9	89.5	77.3	85.0	87.4	82.4	89.8

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Design forms	85.4	2.97	1.29	.5	79.5	88.0	95.5	81.7	87.1	87.1	83.8
Merge form letters	82.8	2.89	1.36	.5	80.8	85.9	77.3	85.0	81.8	83.5	81.9
Key document from edited rough draft	82.4	3.38	1.51	-	77.9	84.0	90.9	85.0	81.2	85.9	79.2
Compose copy to be keyed	82.2	2.97	1.40	-	75.0	83.9	100.0	83.3	81.7	84.7	80.8
Insert graphic in a document	81.4	2.86	1.38	-	75.6	84.0	90.9	83.3	80.6	84.7	78.5
Determine optimum process for reproduction of printed materials	80.4	3.15	1.51	-	74.4	81.9	95.5	81.7	79.9	80.0	80.4
Key document from longhand	79.4	3.42	1.56	-	69.2	84.0	95.5	80.0	79.1	81.2	78.5
Design tables depicting data	78.9	2.79	1.34	-	72.7	84.2	77.3	79.7	78.5	78.6	78.7
Paste-up materials to be printed	78.2	2.99	1.49	-	75.6	78.5	86.4	83.1	76.1	82.1	74.8

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Key statistical data in documents	77.1	2.82	1.44	-	76.6	77.7	76.2	77.6	76.9	74.7	79.4
Create word processing directory/subdirectory index	76.8	2.72	1.39	-	74.0	78.9	77.3	84.7	73.3	77.4	75.9
Key data to prepare graphs and charts	76.7	2.51	1.27	-	74.0	77.7	81.8	78.0	76.1	77.4	75.7
Create document using spreadsheet software package	76.6	2.76	1.34	1.0	64.9	82.8	90.5	70.7	79.2	72.0	79.8
Key correspondence using variable inserts	74.2	2.82	1.48	.5	71.8	75.8	76.2	78.3	72.3	71.8	76.7
Transcribe or record minutes of meetings	71.5	2.39	1.18	.5	76.9	71.0	54.5	71.2	71.6	67.9	74.8
Design/produce visuals	71.3	2.27	1.17	-	66.7	73.7	77.3	76.7	68.9	71.8	70.4
Create a template	68.9	2.14	1.07	.5	63.6	73.4	68.2	73.3	66.9	69.0	68.2
Identify appropriate software for job	68.6	2.71	1.58	1.5	67.5	67.4	77.3	69.0	68.4	66.3	69.8

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Key manuscripts	61.1	2.27	1.36	-	59.7	60.0	71.4	62.7	60.4	60.7	61.7
Scan data or graphics into a document electronically	60.6	2.12	1.21	.5	53.2	66.0	63.6	59.3	61.2	60.0	61.3
Develop a macro	50.5	1.72	.89	.5	51.9	48.9	52.4	55.2	48.5	49.4	51.4
Obtain notarization for document	49.5	1.80	1.06	-	49.4	44.1	72.7	52.5	48.1	53.6	46.2
Transcribe dictation into mailable documents	45.6	2.03	1.42	-	43.6	49.5	36.4	46.7	45.2	45.9	45.4
Key document from machine transcription	41.8	1.89	1.36	-	42.9	36.8	59.1	40.0	42.5	42.4	41.1
Take dictation at the keyboard	40.0	1.66	.98	-	39.7	40.0	40.9	33.3	43.0	35.3	43.5
Take dictation in shorthand	22.2	1.42	.97	-	23.1	21.3	22.7	20.0	23.1	21.2	22.4

The type of business produced noteworthy deviations for the responsibility of administrative professionals to key documents from longhand. Other respondents reported 95.5% performance, Government reported 84% performance, and Service reported 69.2% performance of this competency. The traditional administrative task of transcribing/recording minutes of meetings also exhibited variation among the types of businesses; 76.9% of Service respondents perform, 71% of Government respondents perform, and 54.5% of Other respondents perform this task. Software usage also fluctuates based on the type of business; 90.5% of Other respondents create documents using spreadsheet software as compared to 82.8% of Government respondents and only 64.9% of Service respondents.

Since many of the competencies in this category are already being performed at high percentages, very few respondents predicted performing these tasks in the future.

Information Distribution. Tasks related to the distribution of information as performed by administrative professionals are portrayed in Table 15 on the next pages. Administrative professionals described sending documents via fax (99.0%), receiving documents via fax/modem (98.4%), and preparing correspondence and documents for mailing (97.3%) as common job responsibilities. It is apparent that this information is dependable based on the high means and low standard deviations. All of the remaining competencies involving distribution of information revealed performance ratings between 93.7% and 64.7% but the standard deviations between 1.16 and 1.89 suggest some contradictions between frequency categories.

Table 15

Information Distribution

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Send document via fax	99.0	4.37	.91	-	98.7	98.9	100.0	96.7	100.0	98.8	99.0
Receive document via fax/modem	98.4	4.37	.99	-	96.1	100.0	100.0	98.3	98.5	100.0	97.1
Prepare correspondence and document for mailing	97.3	4.49	.97	-	94.7	98.9	100.0	94.8	98.4	96.4	98.0
Distribute materials	93.7	4.19	1.28	-	92.2	94.6	95.5	91.7	94.7	92.9	94.3
Respond to electronic mail messages	92.7	4.55	1.16	-	91.0	94.6	90.9	86.7	95.5	87.1	97.2
Process incoming mail	91.7	4.20	1.36	.5	88.5	94.6	90.9	86.7	94.0	88.1	94.4
Process outgoing mail	91.2	4.19	1.38	-	91.0	90.4	95.5	95.0	89.6	95.3	87.9
Prepare packages for shipping	89.9	3.14	1.35	-	88.3	89.9	95.5	93.1	88.5	96.3	84.8

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Handle specialized incoming mail	89.5	3.59	1.45	-	85.9	91.2	95.5	88.3	90.1	89.4	90.4
Utilize information database	89.2	3.83	1.41	-	84.6	91.6	95.5	90.0	88.9	88.2	89.8
Transmit and monitor electronic mail	88.6	4.33	1.39	-	84.6	92.5	86.4	85.0	90.2	81.2	94.3
Respond to voice mail	78.3	3.89	1.69	2.0	77.9	80.4	70.0	67.8	83.1	72.6	82.5
Arrange for courier services	72.2	2.56	1.40	-	71.8	68.1	90.9	75.0	70.9	76.5	68.2
Send document via modem	66.8	2.97	1.72	-	68.8	67.0	59.1	75.0	63.2	70.6	64.2
Retrieve messages from answering machine	64.7	3.37	1.89	.5	68.4	63.0	59.1	68.3	63.1	64.7	65.0

The survey results relating to distribution of information are consistent with findings discovered during the review of literature. The majority of administrative professionals, regardless of demographic characteristics, control the distribution and exchange of a vast assortment of information within organizations. It is interesting to note that administrative professionals working in organizations with 51 or more employees report higher frequency (83.1%) of responding to voice mail than those in organizations 50 or less employees (67.8%).

Producing Desktop Publishing Documents. The results of competencies performed by administrative professional in a desktop publishing capacity are revealed in Table 16 on the subsequent pages. The competencies of creating multi-column documents (73.7%), creating multi-page documents (73.3%) and creating bulletins, flyers, and announcements (72.1%) were identified as those desktop publishing functions most often performed by administrative professionals. However, the means of 2.70, 2.91, and 2.42, respectively, and standard deviations of 1.41, 1.53, and 1.18, respectively, imply that most of the respondents do not perform these tasks regularly. Administrative professionals seldom create business cards (32.5%).

Performance of desktop publishing functions was predominantly consistent between the different types of businesses. Except administrative professionals in Other industries reported higher frequency (61.9%) of preparing publications for commercial printing than Government and Service did (47.8% and 45.5%, respectively).

Table 16

Producing Desktop Publishing Documents

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Create multi-column document	73.7	2.70	1.41	1.0	71.8	74.7	76.2	80.4	70.9	77.8	71.0
Create multi-page document	73.3	2.91	1.53	1.0	71.8	72.0	85.0	80.7	70.1	79.0	69.4
Create bulletins, flyers and announcements	72.1	2.42	1.18	1.5	73.1	70.7	75.0	81.0	68.2	79.3	67.0
Create a design/publication using clip art, boxes, shading, lines and illustrations created with drawing and paint tools	69.3	2.40	1.24	1.5	67.9	71.4	65.0	69.0	69.5	71.6	67.9
Create charts and graphs	66.5	2.13	1.09	1.5	65.4	67.4	66.7	74.1	63.2	69.9	64.2
Create and use templates	63.5	2.19	1.22	1.0	61.5	66.7	57.1	69.0	61.2	66.3	61.7
Create brochures	60.5	2.01	1.02	1.5	60.3	62.6	52.4	71.9	55.6	64.6	57.5

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Design a desktop published document	55.8	2.02	1.17	2.0	51.9	57.0	65.0	68.4	50.4	67.9	46.7
Create a newsletter using headings, wrap-arounds and graphics	55.7	1.96	1.08	1.5	55.1	57.0	52.4	64.4	51.9	62.7	50.5
Understand publishing design principles	54.0	2.01	1.22	2.0	50.6	56.7	55.0	63.6	50.0	62.0	48.1
Import text, charts, tables and other graphics from other software programs into a desktop-published document	53.1	1.81	1.00	.5	49.4	54.3	61.9	56.1	51.9	54.9	51.9
Create, edit and save style sheets	51.0	1.93	1.19	.5	44.9	59.1	38.1	50.0	51.5	51.8	51.4
Create flow charts	48.4	1.59	.72	1.5	48.1	47.8	52.4	51.7	47.0	46.3	50.0
Prepare publications for commercial printing	48.4	1.67	.85	1.5	45.5	47.8	61.9	62.1	42.4	58.5	40.6
Prepare a paste-up for a multi-page booklet	47.1	1.70	.93	2.0	44.9	49.5	45.0	54.4	43.9	50.6	44.3

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Insert scanned graphics/photos into existing page layout	47.1	1.80	1.04	1.5	47.4	45.7	52.4	54.4	44.0	51.2	43.9
Create business cards	32.5	1.46	.81	1.0	23.4	38.7	38.1	36.8	30.6	34.1	30.8

Administrative professionals in organizations of 50 or less employees revealed higher frequencies of performance for all but two desktop publishing competencies of which the variance was only .5% and 1.5%. Just the same, respondents in firms with 1 – 9 administrative professionals revealed higher frequencies of performance for all but one desktop publishing competency.

