

# Course Outline

Business and Finance

REVISED: August/2020

**Job Title**

Administrative Assistant

**Career Pathway:**

Business Management

**Industry Sector:**

Business and Finance

**O\*NET-SOC CODE:**

43-6014.00

**CBEDS Title:**

Business Communications

**CBEDS No.:**

4623

**75-35-50**

**Administrative Assistant/1:  
Office Procedures**

**Credits:** 5

**Hours:** 90

**Course Description:**

This competency-based course is the first in a sequence of three designed for administrative assistant training. It provides students with technical instruction and practical experience in office procedures. It includes an orientation, workplace safety procedures, resource management, business ethics and attitudes, and employability skills. Emphasis is placed on the proper use of office tools and equipment including electronic calculating machines and reprographic equipment, telephone etiquette, email and mail processing, data and records management, the appropriate use of reference materials, and travel arrangements. The competencies in this course are aligned with the California High School Academic Content Standards and the California Career Technical Education Model Curriculum Standards.

**Prerequisites:**

None.

**NOTE:** For Perkins purposes this course has been designated as a **concentrator** course.

This course cannot be repeated once a student receives a Certificate of Completion.



## **COURSE OUTLINE COMPETENCY-BASED COMPONENTS**

A course outline reflects the essential intent and content of the course described. Acceptable course outlines have six components. (Education Code Section 52506). Course outlines for all apportionment classes, including those in jails, state hospitals, and convalescent hospitals, contain the six required elements:

(EC 52504; 5CCR 10508 [b]; Adult Education Handbook for California [1977], Section 100)

### **COURSE OUTLINE COMPONENTS**

### **LOCATION**

#### **GOALS AND PURPOSES**

Cover

The educational goals or purposes of every course are clearly stated and the class periods are devoted to instruction. The course should be broad enough in scope and should have sufficient educational worth to justify the expenditure of public funds.

The goals and purpose of a course are stated in the COURSE DESCRIPTION. Course descriptions state the major emphasis and content of a course, and are written to be understandable by a prospective student.

#### **PERFORMANCE OBJECTIVES OR COMPETENCIES**

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Objectives should be delineated and described in terms of measurable results for the student and include the possible ways in which the objectives contribute to the student's acquisition of skills and competencies.

Performance Objectives are sequentially listed in the COMPETENCY-BASED COMPONENTS section of the course outline. Competency Areas are units of instruction based on related competencies. Competency Statements are competency area goals that together define the framework and purpose of a course. Competencies fall on a continuum between goals and performance objectives and denote the outcome of instruction.

Competency-based instruction tells a student before instruction what skills or knowledge they will demonstrate after instruction. Competency-based education provides instruction which enables each student to attain individual goals as measured against pre-stated standards.

Competency-based instruction provides immediate and continual repetition and in competency-based education the curriculum, instruction, and assessment share common characteristics based on clearly stated competencies. Curriculum, instruction and assessment in competency-based education are: explicit, known, agreed upon, integrated, performance oriented, and adaptive.

**COURSE OUTLINE COMPETENCY-BASED COMPONENTS**  
**(continued)**

**COURSE OUTLINE COMPONENTS**

**LOCATION**

**INSTRUCTIONAL STRATEGIES**

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Instructional techniques or methods could include laboratory techniques, lecture method, small-group discussion, grouping plans, and other strategies used in the classroom.

Instructional strategies for this course are listed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructional strategies and activities for a course should be selected so that the overall teaching approach takes into account the instructional standards of a particular program, i.e., English as a Second Language, Programs for Adults with Disabilities.

**UNITS OF STUDY, WITH APPROXIMATE HOURS ALLOTTED FOR EACH UNIT**

Cover

The approximate time devoted to each instructional unit within the course, as well as the total hours for the course, is indicated. The time in class is consistent with the needs of the student, and the length of the class should be that it ensures the student will learn at an optimum level.

pp. 7-15

Units of study, with approximate hours allotted for each unit are listed in the COMPETENCY AREA STATEMENT(S) of the course outline. The total hours of the course, including work-based learning hours (community classroom and cooperative vocational education) is listed on the cover of every CBE course outline. Each Competency Area listed within a CBE outline is assigned hours of instruction per unit.

**EVALUATION PROCEDURES**

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The evaluation describes measurable evaluation criteria clearly within the reach of the student. The evaluation indicates anticipated improvement in performances as well as anticipated skills and competencies to be achieved.

Evaluation procedures are detailed in the TEACHING STRATEGIES AND EVALUATION section of the course outline. Instructors monitor students' progress on a continuing basis, assessing students on attainment of objectives identified in the course outline through a variety of formal and informal tests (applied performance procedures, observations, and simulations), paper and pencil exams, and standardized tests.