Between one and four respondents out of 197 (.5% to 2.0%) expected to perform all of the desktop publishing responsibilities in the future.

Supervising Personnel. The results of competencies performed by administrative professional in a supervisory role are displayed in Table 17 on the following page. Administrative professionals conveyed the most commonly performed supervisory competencies as explaining office procedures (81.3%) and orienting new employees (75.1%). Even so, the means of 2.44 and 2.12, respectively, suggest that they do not habitually perform these tasks. The three competencies involving developing and updating policies and procedures are not as often performed with frequencies between 45.2% and 38.0%. The reliability of performance levels represented in the area of supervising personnel was confirmed by the low standard deviations for most of the competencies in this category.

Table 17

Supervising Personnel

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Explain office procedures	81.3	2.44	1.14	2.5	82.7	80.0	81.8	80.7	81.5	78.3	84.3
Orient new employee	75.1	2.12	.97	2.0	78.7	73.0	71.4	76.4	74.6	72.8	77.5
Conduct employee training	57.5	1.89	1.02	1.5	63.0	50.5	68.2	63.2	55.0	58.0	58.3
Interview applicant for employment	52.1	1.71	.85	1.5	60.5	47.8	40.9	47.5	54.2	44.0	59.6
Develop applicant interview questions	47.1	1.63	.80	1.0	56.6	40.7	40.9	47.5	46.9	45.2	49.5
Update administrative services procedures manual	45.2	1.68	.93	3.0	49.3	37.0	66.7	53.6	41.7	50.6	41.9
Develop personnel policies	42.4	1.61	.87	1.5	49.4	34.4	52.4	58.6	35.3	50.6	35.8
Develop administrative services procedures manual	38.0	1.57	.88	2.5	40.8	31.1	57.1	49.1	33.1	42.7	34.0

Performance of supervision competencies differ based on type of business. In examining the four competencies relating to policies, procedures, and training, more Other respondents perform than do Service respondents followed by Government respondents. For developing personnel policies, performance ratings were 52.4% Other, 49.4% Service, and 34.4% Government. Similarly, for developing administrative procedures, performance ratings were 57.1% Other, 40.8% Service, and 31.1% Government. The results show that respondents are conducting employee training: 68.2% Other, 63% Service, and 50.5% Government. More Service industry respondents (approximately 57%) are involved with developing interview questions and interviewing applicants than Government and Other respondents (approximately 41% each).

For the competencies of developing personnel policies, developing administrative services procedures manual, and updating administrative services procedures, performance ratings were 58.6%, 49.1%, and 53.6%, respectively, for the 50 or less employees category and 35.3%, 33.1%, and 41.7%, respectively, for the 51 or more employees category.

For the competency of developing personnel policies, performance ratings were 50.6%, for the category of 1 – 9 administrative professionals and 35.8% for the category of 10 or more. Yet more respondents working in organizations with 10 or more administrative professionals (59.6%) are interviewing applicants than respondents working with 1 – 9 administrative professionals (44%).

Updating the administrative procedures manual was highest on this list for anticipated future performance with six out of 197 responding or 3.0%. Developing the

manual and explaining office procedures tied for imminent performance with five respondents each out of 197 or 2.5%. However, all of the supervisory competencies had at least two respondents out of 197 or 1.0% predicting performance.

Other Skills. The execution of other essential business skills by administrative professionals is presented in Table 18 on the subsequent page. Most administrative professionals demonstrate behaviors appropriate to the business or industry (94.3%), demonstrate business ethics (92.7%), assist in achieving goals set by the organization (92.7%), and participate in professional development activities (91.6%). Only about half of the respondents, or 53.3%, stated that they are applying workplace ergonomic principles but the mean of 2.48 proves that they are not performing frequently. More respondents in Other organizations (68.2%) are applying workplace ergonomic principles than those in Government (54.0%) and Service (48.0%) industries. No other major variations were discovered between the demographic classifications for this set of competencies.

Table 18

Other Skills

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Demonstrate behaviors appropriate to business or industry	94.3	4.52	1.12	-	94.9	95.7	86.4	98.3	92.4	92.9	95.3
Demonstrate business ethics	92.7	4.44	1.21	-	93.6	93.5	86.4	98.3	90.2	90.5	94.3
Assist in achieving goals set by employing organization	92.7	4.29	1.25	-	92.3	94.5	86.4	96.6	90.9	91.7	93.3
Participate in professional development activities	91.6	3.21	1.30	.5	92.1	92.4	86.4	87.9	93.2	88.0	94.3
Apply workplace ergonomic principles	53.3	2.48	1.71	1.5	48.0	54.0	68.2	45.5	56.6	50.0	55.9

Business Technology. The category of new and emerging business technology utilized by administrative professionals can be divided into three main categories. Software applications and equipment is summarized in Table 19 on the next pages. Internet and web design and maintenance competencies are described in Table 20 and multimedia is explained in Table 21 on the succeeding pages.

The highest performances were specified by administrative professionals in the competencies of integrating software applications (39.1%), using a meeting software (20.3%), designing forms using forms software (19.9%), and using a digital camera (18.6%) although they do not perform these tasks on a regular basis as confirmed by means of 1.84 or less. Moreover, computer pens (4.7%), personal digital assistants (4.2%), and electronic whiteboards (4.2%) are hardly ever used by respondents of this study. The reliability of performance levels represented in the area of software applications and equipment was confirmed by the low standard deviations for all but one of the competencies in this category.

Administrative professionals in Other types of businesses use a digital camera (27.3%) more than Government (18.9%) and Service (15.8%). The same is true for utilization of a meeting software; 31.8% Other, 19.1% Government, and 18.4% Service and use of a forms software; 31.8% Other, 18.4% Service, and 18.2% Government.

Table 19

Software Applications and Equipment

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Integrate software applications	39.1	1.84	1.27	1.5	29.3	44.3	52.4	32.1	42.2	30.9	45.5
Set up or attend meetings using a meeting software	20.3	1.35	.85	2.0	18.4	19.1	31.8	22.0	19.5	19.0	20.8
Design forms using forms software	19.9	1.37	.86	1.5	18.4	18.2	31.8	17.2	21.1	21.7	18.8
Use a digital camera to add graphics to documents and/or Web pages	18.6	1.32	.78	1.0	15.8	18.9	27.3	24.1	16.2	19.5	17.3
Use a business decision software	6.9	1.08	.31	.5	6.5	7.9	4.5	8.5	6.2	7.1	6.9
Use voice recognition software to input data	6.8	1.09	.39	-	9.1	5.4	4.5	6.7	6.8	5.9	7.6

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Use a project management software to organize company projects	6.3	1.08	.36	.5	10.4	2.2	9.5	8.5	5.4	7.1	5.8
Use a computer pen to input data	4.7	1.09	.48	-	5.2	3.2	9.1	5.0	4.5	4.7	4.8
Use a personal digital assistant (PDA)	4.2	1.07	.44	.5	6.6	2.2	4.5	5.1	3.8	4.8	3.8
Use an electronic whiteboard to upload handwritten notes to a computer	4.2	1.05	.24	.5	7.8	2.2	-	3.4	4.6	3.6	4.9

There was also a sizeable distinction between the types of businesses and the integration of software applications by administrative professionals. A total of 52.4% of Other and 44.3% of Government respondents convey integrating software applications but only 29.3% of Service industry respondents report doing so. That responsibility also differed based on the number of administrative professionals; 45.5% performance was noted in the group of 10 or more and 30.9% performance in the group of 1 – 9 administrative professionals. Correspondingly, performance of integrating software applications was higher in organizations of 51 or more employees by about 10%.

Almost all of the business equipment and software applications in this category have some projected future performance by administrative professionals. Four out of 197 (2.0%) expected to set up/attend meetings using a meeting software. Out of 197, three participants or 1.5% anticipated designing forms using a forms software and integrating software applications while two individuals or 1.0% predicted using a digital camera to add graphics to documents or web pages. Only one of 197 each or .5% of respondents predicted using personal digital assistants, business decision software, project management software, or electronic whiteboards within the next two years.

Table 20

Internet / Web Design and Maintenance

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Conduct Internet research	67.6	2.52	1.40	-	64.9	71.9	59.1	70.7	66.2	66.3	68.9
Apply Web design principles	22.5	1.42	.92	1.0	15.6	29.5	18.2	22.4	22.5	20.7	24.3
Update Web pages	19.8	1.36	.83	3.6	16.0	22.4	22.7	28.1	16.0	25.9	15.2
Use HTML to update Web pages	18.1	1.33	.81	2.5	16.0	22.4	9.1	19.3	17.6	17.5	19.0
Design Web pages	14.8	1.20	.56	3.6	12.0	17.4	13.6	19.3	12.7	17.3	13.0
Apply data security principles	13.8	1.33	.96	.5	13.0	14.3	14.3	17.2	12.2	16.9	11.5
Create graphics or Web objects using a graphic design software	9.6	1.16	.59	1.5	10.4	6.7	19.0	15.5	7.0	14.5	4.9

(table continues)

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Apply e-commerce principles for conducting business online	8.0	1.14	.60	1.0	6.5	8.9	9.5	13.8	5.4	13.3	3.9
Apply intellectual property laws in digital environments (Copyright)	4.8	1.07	.37	1.0	3.9	4.4	9.5	6.9	3.8	6.0	2.9
Use XML to update/maintain Web pages	3.2	1.05	.33	1.0	3.9	2.2	4.5	3.4	3.1	4.8	2.0
Use XML to create Web pages	2.7	1.04	.33	1.0	3.9	1.1	4.5	3.4	2.3	4.8	1.0

Respondents declared that they conduct Internet research (67.6%) but the mean of 2.52 and standard deviation of 1.40 point out some contradiction in frequency of performance. Some administrative professionals apply web design principles (22.5%), update web pages (19.8%), and use HTML to update web pages (18.1%) although they are not as likely to design the web pages (14.8%). The responsibilities of applying intellectual property laws in digital environments (4.8%), using XML to update/maintain web pages (3.2%), and using XML to create web pages (2.7%) are almost never performed by administrative professionals. Performance rankings represented in this core ability category were consistent as confirmed by the low standard deviations for all but one of the competencies.

Administrative professionals in Government organizations conduct Internet research more (71.9 %) more than Service (64.9 %) and Other (59.1 %). Those working in Government also use HTML to update web pages (22.4%) as compared to Service (16%) and Other (9.1%). The frequencies for Government and Service companies are the same for updating web pages not using HTML but Other (22.7%) reported higher frequency. On the other hand, more administrative professionals working in Other organizations create graphics using a graphic design software (19%) than they do in Service (10.4%) and Government (6.7%).

The responsibility of updating web pages was higher in small firms than in large organizations by about 12%. That correlation also existed in businesses with fewer administrative professionals where performance was higher by about 11%.

Almost all of the competencies in this category have some projected future performance by administrative professionals. Seven out of 197 (3.6%) anticipated updating and designing web pages and five of 197 (2.5%) foresaw using HTML to update web pages. Furthermore, the creation of graphics/web objects using a graphic design software was projected by 3 of 197 or 1.5% of administrative professionals.

Table 21

Multimedia

Competency	Percent Who Perform	Mean	Std. Deviation	Percent Who Will Perform in Next 1 – 2 Years	Percent Who Perform Based on Type of Business			Percent Who Perform Based on Number of Employees in Organization		Percent Who Perform Based on Number of Administrative Professionals in Organization	
					Service	Government	Other	50 or Less	51 or More	1 – 9	10 or More
Use a CD-RW (read/write drive)	19.2	1.40	.96	2.0	14.5	24.7	14.3	19.6	19.0	20.0	18.0
Apply multimedia design principles	8.5	1.13	.51	.5	7.8	8.9	9.5	14.0	6.1	9.8	6.7
Combine multimedia components in digital environments	6.5	1.10	.45	.5	6.8	6.7	4.8	10.5	4.7	7.3	5.0
Develop multimedia components	6.4	1.10	.44	1.0	6.7	6.6	4.8	10.7	4.6	7.4	4.8

Administrative professionals use a CD read/write drive (19.2%) more than they perform any other multimedia functions. However, the mean of 1.40 for that task indicates that they rarely do it. In addition, the only noteworthy distinction for multimedia based on demographics is that the use of a CD read/write drive is more prevalent in Government (24.7%) than in Service and Other (approximately 14% each). Additionally, four respondents out of 197 or 2.0% anticipated using a CD-RW drive within the next two years.

## Chapter 5

### Summary, Conclusions and Recommendations

In this chapter, the study will be summarized and conclusions based on the results will be discussed. Finally, recommendations related to this study will be presented.

#### Summary

The purpose of this research was to provide data for the Administrative Assistant degree program at Chippewa Valley Technical College. After a review of literature, a questionnaire was developed and pilot tested. The purpose of the questionnaire was to identify job competencies of administrative professionals, determine present and future software and technology needs for the profession, and identify present and future job titles of administrative professionals in the west central Wisconsin area. Two groups were surveyed within the Eau Claire region. The populations surveyed included attendees from the 2000 and 2001 IAAP Office Personnel Seminars, the mailing list for the UW-Stout Administrative Professionals luncheon, and attendees of the 2001 UW-Stout Administrative Professionals luncheon.

Survey data was analyzed using SPSS software. A report of frequency counts, percentages, mean, and standard deviation was generated. Cross tabulation reports of frequency counts and percentages between the different survey groups and demographic groups were also printed. Finally, cross tabulation reports of frequency counts and percentages of the collapsed demographic groups were created. Data were presented and discussed according to the sequence of the survey instrument.

## Conclusions

There were four research objectives addressed by this study. Each objective will be restated and conclusions made for each.

Research Objective Number One: Identify administrative assistant competencies in the Eau Claire region:

The study identified specific competencies that are currently being performed by administrative professionals working in businesses in West Central Wisconsin. A thorough listing of competencies was identified and ranked in order of performance by administrative professionals. See Tables 8 through 21 for a complete list of competencies.

Many of the competencies traditionally thought of as administrative assistant duties, are overwhelmingly still performed by administrative professionals. The results confirmed that administrative professionals are responsible for performing a variety of organizing and planning functions within the company, maintaining equipment and supplies, managing records and files, distributing information, and producing a vast assortment of documents. Furthermore, administrative professionals must have excellent communication skills because of their interaction with clients, colleagues, and the community.

The role of administrative professionals is changing and responsibilities are increasing as documented by the review of literature and the survey conducted. Although the performance ratings for some of the competencies were rather low, respondents were nevertheless indicating some performance of all of the job responsibilities identified in the survey instrument. In other words, for administrative professionals in this region, a

few of the tasks may not be considered normal or recurrent job duties, but those competencies are still being performed. Administrative professionals may be called upon to perform such responsibilities for a special project, in the absence of a co-worker, or based on the size of the organization or type of business. Therefore, the identification of any and all competencies being performed is an indication of a training need.

Consequently, the Business Technology Department within Chippewa Valley Technical College is able to update its Administrative Assistant degree program and curriculum based on this study.

Research Objective Number Two: Determine the present and future software and technology needs of administrative professionals in the Eau Claire region:

The study also verified the present software and technology needs of administrative professionals in the Eau Claire area. Administrative professionals are currently using CD-RW drives, scanners, digital cameras, meeting software, forms software more than some of the other progressive technologies and software. Many administrative professionals are conducting Internet research and some are responsible for designing and updating Web pages. However, evidence gathered suggests that use of advanced and innovative software applications by administrative professionals is not prevalent. Depending on the type and size of the organization, administrative professionals are required to use a variety of technologies and software applications in the performance of their job functions. Although some innovative technologies like computer pens and personal digital assistants or advanced software such as voice

recognition are not widely being used by administrative professionals at the present time, the technologies themselves may still be emerging, transforming, and improving.

Specifically, Tables 19, 20, and 21 summarize the software and technology competencies that were identified by the review of literature. The future software needs of administrative professionals as indicated by this study are software applications that aid in the performance of accounting functions, desktop publishing, web page design, project management, as well as meeting software and forms software. The expected technology needs of administrative professionals included digital cameras, personal digital assistants, and CD read/write drives.

Further technological maturity as well as informed knowledge about how innovations and advanced software can be used in business will inevitably merge the technologies uncovered by the review of literature into the typical responsibilities of administrative professionals. Moreover, administrative professionals surveyed may not be directly involved in long range planning efforts within their organization and therefore, may not have first-hand knowledge about the implementation of advanced software and innovative technology.

Research Objective Number Three: Identify present and future job titles of administrative professionals in the Eau Claire region.

The study identified present job titles and explored the preferred use of contemporary and progressive job titles for this occupation. The results established that administrative professionals work under a variety of different job titles. See Table 4 for a complete list of job titles identified.

Within the category of Government, being most identified by participants, it is not surprising that traditional job titles of secretary, program assistant, administrative assistant, and clerk were prevalent. It was surprising that no consensus on a preferred job title other than administrative assistant for this occupation could be reached. One explanation could be that since the job titles are mandated by government classifications, changing them would be difficult and would require a statewide transformation. Another rationalization might be that individuals in this occupation are not as concerned about the professionalization of job titling or the image of professionalism as the administrative profession itself is. Overall, respondents were not dissatisfied with the title of administrative assistant. As a result, there was no consensus on a preferred job title for this occupation.

Research Objective Number Four: Determine if there is a difference in administrative assistant competencies and present and future software and technology needs of administrative professionals based on demographics in the Eau Claire region.

The correlations between administrative assistant competencies and present and future software and technology needs of administrative assistants based on demographics were examined. There were some differences in performance of competencies by administrative professionals based on demographic criteria. Depending on the size of the organization and type of business, administrative professionals may perform more financial functions, computer hardware and software responsibilities, and assume supervisory roles. Also, those working in small businesses were more likely to perform desktop publishing responsibilities.

### Recommendations

The results of this study present several suggestions for individuals affected by or working in this field to consider.

For Administrative Professionals. Administrative professionals must be proactive about their career, keep up-to-date, and strive for continuous learning. A plan of action to accomplish this goal and to help administrative professionals get ahead and stay ahead includes:

1. The results of the study showed that almost all of the respondents participate in professional development activities and yet very few respondents were members of the IAAP. The lack of active participation in the organization associated with the profession was disturbing. Perhaps attempts are being made to professionalize the role of administrative assistants more from the organizational level rather than the individual level. Conceivably, efforts to professionalize this occupation have to come from the bottom up as well as the top down and across every level in between. Administrative professionals may get involved in organizations such as the International Association for Administrative Professionals, read professional publications, and attend conferences and seminars to enhance and maintain their skills (Miller, 1997).
2. The active pursuit of continuing education may help administrative professionals to develop awareness about advanced software and innovative technologies as indicated by the results in Tables 19, 20, and 21. Relevant educational opportunities and training may be available within the company or

provided by external sources. Professionals may attend training sessions about a variety of important job skills. Ongoing learning about business skills and trends will help administrative professionals stay professionally current and personally re-energized. Seminars or technical college courses about new or updated computer software packages and business technologies will assist administrative professionals in becoming computer software experts (IAAP On-line). Also, through continuing education, administrative professionals demonstrate their willingness to accept expanding job responsibilities and changing job roles.

3. By acquiring industry certifications, administrative professionals demonstrate their ability to perform challenging job responsibilities and diminish the stereotype of the traditional secretary. Obtaining credentials of Certified Professional Secretary and/or Microsoft Office User Specialist offers proof of an individual's productivity, skills, and knowledge and possibly an advantage in a competitive business market for jobs and promotions (MOUS On-line).
4. Almost all of the respondents indicated that they plan and organize their own work. It is important that administrative professionals take initiative on the job and do not wait to be asked to do something (IAAP On-line). Along the same lines, administrative professionals should take an interest in continuous improvement by encouraging innovation and finding ways to offer assistance, ideas, and recommendations for new and improved processes and procedures within an organization (IAAP On-line and Miller, 1997).

5. The comprehensive listing of job competencies contained in this study confirms the willingness of administrative professionals to learn and perform beyond simple secretarial tasks. Furthermore, employers expect their administrative professionals to bring greater value to the workplace through skills beyond the traditional scope of a secretary (IAAP On-line). Getting cross-trained and learning as much as possible on the job is important as indicated by at least some participant performance of all of the competencies included in this study. For instance, administrative professionals may not regularly perform many of the financial functions in Table 10 but may be expected to complete any one of those tasks at a particular time.