**REPETITION POLICY THAT PREVENTS PERPETUATION OF STUDENT ENROLLMENT**

Cover

After a student has completed all the objectives of the course, he or she should not be allowed to reenroll in the course. There is, therefore, a need for a statement about the conditions for possible repetition of a course to prevent perpetuation of students in a particular program for an indefinite period of time.

## **ACKNOWLEDGMENTS**

Thanks to LUZ GRANADOS for developing and editing this curriculum. Acknowledgment is also given ERICA ROSARIO for designing the original artwork for the course covers.

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**CALIFORNIA CAREER TECHNICAL EDUCATION MODEL CURRICULUM STANDARDS**  
**Business and Finance Industry Sector**  
**Knowledge and Performance Anchor Standards**

**1.0 Academics**

Analyze and apply appropriate academic standards required for successful industry sector pathway completion leading to postsecondary education and employment. Refer to the Business and Finance academic alignment matrix for identification of standards.

**2.0 Communications**

Acquire and accurately use Business and Finance sector terminology and protocols at the career and college readiness level for communicating effectively in oral, written, and multimedia formats.

**3.0 Career Planning and Management**

Integrate multiple sources of career information from diverse formats to make informed career decisions, solve problems, and manage personal career plans.

**4.0 Technology**

Use existing and emerging technology to investigate, research, and produce products and services, including new information, as required in the Business and Finance sector workplace environment.

**5.0 Problem Solving and Critical Thinking**

Conduct short, as well as more sustained, research to create alternative solutions to answer a question or solve a problem unique to the Business and Finance sector using critical and creative thinking, logical reasoning, analysis, inquiry, and problem-solving techniques.

**6.0 Health and Safety**

Demonstrate health and safety procedures, regulations, and personal health practices and determine the meaning of symbols, key terms, and domain-specific words and phrases as related to the Business and Finance sector workplace environment.

**7.0 Responsibility and Flexibility**

Initiate, and participate in, a range of collaborations demonstrating behaviors that reflect personal and professional responsibility, flexibility, and respect in the Business and Finance sector workplace environment and community settings.

**8.0 Ethics and Legal Responsibilities**

Practice professional, ethical, and legal behavior, responding thoughtfully to diverse perspectives and resolving contradictions when possible, consistent with applicable laws, regulations, and organizational norms.

**9.0 Leadership and Teamwork**

Work with peers to promote divergent and creative perspectives, effective leadership, group dynamics, team and individual decision making, benefits of workforce diversity, and conflict resolution as practiced in the Future Business Leaders of America (FBLA) career technical student organization.

**10.0 Technical Knowledge and Skills**

Apply essential technical knowledge and skills common to all pathways in the Business and Finance sector, following procedures when carrying out experiments or performing technical tasks.

**11.0 Demonstration and Application**

Demonstrate and apply the knowledge and skills contained in the Business and Finance anchor standards, pathway standards, and performance indicators in classroom, laboratory, and workplace settings, and through the Future Business Leaders of America (FBLA) career technical student organization.

## ***Business and Finance Pathway Standards***

### **A. Business Management Pathway**

Management consists of planning, leading, and controlling an organization or effort to accomplish a goal. In the Business Management pathway, students learn entrepreneurship and business fundamentals, goal-setting, resource allocation, organizational structure and management techniques, economics, financial data, risk management, information technology, and supply chain management.

#### **Sample occupations associated with this pathway:**

- ◆ Human Resources Specialist
- ◆ Education Administrator
- ◆ Purchasing Agent
- ◆ Office Manager
- ◆ Chief Financial Officer

- A1.0 Explain entrepreneurship and the fundamentals of developing a new business.
- A2.0 Plan, organize, secure, and manage resources of a project to achieve specific goals.
- A3.0 Investigate the functions and techniques of management and organizational structure and distinguish between small and large companies.
- A4.0 Apply economic concepts as they relate to business.
- A5.0 Analyze financial data in order to make short-term and long-term decisions.
- A6.0 Explain the importance of risk management and regulatory compliance in business.
- A7.0 Utilize information and technology tools to conduct business effectively and efficiently.
- A8.0 Construct a Marketing Plan.