Consequently, the more an administrative professional knows about other job functions within an area, department, or division, the more valuable he/she is to the company (IAAP On-line).

6. Based on the review of literature which revealed the occupational transformation that occurred over the last decade and still continues today, administrative professionals must demonstrate flexibility, be willing to take on additional responsibility, and face challenges and changes in the workplace (IAAP On-line and Miller, 1997).

7. The study showed that administrative professionals act autonomously. Participants rated the organizing and planning functions high for performance. What's more, employers expect administrative professionals to be able to make decisions independently in addition to organizing, planning, and

managing their own work, schedules, and business functions such as conferences and meetings (IAAP On-line).

8. Administrative professionals often monitor supply and equipment purchases as well as maintenance agreements and schedules as indicated by the study. Therefore, it is necessary to become techno-literate (Lapp, 1997) and keep informed about available business equipment, accessible vendors, and technology trends, and how emerging technology can be used within the organization (IAAP On-line).
9. Respondents cited high levels of performance for many of the record and file management competencies. Also, administrative professionals frequently conduct research and facilitate project management from conception to completion (IAAP On-line) and thus, must be able to manage information efficiently.
10. The results of the study prove that customer service, interpersonal, and communication skills are essential. Administrative professionals must be able to communicate effectively. The IAAP (On-line) also recommends becoming the communications hub for the organization.
11. Survey respondents agreed that they train others on equipment, explain office procedures, and orient new employees; responsibilities that preserve the continuity of organizational knowledge. Many administrative professionals are taking on organizational leadership roles of training and supervision (IAAP On-line). Moreover, Lapp (1997) suggests breaking a few rules and

positioning oneself to be “a key player in the loop”. In other words, “successful administrative professionals will be those who demonstrate their value to the company” (McEwen, 1997).

For Businesses and Educators. Businesses and business educators need to provide learning opportunities for administrative professionals that enhance and grow their skills. Although this study focused only on technical skills, mastery of soft business skills facilitates maximum job performance and therefore success. McEwen (1997) recommends that businesses and business education instructors promote both soft skills and technical skills when preparing office professionals for the next century:

1. Teach strong technology skills. The study verified that administrative professionals utilize technology in almost every aspect of their job.
2. Teach teamwork skills. The largest numbers of respondents work for organizations with 51 or more employees making teamwork an essential skill. But regardless of size of the organization, responsibilities of administrative professionals typically have an effect on many people in the company.
3. Teach problem-solving skills.
4. Teach the importance of loyalty, dedication, and strong work ethic.
5. Encourage administrative professionals to familiarize themselves with the goals, policies, procedures, and the culture of the organization in order that they may work more efficiently and effectively.

6. Develop resiliency. Administrative professionals must learn to adapt and be receptive to change in the areas of job roles, software, and technology as suggested by this study.
7. Prepare administrative professionals for lifelong learning. Businesses and educational institutions should offer ongoing professional development and continuing education opportunities for administrative professionals that address the variety of skills and responsibilities encompassed in this study.

Related to this Study. Business educators should also consider a few additional recommendations related to this study:

1. Initiate efforts toward professionalism of this occupation. The Chippewa Valley Technical College and other colleges within the Wisconsin Technical College System can begin a program shift that focuses on professionalism, management/supervision skills, extensive, diverse, and advanced software expertise, and innovative business technologies.
2. Determine why many of the respondents were not able to make predictions about future software and technology needs. The Business Technology Department should continue open communication with employers in the region to better determine specific software and technology needs for inclusion in the curriculum of the Administrative Assistant program.
3. The study should be replicated in a few years. Many comments suggest that this is a changing field. New technology and business and industry reorganization has resulted in changing responsibilities for the administrative

professional. The study should thus be replicated in a few years to determine the changing competencies and to keep the Administrative Assistant degree program at Chippewa Valley Technical College current.

4. The study could be replicated for all Administrative Assistant degree programs within the Wisconsin Technical College System. The competencies and software and technology needs of administrative professionals may vary based on demographics within the state of Wisconsin. The study should thus be replicated statewide to determine the changing competencies and to keep all Administrative Assistant degree programs within the Wisconsin Technical College System current.
5. If the study were replicated again, more specific directions and an expanded rating scale would be needed for the survey section on future trends. The results of this study were confounding because the response category of expected future performance was outside the range of the response scale. A separate scale would allow for improved analysis in predicting future trends.

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APPENDIX A

## Business Technology Department Advisory Committee Members

<u>Name</u>	<u>Company</u>	<u>Position</u>
<u>Administrative Assistant and Office Assistant Programs</u>		
Linda Bockin	Phillips Plastics Corp	
Heidi Derby (Chair)		
Jack Hoggatt	School of Business	
Becky Iverson	Kelly Temporary Svcs	
Perry Kuznar	LPI	Marketing Manager
Sally Lane	Nestle Food Co.	
Barbara Michels	Weld, Riley, Prenn & Ricci	
Marge Quaid	Consumer Protection Bureau WI Dept of Agriculture, Trade, & Consumer Protection	Regional Manager
Lori Rude	Meds PDN	
Angie Seichter	Department of Human Services Eau Claire County Courthouse	
Dick Smith	Menomonie High School	
Mary Spies	Board of Education	Personnel Assistant
Jean Wysocky	Chippewa Falls High School	
<u>Medical Office Specialist Program</u>		
Lori Eslinger		
Tammy LeBakken	Dr. S. A. Obaid	Medical Administrative Assistant
Jackie Leverty	Certified Recovery	System Administrator
Pam Mikow	Midelfort Clinic	Health Info Management
Linda Nelson	Certified Recovery	President
Sue Peck, PhD, RN	UWEC	
Kandi Podrovitz	Memorial Medical Center	
Connie Rindal	Midelfort Clinic	Transcriptionist Coordinator
Sally Rindal	Anderson McMahan Chiropractic Clinic	Office Manager
Denise Schultz	Blue Cross/Blue Shield	Coding Specialist
Patricia Schultz	Western Wisconsin, S.C.	Clinic Administrator
Kathy Strasburg	Augusta Family Medicine Clinic	

APPENDIX B

## Pilot Survey Instrument

**Chippewa Valley Technical College**  
**“An Equal Opportunity Employer and Educator”**  
**Administrative Professional Competency Survey**

I understand that by returning this questionnaire, I am giving informed consent as a participating volunteer in this study. I understand that the purpose of this study is to investigate competencies of administrative professionals in West Central Wisconsin and agree that any potential risks are exceedingly small. I also understand the potential benefits that might be realized from the successful completion of this study. I am aware that the information is being sought in a specific manner so that no identifiers are needed and so that confidentiality is guaranteed. I realize that I have the right to refuse to participate and that my right to withdraw from participation at any time during the study will be respected with no coercion or prejudice. NOTE: Questions or concerns about participation in the research or subsequent complaints should be addressed first to the researcher or research advisor and second to Dr. Ted Knous, Chair, UW-Stout Institutional Review Board for the Protection of Human Subjects in Research, 11 Hill, UW- Stout, Menomonie, WI, 54751, phone (715) 232-1126.

Your responses will be kept strictly confidential. Only the primary researcher or her designee will have access to the confidential raw data.

What is the title of your position? (be specific) \_\_\_\_\_

If you could change your job title, what title would you recommend? \_\_\_\_\_

Circle the type of business you work for:      Service              Manufacturing              Government              Other

How many employees in your organization?    1-10                      11-20                      21-50                      50+

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
<b>Organizing And Planning Functions</b>						
O1. Prepare Agendas.....	1	2	3	4	5	6
O2. Compile materials for meetings.....	1	2	3	4	5	6
O3. Plan physical layout of the office.....	1	2	3	4	5	6
O4. Plan and organize own work.....	1	2	3	4	5	6
O5. Log work in and out.....	1	2	3	4	5	6
O6. Gather information for supervisor.....	1	2	3	4	5	6
O7. Compile data for company reports.....	1	2	3	4	5	6
O8. Maintain appointment calendar.....	1	2	3	4	5	6
O9. Arrange schedules for meetings/appointments electronically.....	1	2	3	4	5	6
O10. Make travel arrangements.....	1	2	3	4	5	6
O11. Prepare travel itineraries.....	1	2	3	4	5	6
O12. Manually schedule calendar for meeting rooms..	1	2	3	4	5	6
O13. Plan meetings or conferences.....	1	2	3	4	5	6
O14. Obtain facilities for meetings and conferences....	1	2	3	4	5	6
O15. Obtain audio-visual equipment for meetings.....	1	2	3	4	5	6
O16. Plan for entertainment, receptions, or dinners.....	1	2	3	4	5	6
Other.....	1	2	3	4	5	6
<b>Maintaining Equipment &amp; Supplies</b>						
E1. Maintain inventory of software.....	1	2	3	4	5	6
E2. Prepare cost justification for software.....	1	2	3	4	5	6
E3. Assist co-workers with software problems.....	1	2	3	4	5	6
E4. Maintain software licenses.....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
E5. Train others on equipment.....	1	2	3	4	5	6
E6. Assist co-workers with hardware problems.....	1	2	3	4	5	6
E7. Maintain inventory of office equipment and furniture.....	1	2	3	4	5	6
E8. Maintain equipment leases.....	1	2	3	4	5	6
E9. Schedule maintenance of office equipment.....	1	2	3	4	5	6
E10. Prepare cost justification for purchase of office equipment and furniture.....	1	2	3	4	5	6
E11. Evaluate/recommend equipment for purchase.....	1	2	3	4	5	6
E12. Receive office equipment and supplies.....	1	2	3	4	5	6
E13. Store office equipment and supplies.....	1	2	3	4	5	6
E14. Supervise installation of office equipment.....	1	2	3	4	5	6
E15. Order supplies.....	1	2	3	4	5	6
E16. Maintain inventory of supplies.....	1	2	3	4	5	6
E17. Maintain inventory of forms.....	1	2	3	4	5	6
E18. Perform regular maintenance of equipment.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Performing Financial Functions</b>						
F1. Process payroll.....	1	2	3	4	5	6
F2. Prepare tax withholding reports.....	1	2	3	4	5	6
F3. Process accounts payable invoice.....	1	2	3	4	5	6
F4. Approve bill for payment.....	1	2	3	4	5	6
F5. Complete vouchers for payment.....	1	2	3	4	5	6
F6. Determine budgetary requirements.....	1	2	3	4	5	6
F7. Prepare budget for administrative services.....	1	2	3	4	5	6
F8. Maintain petty cash fund.....	1	2	3	4	5	6
F9. Keep record of offices expenses.....	1	2	3	4	5	6
F10. Reconcile cash count and receipts.....	1	2	3	4	5	6
F11. Prepare bank deposits.....	1	2	3	4	5	6
F12. Reconcile bank statements.....	1	2	3	4	5	6
F13. Make journal entries.....	1	2	3	4	5	6
F14. Reconcile journal.....	1	2	3	4	5	6
F15. Complete purchase requisitions.....	1	2	3	4	5	6
F16. Prepare employer's travel voucher.....	1	2	3	4	5	6
F17. Accept payment on account.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Managing Records And Files</b>						
R1. Maintain alphabetic filing system.....	1	2	3	4	5	6
R2. Maintain subject filing system.....	1	2	3	4	5	6
R3. Maintain numeric filing system.....	1	2	3	4	5	6
R4. Maintain electronic files.....	1	2	3	4	5	6
R5. Maintain chronological file.....	1	2	3	4	5	6
R6. Maintain classified or confidential files.....	1	2	3	4	5	6
R7. Maintain file of addresses and telephone numbers.....	1	2	3	4	5	6
R8. Maintain magnetic media file.....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
R9. Develop records management system and guidelines.....	1	2	3	4	5	6
R10. Maintain supervisor's photographs and biographical data .....	1	2	3	4	5	6
R11. Process records for destruction or disposition .....	1	2	3	4	5	6
R12. Maintain disk library .....	1	2	3	4	5	6
R13. Use database for records.....	1	2	3	4	5	6
R14. Retrieve information from files .....	1	2	3	4	5	6
R15. Search for lost materials in file.....	1	2	3	4	5	6
R16. Maintaining clippings file.....	1	2	3	4	5	6
R17. Maintain tickler file .....	1	2	3	4	5	6
R18. Maintain historical records .....	1	2	3	4	5	6
R19. Maintain reference library .....	1	2	3	4	5	6
R20. File materials .....	1	2	3	4	5	6
R21. Log incoming records.....	1	2	3	4	5	6
R22. Transfer files manually/electronically .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Communications</b>						
C1. Explain office procedures.....	1	2	3	4	5	6
C2. Orient new employees .....	1	2	3	4	5	6
C3. Make oral presentations.....	1	2	3	4	5	6
C4. Compose routine correspondence.....	1	2	3	4	5	6
C5. Dictate correspondence.....	1	2	3	4	5	6
C6. Compose written directions .....	1	2	3	4	5	6
C7. Maintain telephone log .....	1	2	3	4	5	6
C8. Answer incoming calls .....	1	2	3	4	5	6
C9. Place/return telephone calls .....	1	2	3	4	5	6
C10. Greet/assist visitors and clients.....	1	2	3	4	5	6
C11. Handle confidential material.....	1	2	3	4	5	6
C12. Respond to inquiries .....	1	2	3	4	5	6
C13. Keep up-to-date with technical developments.....	1	2	3	4	5	6
C14. Develop liaisons with organizations and the community.....	1	2	3	4	5	6
C15. Participate in task forces/committees .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Using Operating Systems</b>						
OS1. Boot, access, and exit operating system.....	1	2	3	4	5	6
OS2. Execute basic PC commands .....	1	2	3	4	5	6
OS3. Create directory/subdirectory.....	1	2	3	4	5	6
OS4. Optimize hard disk space.....	1	2	3	4	5	6
OS5. Configure operating system.....	1	2	3	4	5	6
OS6. Analyze memory configurations.....	1	2	3	4	5	6
OS7. Assure backup of system .....	1	2	3	4	5	6
OS8. Restore from backup .....	1	2	3	4	5	6
OS9. Install software.....	1	2	3	4	5	6
OS10. Delete software .....	1	2	3	4	5	6
OS11. Copy one diskette to another.....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
OS12. Convert document from one system to another .	1	2	3	4	5	6
<b>Other</b>	1	2	3	4	5	6
<b>Document Production</b>						
D1. Key document from longhand .....	1	2	3	4	5	6
D2. Key document from machine transcription.....	1	2	3	4	5	6
D3. Key document from edited rough draft.....	1	2	3	4	5	6
D4. Key mailing labels and envelopes .....	1	2	3	4	5	6
D5. Key data to prepare graphs and charts.....	1	2	3	4	5	6
D6. Key manuscripts .....	1	2	3	4	5	6
D7. Key correspondence using variable inserts.....	1	2	3	4	5	6
D8. Key statistical data in documents.....	1	2	3	4	5	6
D9. Key correspondence .....	1	2	3	4	5	6
D10. Insert graphic in a document.....	1	2	3	4	5	6
D11. Design forms .....	1	2	3	4	5	6
D12. Design tables depicting data .....	1	2	3	4	5	6
D13. Complete preprinted forms .....	1	2	3	4	5	6
D14. Compose copy to be keyed .....	1	2	3	4	5	6
D15. Print data.....	1	2	3	4	5	6
D16. Paste-up materials to be printed.....	1	2	3	4	5	6
D17. Make a photocopy of document .....	1	2	3	4	5	6
D18. Scan data or graphics into a document electronically .....	1	2	3	4	5	6
D19. Obtain notarization for document .....	1	2	3	4	5	6
D20. Revise existing documents .....	1	2	3	4	5	6
D21. Manipulate text or data using software.....	1	2	3	4	5	6
D22. Search/replace data .....	1	2	3	4	5	6
D23. Spell check a document using software.....	1	2	3	4	5	6
D24. Edit a document using the Thesaurus .....	1	2	3	4	5	6
D25. Correct grammar and punctuation in document..	1	2	3	4	5	6
D26. Utilize the Help function .....	1	2	3	4	5	6
D27. Search data.....	1	2	3	4	5	6
D28. Proofread document for content, format, and typographical errors.....	1	2	3	4	5	6
D29. Create and edit a database.....	1	2	3	4	5	6
D30. Determine optimum process for reproduction of printed materials.....	1	2	3	4	5	6
D31. Merge form letters .....	1	2	3	4	5	6
D32. Create word processing directory/subdirectory index .....	1	2	3	4	5	6
D33. Design/produce visuals .....	1	2	3	4	5	6
D34. Create document using graphic software package	1	2	3	4	5	6
D35. Identify appropriate software for job.....	1	2	3	4	5	6
D36. Create new documents using word processing software .....	1	2	3	4	5	6
D37. Transcribe minutes of meetings.....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
D38. Transcribe dictation into mailable documents .....	1	2	3	4	5	6
D39. Take dictation in shorthand .....	1	2	3	4	5	6
D40. Develop a macro.....	1	2	3	4	5	6
D41. Create a template .....	1	2	3	4	5	6
D42. Take dictation at the keyboard.....	1	2	3	4	5	6
D43. Create document using spreadsheet software package.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Information Distribution</b>						
I1. Respond to electronic mail messages .....	1	2	3	4	5	6
I2. Transmit and monitor electronic mail.....	1	2	3	4	5	6
I3. Respond to voice mail .....	1	2	3	4	5	6
I4. Retrieve messages from answering machine .....	1	2	3	4	5	6
I5. Send document via modem.....	1	2	3	4	5	6
I6. Send document via fax .....	1	2	3	4	5	6
I7. Receive document via fax/modem.....	1	2	3	4	5	6
I8. Prepare packages for shipping.....	1	2	3	4	5	6
I9. Handle specialized mail.....	1	2	3	4	5	6
I10. Prepare correspondence and document for mailing.....	1	2	3	4	5	6
I11. Process incoming mail.....	1	2	3	4	5	6
I12. Process outgoing mail.....	1	2	3	4	5	6
I13. Process mail through postage machine.....	1	2	3	4	5	6
I14. Arrange for courier services .....	1	2	3	4	5	6
I15. Distribute materials.....	1	2	3	4	5	6
I16. Utilize information database.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Producing Desktop Publishing Documents</b>						
DTP1. Design a desktop published document.....	1	2	3	4	5	6
DTP2. Understand publishing design principles .....	1	2	3	4	5	6
DTP3. Prepare a paste-up for a multi-page booklet.....	1	2	3	4	5	6
DTP4. Create bulletins, flyers and announcements.....	1	2	3	4	5	6
DTP5. Create business cards .....	1	2	3	4	5	6
DTP6. Create multi-page document .....	1	2	3	4	5	6
DTP7. Create multi-column document.....	1	2	3	4	5	6
DTP8. Create brochures .....	1	2	3	4	5	6
DTP9. Create charts and graphs .....	1	2	3	4	5	6
DTP10. Create flow charts .....	1	2	3	4	5	6
DTP11. Insert scanned graphics/photos into existing page layout.....	1	2	3	4	5	6
DTP12. Import text, charts, tables and other graphics from other software programs into a desktop-published document .....	1	2	3	4	5	6
DTP13. Create and use templates .....	1	2	3	4	5	6
DTP14. Create, edit and save style sheets .....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
DTP15. Create a design/publication using clip art, boxes, shading, lines and illustrations created with drawing and paint tools.....	1	2	3	4	5	6
DTP16. Create a newsletter using headings, wrap-arounds and graphics.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Supervising Personnel</b>						
S1. Develop personnel policies.....	1	2	3	4	5	6
S2. Develop administrative services procedures manual.....	1	2	3	4	5	6
S3. Update administrative services procedures manual.....	1	2	3	4	5	6
S4. Conduct employee training.....	1	2	3	4	5	6
S5. Orient new employee.....	1	2	3	4	5	6
S6. Explain office procedures.....	1	2	3	4	5	6
S7. Interview applicant for employment.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other Skills</b>						
Z1. Demonstrate office ethics.....	1	2	3	4	5	6
Z2. Demonstrate behaviors appropriate to business or industry.....	1	2	3	4	5	6
Z3. Assist in achieving goals set by employing organization.....	1	2	3	4	5	6
Z4. Participate in professional development activities.....	1	2	3	4	5	6
Z5. Communicate with international and culturally diverse audiences.....	1	2	3	4	5	6
Z6. Use voice recognition software to input data.....	1	2	3	4	5	6
Z7. Use a computer pen to input data.....	1	2	3	4	5	6
Z8. Use a personal digital assistant (PDA).....	1	2	3	4	5	6
Z9. Use a digital camera to add graphics to documents and/or Web pages.....	1	2	3	4	5	6
Z10. Set up or attend meetings using a meeting software.....	1	2	3	4	5	6
Z11. Use a business decision software.....	1	2	3	4	5	6
Z12. Use an electronic whiteboard to upload handwritten notes to a computer.....	1	2	3	4	5	6
Z13. Use a project management software to organize company projects.....	1	2	3	4	5	6
Z14. Design forms using forms software.....	1	2	3	4	5	6
Z15. Conduct Internet research to make travel arrangements.....	1	2	3	4	5	6
Z16. Conduct Internet research to make equipment decisions and purchases.....	1	2	3	4	5	6
Z17. Conduct Internet research for topics relating to the business such as competition, suppliers, marketing, etc.....	1	2	3	4	5	6
Z18. Apply Web design principles.....	1	2	3	4	5	6
Z19. Use HTML to update Web pages.....	1	2	3	4	5	6

	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
Z20. Update Web pages .....	1	2	3	4	5	6
Z21. Design Web pages.....	1	2	3	4	5	6
Z22. Create graphics or Web objects using a graphic design software .....	1	2	3	4	5	6
Z23. Apply intellectual property laws in digital environments.....	1	2	3	4	5	6
Z24. Apply e-commerce principles for conducting business online .....	1	2	3	4	5	6
Z25. Apply multimedia design principles .....	1	2	3	4	5	6
Z26. Develop multimedia components.....	1	2	3	4	5	6
Z27. Combine multimedia components in digital environments.....	1	2	3	4	5	6
Z28. Integrate software applications .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6

**Thank you for your cooperation!**  
**Please return this completed survey in the envelope provided by April 20, 2001.**

APPENDIX C

### Prenotice Postcard

A few days from now you will receive in the mail a request to fill out a questionnaire for an important research project I am conducting for the Administrative Assistant program at Chippewa Valley Technical College.

It concerns what competencies administrative professionals are currently performing in their jobs, expected future job responsibilities, and job titling. The study is an important one that will help the Business Technology Department update its Administrative Assistant program and business course content.

With your help, this research can be successful.

Julianne K. Hastings Taylor  
Instructor, Business Technology Department  
Chippewa Valley Technical College

APPENDIX D

## Survey Letter

April 5, 2001

Dear :

I am an instructor in the Business Technology Department at Chippewa Valley Technical College in Eau Claire. Related to the mission statement of Chippewa Valley Technical College, the Business Technology Department is attempting to deliver superior, progressive technical education, which improves the lives of students, meets the workforce needs of the region, and strengthens the larger community. In an effort to update the curriculum in the Administrative Assistant program, I am asking your help in completing the enclosed survey.

It is my understanding that, in the past, you have been involved with conferences and seminars in Eau Claire or Menomonie during Administrative Professionals Week in April. I am contacting administrative professionals to gain information about the job tasks they are currently performing and their knowledge about taking on additional responsibilities or learning new technologies in the future.

Results from the survey will be used by the Business Technology Department to update the Administrative Assistant program. The information gathered is critical to support the development of progressive, new curriculum and program changes. By understanding what job tasks are being performed and what business technology is being used, the department can budget for updated and additional equipment purchases to aid instructors in delivering courses and in order to maximize the potential for relevant student learning. This study will also address the concern among individuals in the clerical profession and instructors in this area about removing the stereotype of "secretary" and justifying a program title change.

Your answers are completely confidential and will be released only as summaries in which no individual's answers can be identified. Identifying numbers on the survey are merely used to indicate who has responded for follow-up purposes. If you receive a duplicate survey in error, please return the blank questionnaire indicating that fact. The survey is voluntary. However, you can help me very much by taking a few minutes to share your experiences about your job. If for some reason you prefer not to respond, please let me know by returning the blank questionnaire in the enclosed business reply envelope.

Please return the survey to me in the enclosed envelope by April 18, 2001. The results of the survey will help us make positive, progressive, and relevant program changes at Chippewa Valley Technical College.

Thank you very much for helping with this important study. If you would like to be notified about the results of this research, send an email to [julitaylor@chippewa.tec.wi.us](mailto:julitaylor@chippewa.tec.wi.us).

Sincerely,

Julianne K. Hastings Taylor  
Instructor, Business Technology Department

Enclosures

APPENDIX E

## Survey Letter With Token

April 5, 2001

Dear :

I am an instructor in the Business Technology Department at Chippewa Valley Technical College in Eau Claire. Related to the mission statement of Chippewa Valley Technical College, the Business Technology Department is attempting to deliver superior, progressive technical education, which improves the lives of students, meets the workforce needs of the region, and strengthens the larger community. In an effort to update the curriculum in the Administrative Assistant program, I am asking your help in completing the enclosed survey.

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I have enclosed a small token of appreciation as a way of saying thanks for your help.

Please return the survey to me in the enclosed envelope by April 18, 2001. The results of the survey will help us make positive, progressive, and relevant program changes at Chippewa Valley Technical College.

Thank you very much for helping with this important study. If you would like to be notified about the results of this research, send an email to [julitaylor@chippewa.tec.wi.us](mailto:julitaylor@chippewa.tec.wi.us).

Sincerely,

Julianne K. Hastings Taylor  
Instructor, Business Technology Department

Enclosures

APPENDIX F

## UW-Stout Survey Letter

April 5, 2001

Dear Administrative Professional:

I am an instructor in the Business Technology Department at Chippewa Valley Technical College in Eau Claire. Related to the mission statement of Chippewa Valley Technical College, the Business Technology Department is attempting to deliver superior, progressive technical education, which improves the lives of students, meets the workforce needs of the region, and strengthens the larger community. In an effort to update the curriculum in the Administrative Assistant program, I am asking your help in completing the enclosed survey.

It is my understanding that, in the past, you have been involved with conferences and seminars in Eau Claire or Menomonie during Administrative Professionals Week in April. I am contacting administrative professionals to gain information about the job tasks they are currently performing and their knowledge about taking on additional responsibilities or learning new technologies in the future. If you are not currently employed as an administrative professional, please forward this survey to the administrative professional within your organization.

Results from the survey will be used by the Business Technology Department to update the Administrative Assistant program. The information gathered is critical to support the development of progressive, new curriculum and program changes. By understanding what job tasks are being performed and what business technology is being used, the department can budget for updated and additional equipment purchases to aid instructors in delivering courses and in order to maximize the potential for relevant student learning. This study will also address the concern among individuals in the clerical profession and instructors in this area about removing the stereotype of “secretary” and justifying a program title change.

Your answers are completely confidential and will be released only as summaries in which no individual’s answers can be identified. Identifying numbers on the survey are merely used to indicate who has responded for follow-up purposes. If you receive a duplicate survey in error, please return the blank questionnaire indicating that fact. If you need additional questionnaires for other administrative professionals within your organization, contact me by email so that I can send you more. The survey is voluntary. However, you can help me very much by taking a few minutes to share your experiences about your job. If for some reason you prefer not to respond, please let me know by returning the blank questionnaire in the enclosed business reply envelope.

Please return the survey to me in the enclosed envelope by April 18, 2001. The results of the survey will help us make positive, progressive, and relevant program changes at Chippewa Valley Technical College.

Thank you very much for helping with this important study. If you would like to be notified about the results of this research, send an email to [julitaylor@chippewa.tec.wi.us](mailto:julitaylor@chippewa.tec.wi.us).

Sincerely,

Julianne K. Hastings Taylor  
Instructor, Business Technology Department

Enclosures

APPENDIX G

## UW-Stout Survey Letter with Token

April 5, 2001

Dear Administrative Professional:

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It is my understanding that, in the past, you have been involved with conferences and seminars in Eau Claire or Menomonie during Administrative Professionals Week in April. I am contacting administrative professionals to gain information about the job tasks they are currently performing and their knowledge about taking on additional responsibilities or learning new technologies in the future. If you are not currently employed as an administrative professional, please forward this survey to the administrative professional within your organization.

Results from the survey will be used by the Business Technology Department to update the Administrative Assistant program. The information gathered is critical to support the development of progressive, new curriculum and program changes. By understanding what job tasks are being performed and what business technology is being used, the department can budget for updated and additional equipment purchases to aid instructors in delivering courses and in order to maximize the potential for relevant student learning. This study will also address the concern among individuals in the clerical profession and instructors in this area about removing the stereotype of “secretary” and justifying a program title change.

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Please return the survey to me in the enclosed envelope by April 18, 2001. The results of the survey will help us make positive, progressive, and relevant program changes at Chippewa Valley Technical College.

Thank you very much for helping with this important study. If you would like to be notified about the results of this research, send an email to [julitaylor@chippewa.tec.wi.us](mailto:julitaylor@chippewa.tec.wi.us).

Sincerely,

Julianne K. Hastings Taylor  
Instructor, Business Technology Department  
Enclosures

APPENDIX H

## Token Phone Card

**HOW TO USE YOUR PHONE CARD**

1. Dial **1-800-699-5196**
2. At the prompt, enter **PIN #:**
3. At the prompt dial **1 + the area code and telephone number**
4. For **International calls:** Enter **011 + country code + area code and telephone number**

For **Customer Service** call: **1-800-821-0925**

Card expires one year from date of first use.

A surcharge may be assessed if used from a pay phone.

Cards printed by [customphonecard.com](http://customphonecard.com) 888-249-4116

Network services provided by Linq Telecom Inc.

APPENDIX I

## Survey Instrument



**Chippewa Valley Technical College**  
**“An Equal Opportunity Employer and Educator”**  
**Business Technology Department**  
**Administrative Professional Competency Survey**  
 (Not including specialized areas of legal and medical)

**Do not throw away this survey!**

The purpose of this survey is to gain information about the job tasks you are currently performing as an administrative professional and your expectation of taking on additional responsibilities or learning new technologies in the future. Please take a few minutes now to answer the questions contained in this packet. Answer completely and honestly to the best of your ability according to the frequency you perform each job task or your expectation of future performance. Blank lines have been included after each category for you to add competencies that are not already listed. Upon completion, refold the questionnaire and return it in the envelope provided as soon as possible.

I understand that by returning this questionnaire, I am giving informed consent as a participating volunteer in this study. I understand that the purpose of this study is to investigate competencies of administrative professionals in West Central Wisconsin and agree that any potential risks are exceedingly small. I also understand the potential benefits that might be realized from the successful completion of this study. I am aware that the information is being sought in a specific manner so that no identifiers are needed and so that confidentiality is guaranteed. I realize that I have the right to refuse to participate and that my right to withdraw from participation at any time during the study will be respected with no coercion or prejudice. NOTE: Questions or concerns about participation in the research or subsequent complaints should be addressed first to the researcher or research advisor and second to Dr. Ted Knous, Chair, UW-Stout Institutional Review Board for the Protection of Human Subjects in Research, 11 HH, UW-Stout, Menomonie, WI, 54751, phone (715) 232-1126.

Your responses will be kept strictly confidential. Only the primary researcher or her designee will have access to the confidential raw data.

Thank you for help with this important research.

What is the title of your position? (be specific) \_\_\_\_\_

If you could change your job title, what title would you recommend? \_\_\_\_\_

Circle the type of business that best describes the company you work for:

Goods Producing	Service	Construction	Manufacturing	Transportation
Wholesale Trade	Retail Trade	Finance/Insurance/Real Estate	Government	

How many employees in your organization?    1-10                      11-20                      21-50                      50+

How many administrative professionals in your organization?    1-2                      3-5                      6-9                      10+

Are you a member of the International Association for Administrative Professionals?    Yes                      No

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
<b>Organizing And Planning Functions</b>						
O1. Prepare Agendas.....	1	2	3	4	5	6
O2. Compile materials for meetings.....	1	2	3	4	5	6
O3. Plan physical layout of the office.....	1	2	3	4	5	6
O4. Plan and organize own work.....	1	2	3	4	5	6
O5. Log work in and out.....	1	2	3	4	5	6
O6. Gather information for supervisor.....	1	2	3	4	5	6
O7. Compile data for company reports.....	1	2	3	4	5	6
O8. Maintain electronic calendars.....	1	2	3	4	5	6
O9. Make travel arrangements.....	1	2	3	4	5	6
O10. Prepare travel itineraries.....	1	2	3	4	5	6
O11. Maintain calendar for meeting rooms.....	1	2	3	4	5	6
O12. Plan meetings or conferences.....	1	2	3	4	5	6
O13. Obtain facilities for meetings and conferences.....	1	2	3	4	5	6
O14. Obtain audio-visual equipment for meetings.....	1	2	3	4	5	6
O15. Plan for entertainment, receptions, or dinners.....	1	2	3	4	5	6
<b>Other</b>	1	2	3	4	5	6
<b>Maintaining Equipment &amp; Supplies</b>						
E1. Maintain inventory of software.....	1	2	3	4	5	6
E2. Prepare cost justification for software.....	1	2	3	4	5	6
E3. Assist co-workers with software problems.....	1	2	3	4	5	6
E4. Maintain software licenses.....	1	2	3	4	5	6
E5. Train others on equipment.....	1	2	3	4	5	6
E6. Assist co-workers with hardware problems.....	1	2	3	4	5	6
E7. Maintain inventory of office equipment and furniture.....	1	2	3	4	5	6
E8. Maintain equipment leases.....	1	2	3	4	5	6
E9. Schedule maintenance of office equipment.....	1	2	3	4	5	6
E10. Prepare cost justification for purchase of office equipment and furniture.....	1	2	3	4	5	6
E11. Evaluate/recommend equipment for purchase.....	1	2	3	4	5	6
E12. Receive office equipment and supplies.....	1	2	3	4	5	6
E13. Store office equipment and supplies.....	1	2	3	4	5	6
E14. Supervise installation of office equipment.....	1	2	3	4	5	6
E15. Order supplies.....	1	2	3	4	5	6
E16. Maintain inventory of supplies.....	1	2	3	4	5	6
E17. Maintain inventory of forms.....	1	2	3	4	5	6
E18. Perform regular maintenance of equipment.....	1	2	3	4	5	6
<b>Other</b>	1	2	3	4	5	6
<b>Performing Financial Functions</b>						
F1. Process payroll.....	1	2	3	4	5	6
F2. Prepare tax withholding reports.....	1	2	3	4	5	6
F3. Process accounts payable invoice.....	1	2	3	4	5	6
F4. Approve bill for payment.....	1	2	3	4	5	6
F5. Complete vouchers for payment.....	1	2	3	4	5	6
F6. Determine budgetary requirements.....	1	2	3	4	5	6

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
F7. Prepare budget for administrative services.....	1	2	3	4	5	6
F8. Maintain petty cash fund .....	1	2	3	4	5	6
F9. Keep record of offices expenses .....	1	2	3	4	5	6
F10. Reconcile cash count and receipts .....	1	2	3	4	5	6
F11. Prepare bank deposits .....	1	2	3	4	5	6
F12. Reconcile bank statements.....	1	2	3	4	5	6
<b>F13. Make journal entries .....</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
F14. Reconcile journal.....	1	2	3	4	5	6
F15. Complete purchase requisitions .....	1	2	3	4	5	6
F16. Prepare employer's travel voucher.....	1	2	3	4	5	6
F17. Accept payment on account.....	1	2	3	4	5	6
F18. Use an accounting software package.....	1	2	3	4	5	6
<b>Other</b> .....	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
<b>Managing Records And Files</b>						
R1. Maintain alphabetic filing system.....	1	2	3	4	5	6
R2. Maintain subject filing system.....	1	2	3	4	5	6
R3. Maintain electronic files .....	1	2	3	4	5	6
R4. Maintain chronological file.....	1	2	3	4	5	6
R5. Maintain classified or confidential files.....	1	2	3	4	5	6
R6. Maintain file of addresses and telephone numbers .....	1	2	3	4	5	6
R7. Maintain magnetic media file .....	1	2	3	4	5	6
R8. Develop records management system and guidelines.....	1	2	3	4	5	6
R9. Maintain photographs and biographical data of employees .....	1	2	3	4	5	6
R10. Process records for destruction or disposition .....	1	2	3	4	5	6
R11. Maintain disk or CD library.....	1	2	3	4	5	6
R12. Use electronic database .....	1	2	3	4	5	6
R13. Retrieve information from files .....	1	2	3	4	5	6
R14. Search for lost materials in file.....	1	2	3	4	5	6
R15. Maintain tickler file .....	1	2	3	4	5	6
R16. Maintain historical records .....	1	2	3	4	5	6
R17. Maintain reference library .....	1	2	3	4	5	6
R18. File materials .....	1	2	3	4	5	6
R19. Log incoming records.....	1	2	3	4	5	6
R20. Transfer files manually/electronically .....	1	2	3	4	5	6
<b>Other</b> .....	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>
<b>Communications</b>						
C1. Explain office procedures.....	1	2	3	4	5	6
C2. Orient new employees .....	1	2	3	4	5	6
C3. Make oral presentations.....	1	2	3	4	5	6
C4. Compose routine correspondence.....	1	2	3	4	5	6
C5. Dictate correspondence.....	1	2	3	4	5	6
C6. Compose written directions .....	1	2	3	4	5	6
C7. Maintain telephone log .....	1	2	3	4	5	6
C8. Answer incoming calls .....	1	2	3	4	5	6

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
C9. Place/return telephone calls.....	1	2	3	4	5	6
C10. Greet/assist visitors and clients.....	1	2	3	4	5	6
C11. Maintain positive customer relations.....	1	2	3	4	5	6
C12. Handle confidential material.....	1	2	3	4	5	6
C13. Respond to inquiries.....	1	2	3	4	5	6
C14. Keep up-to-date with technical developments.....	1	2	3	4	5	6
C15. Develop liaisons with organizations and the community.....	1	2	3	4	5	6
C16. Participate in task forces/committees.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Using Operating Systems</b>						
OS1. Boot, access, and exit operating system.....	1	2	3	4	5	6
OS2. Execute basic PC commands.....	1	2	3	4	5	6
OS3. Create directory/subdirectory.....	1	2	3	4	5	6
OS4. Optimize hard disk space.....	1	2	3	4	5	6
OS5. Configure operating system.....	1	2	3	4	5	6
OS6. Analyze memory configurations.....	1	2	3	4	5	6
OS7. Assure backup of system.....	1	2	3	4	5	6
OS8. Restore from backup.....	1	2	3	4	5	6
OS9. Install software.....	1	2	3	4	5	6
OS10. Delete software.....	1	2	3	4	5	6
OS11. Copy one diskette to another.....	1	2	3	4	5	6
OS12. Convert document from one system to another.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Document Production</b>						
D1. Key document from longhand.....	1	2	3	4	5	6
D2. Key document from machine transcription.....	1	2	3	4	5	6
D3. Key document from edited rough draft.....	1	2	3	4	5	6
D4. Key mailing labels and envelopes.....	1	2	3	4	5	6
D5. Key data to prepare graphs and charts.....	1	2	3	4	5	6
D6. Key manuscripts.....	1	2	3	4	5	6
D7. Key correspondence using variable inserts.....	1	2	3	4	5	6
D8. Key statistical data in documents.....	1	2	3	4	5	6
D9. Key correspondence.....	1	2	3	4	5	6
D10. Insert graphic in a document.....	1	2	3	4	5	6
D11. Design forms.....	1	2	3	4	5	6
D12. Design tables depicting data.....	1	2	3	4	5	6
D13. Complete preprinted forms.....	1	2	3	4	5	6
D14. Compose copy to be keyed.....	1	2	3	4	5	6
D15. Print data.....	1	2	3	4	5	6
D16. Paste-up materials to be printed.....	1	2	3	4	5	6
D17. Make a photocopy of document.....	1	2	3	4	5	6
D18. Scan data or graphics into a document electronically.....	1	2	3	4	5	6
D19. Obtain notarization for document.....	1	2	3	4	5	6
D20. Revise existing documents.....	1	2	3	4	5	6

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
D21. Manipulate text or data using software.....	1	2	3	4	5	6
D22. Use Search/Replace feature.....	1	2	3	4	5	6
D23. Spell check a document using software.....	1	2	3	4	5	6
D24. Edit a document using the Thesaurus.....	1	2	3	4	5	6
D25. Correct grammar and punctuation in document..	1	2	3	4	5	6
D26. Utilize the Help function.....	1	2	3	4	5	6
D27. Search data.....	1	2	3	4	5	6
D28. Proofread document for content, format, and typographical errors.....	1	2	3	4	5	6
D29. Create and edit a database.....	1	2	3	4	5	6
D30. Determine optimum process for reproduction of printed materials.....	1	2	3	4	5	6
D31. Merge form letters.....	1	2	3	4	5	6
D32. Create word processing directory/subdirectory index.....	1	2	3	4	5	6
D33. Design/produce visuals.....	1	2	3	4	5	6
D34. Identify appropriate software for job.....	1	2	3	4	5	6
D35. Create new documents using word processing software.....	1	2	3	4	5	6
D36. Transcribe or record minutes of meetings.....	1	2	3	4	5	6
D37. Transcribe dictation into mailable documents.....	1	2	3	4	5	6
D38. Take dictation in shorthand.....	1	2	3	4	5	6
D39. Develop a macro.....	1	2	3	4	5	6
D40. Create a template.....	1	2	3	4	5	6
D41. Take dictation at the keyboard.....	1	2	3	4	5	6
D42. Create document using spreadsheet software package.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Information Distribution</b>						
I1. Respond to electronic mail messages.....	1	2	3	4	5	6
I2. Transmit and monitor electronic mail.....	1	2	3	4	5	6
I3. Respond to voice mail.....	1	2	3	4	5	6
I4. Retrieve messages from answering machine.....	1	2	3	4	5	6
I5. Send document via modem.....	1	2	3	4	5	6
I6. Send document via fax.....	1	2	3	4	5	6
I7. Receive document via fax/modem.....	1	2	3	4	5	6
I8. Prepare packages for shipping.....	1	2	3	4	5	6
I9. Handle specialized incoming mail.....	1	2	3	4	5	6
I10. Prepare correspondence and document for mailing.....	1	2	3	4	5	6
I11. Process incoming mail.....	1	2	3	4	5	6
I12. Process outgoing mail.....	1	2	3	4	5	6
I13. Arrange for courier services.....	1	2	3	4	5	6
I14. Distribute materials.....	1	2	3	4	5	6
I15. Utilize information database.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
<b>Producing Desktop Publishing Documents</b>						
DTP1. Design a desktop published document .....	1	2	3	4	5	6
DTP2. Understand publishing design principles .....	1	2	3	4	5	6
DTP3. Prepare a paste-up for a multi-page booklet.....	1	2	3	4	5	6
DTP4. Create bulletins, flyers and announcements .....	1	2	3	4	5	6
DTP5. Create business cards .....	1	2	3	4	5	6
DTP6. Create multi-page document .....	1	2	3	4	5	6
DTP7. Create multi-column document .....	1	2	3	4	5	6
DTP8. Create brochures .....	1	2	3	4	5	6
DTP9. Create charts and graphs .....	1	2	3	4	5	6
DTP10. Create flow charts .....	1	2	3	4	5	6
DTP11. Insert scanned graphics/photos into existing page layout.....	1	2	3	4	5	6
DTP12. Import text, charts, tables and other graphics from other software programs into a desktop-published document .....	1	2	3	4	5	6
DTP13. Create and use templates .....	1	2	3	4	5	6
DTP14. Create, edit and save style sheets .....	1	2	3	4	5	6
DTP15. Create a design/publication using clip art, boxes, shading, lines and illustrations created with drawing and paint tools .....	1	2	3	4	5	6
DTP16. Create a newsletter using headings, wrap-arounds and graphics.....	1	2	3	4	5	6
DTP17. Prepare publications for commercial printing..	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Supervising Personnel</b>						
S1. Develop personnel policies .....	1	2	3	4	5	6
S2. Develop administrative services procedures manual .....	1	2	3	4	5	6
S3. Update administrative services procedures manual .....	1	2	3	4	5	6
S4. Conduct employee training .....	1	2	3	4	5	6
S5. Orient new employee.....	1	2	3	4	5	6
S6. Explain office procedures .....	1	2	3	4	5	6
S7. Develop applicant interview questions .....	1	2	3	4	5	6
S8. Interview applicant for employment.....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other Skills</b>						
Z1. Demonstrate business ethics .....	1	2	3	4	5	6
Z2. Demonstrate behaviors appropriate to business or industry .....	1	2	3	4	5	6
Z3. Assist in achieving goals set by employing organization .....	1	2	3	4	5	6
Z4. Participate in professional development activities	1	2	3	4	5	6
Z5. Communicate with international and culturally diverse audiences .....	1	2	3	4	5	6

Category / Job Competency	Never	Rarely	Monthly	Weekly	Daily	Will perform within the next 1-2 years
<b>Business Technology</b>						
Z6. Use voice recognition software to input data.....	1	2	3	4	5	6
Z7. Use a computer pen to input data.....	1	2	3	4	5	6
Z8. Use a personal digital assistant (PDA).....	1	2	3	4	5	6
Z9. Use a digital camera to add graphics to documents and/or Web pages .....	1	2	3	4	5	6
Z10. Set up or attend meetings using a meeting software.....	1	2	3	4	5	6
Z11. Use a business decision software .....	1	2	3	4	5	6
Z12. Use an electronic whiteboard to upload handwritten notes to a computer .....	1	2	3	4	5	6
Z13. Use a project management software to organize company projects .....	1	2	3	4	5	6
Z14. Design forms using forms software .....	1	2	3	4	5	6
Z15. Conduct Internet research .....	1	2	3	4	5	6
Z16. Apply Web design principles.....	1	2	3	4	5	6
Z17. Use HTML to update Web pages.....	1	2	3	4	5	6
Z18. Update Web pages .....	1	2	3	4	5	6
Z19. Design Web pages.....	1	2	3	4	5	6
Z20. Use XML to create Web pages .....	1	2	3	4	5	6
Z21. Use XML to update/maintain Web pages .....	1	2	3	4	5	6
Z22. Create graphics or Web objects using a graphic design software .....	1	2	3	4	5	6
Z23. Apply intellectual property laws in digital environments (Copyright).....	1	2	3	4	5	6
Z24. Apply data security principles.....	1	2	3	4	5	6
Z25. Apply e-commerce principles for conducting business online .....	1	2	3	4	5	6
Z26. Apply multimedia design principles .....	1	2	3	4	5	6
Z27. Develop multimedia components.....	1	2	3	4	5	6
Z28. Combine multimedia components in digital environments.....	1	2	3	4	5	6
Z29. Use a CD-RW (read/write drive) .....	1	2	3	4	5	6
Z30. Apply workplace ergonomic principles .....	1	2	3	4	5	6
Z31. Integrate software applications .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6
<b>Other</b> .....	1	2	3	4	5	6

**Thank you for your cooperation!**  
**Please return this completed survey in the envelope provided by April 18, 2001.**

APPENDIX J

### Follow-Up Postcard

Last week a questionnaire about job competencies performed by administrative professionals was mailed to you. You were selected to participate because of your previous involvement with conferences and seminars in this area during Administrative Professionals Week.

If you have already completed and returned the questionnaire, please accept my sincere thanks. If not, please do so today. I am especially grateful for your help because it is by asking professionals like you to share your experiences that the Business Technology Department can update its Administrative Assistant program and course content.

If you did not receive a questionnaire, or if it was misplaced, please call 1-800-547-2882, x6392 and another one will be mailed to you today.

Julianne K. Hastings Taylor  
Instructor, Business Technology Department  
Chippewa Valley Technical College

APPENDIX K

## Follow-Up Letter EC Seminar 2000 Non-Respondents

April 27, 2001

Dear :

A couple of weeks ago I sent a questionnaire to you that asked about job tasks you perform as an administrative professional. To the best of my knowledge, it has not yet been returned.

The information gathered from people who have already responded includes an interesting variety of job competencies. The results are going to be very useful to the Business Technology Department at Chippewa Valley Technical College as well as other Administrative Assistant programs within the Wisconsin Technical College System. The results of the survey will help Chippewa Valley Technical College make positive, progressive, and relevant program changes to its Administrative Assistant program.

I am writing again because of the importance that your questionnaire has for helping to get accurate results. Although I sent questionnaires to several administrative professionals in the area, it's only by hearing from nearly everyone in the sample that I can be sure that the results are truly representative.

A few people have responded by saying they received a duplicate survey in error or because they prefer not to respond. If either of these concerns applies to you, please let me know by returning the blank questionnaire and indicating the reason for its return.

If you are concerned about survey procedures, your answers are completely confidential and will be released only as summaries in which no individual's answers can be identified. Identifying numbers on the survey are merely used to indicate who has responded for follow-up purposes.

I hope that you will fill out and return the questionnaire today.

Julianne K. Hastings Taylor  
Instructor, Business Technology Department  
Chippewa Valley Technical College  
620 West Clairemont Avenue  
Eau Claire, WI 54701

Enclosure

APPENDIX L

## Other Job Titles

## Question 1

Account Clerk (all levels)	LPN
Accountant	Manager or General Manager
Accounting Assistant	Medical Secretary
Accounting Clerk	Medical Transcriptionist
Administrative Coordinator	Office Administrator
Administrative Program Technician	Office Assistant
Administrative Secretary	Office Associate
Administrative Support	Office Manager
Appointment Coordinator	Optometric Assistant
Assistant to Principal	Optometric Technician
Bookkeeper	Orientation and Events Coordinator
Campus Assistant	Owner/Graphic Designer
CEO / CFO	Payroll and Benefits Administrator
Clerical Support	Payroll and Benefits Specialist
Corporate Office Director	Personnel Assistant
Customer Service Representative	Personnel Specialist
Deputy Clerk – Treasurer	President’s Secretary
Director	Production and Sales Management
District Media Cataloger	Program Coordinator
Division Administrator	Program Support
Events and Tourism Coordinator	Project Assistant
Executive Assistant	Purchasing Technician
Executive Secretary	Recruitment Coordinator
Financial Service Representative	Registrar Technician
Financial Specialist	Rehabilitation Secretary
Fiscal Clerk II	Rehabilitation Services Clerk
Front Office Associate	Resource Specialist
General Services Secretary	Special Needs Assistant
Health Unit Coordinator	Specialist
Human Resources Administrative Coordinator	Support Services Manager
Law Enforcement Support Assistant	Support Staff
Lead Program Support	Teacher Aide
Legal Secretary	Unit Coordinator
Library Services Assistant – Advanced	Word Processing Operator
	Word Processing Technician