**CBE**  
**Competency-Based Education**

**COMPETENCY-BASED COMPONENTS**  
**for the Administrative Assistant/1: Office Procedures Course**

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>A. ORIENTATION AND SAFETY</p> <p>Understand, apply, and evaluate classroom and workplace policies and safety procedures according to federal, state, and local industry standards.</p> <p>(5 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe the scope and purpose of the course.</li> <li>2. Describe classroom policies and procedures.</li> <li>3. Describe the importance of prioritizing work.</li> <li>4. Describe classroom and workplace first aid and emergency procedures.</li> <li>5. Describe the different occupations in the Finance and Business Industry Sector which have an impact on the role of the administrative assistant.</li> <li>6. Describe the purpose of the California Occupational Safety and Health Administration (Cal/OSHA) and its laws governing administrative assistants.</li> <li>7. Describe software copyright laws as they pertain to computers.</li> <li>8. Define ergonomics.</li> <li>9. Describe and demonstrate sound ergonomic practices in organizing one’s workspace.</li> <li>10. Describe causes, effects, and preventive measures for repetitive strain injuries.</li> <li>11. Describe and demonstrate correct typing technique and posture.</li> <li>12. Describe and demonstrate proper keyboard and monitor angle.</li> <li>13. Describe the benefits of periodic breaks to stretch and relax.</li> <li>14. Describe and demonstrate a variety of stretches involving the wrists, neck and shoulders.</li> <li>15. Describe and demonstrate the proper way to hold and move a mouse without gripping it hard or squeezing it.</li> <li>16. Describe the benefits of learning keyboard equivalent commands as opposed to mouse movements only.</li> <li>17. Pass the safety test with 100% accuracy.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 3, 4, 6, 7, 8, 12</p> <p><b>CTE Anchor:</b> Communications: 2.6 Health and Safety: 6.1, 6.2, 6.3, 6.4, 6.5, 6.6, 6.7 Responsibility and Flexibility: 7.2, 7.4, 7.6 Ethics and Legal Responsibilities: 8.2, 8.3, 8.4, 8.6 Technical Knowledge and Skills: 10.3, 10.10, 10.11, 10.12 Demonstration and Application: 11.1, 11.2, 11.4</p> <p><b>CTE Pathways:</b> A1.2, A1.3, A1.4, A2.2, A2.3, A3.4, A6.1, A6.2, A7.1, A7.2, A7.3</p>
<p>B. RESOURCE MANAGEMENT</p> <p>Understand, apply, and evaluate the basic principles of resource management in an office.</p>	<ol style="list-style-type: none"> <li>1. Define the following:             <ol style="list-style-type: none"> <li>a. resources</li> <li>b. management</li> <li>c. sustainability</li> </ol> </li> <li>2. Describe the management of the following resources in an office:             <ol style="list-style-type: none"> <li>a. time</li> <li>b. materials</li> <li>c. personnel</li> </ol> </li> </ol>	<p><b>Career Ready Practice:</b> 1, 4, 5, 12</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(1 hour)	<ol style="list-style-type: none"> <li>3. List specific examples of effective management of the following in an office:               <ol style="list-style-type: none"> <li>a. time</li> <li>b. materials</li> <li>c. personnel</li> </ol> </li> <li>4. Describe the benefits of effective resource management in an office:               <ol style="list-style-type: none"> <li>a. profitability</li> <li>b. sustainability</li> <li>c. company growth</li> </ol> </li> <li>5. Describe the economic benefits and liabilities of managing resources in an environmentally responsible way.</li> </ol>	<p>Demonstration and Application: 11.1</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>
<p>C. ELECTRONIC CALCULATING MACHINES</p> <p>Understand, apply, and evaluate the procedures for using electronic calculating machines.</p> <p>(5 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe the features and functions of the different machine parts.</li> <li>2. Describe and demonstrate the proper posture and fingering techniques.</li> <li>3. Describe and demonstrate basic computations on the machine.</li> <li>4. Improve accuracy and speed by calculating five of the following:               <ol style="list-style-type: none"> <li>a. financial transactions</li> <li>b. payroll transactions</li> </ol> </li> </ol>	<p><b>Career Ready Practice:</b> 1, 4, 5, 12</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3 Demonstration and Application: 11.1</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>
<p>D. TELEPHONE TECHNIQUES</p> <p>Understand, apply, and evaluate the procedures for handling telephone communications and identifying commonly used business equipment and services.</p>	<ol style="list-style-type: none"> <li>1. Identify and describe the features and functions of the following types of equipment:               <ol style="list-style-type: none"> <li>a. Private Branch Exchange (PBX)</li> <li>b. Centrex</li> <li>c. auto-dial</li> <li>d. computer conferencing</li> <li>e. speaker telephone</li> </ol> </li> <li>2. Describe the features and functions of the following types of telephone services:               <ol style="list-style-type: none"> <li>a. direct distance dialing</li> <li>b. credit card dialing</li> </ol> </li> <li>3. Describe the features and functions of the following types of calls:               <ol style="list-style-type: none"> <li>a. local</li> <li>b. long distance</li> <li>c. emergency</li> <li>d. conference</li> </ol> </li> </ol>	<p><b>Career Ready Practice:</b> 1, 4, 5, 12</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4 Demonstration and Application: 11.1</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>



COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(10 hours)	<ol style="list-style-type: none"> <li>4. Describe the functions of the following phone service features:               <ol style="list-style-type: none"> <li>a. call waiting/forwarding</li> <li>b. three-way conference calling</li> <li>c. cellular (mobile) phone unit</li> <li>d. memory feature</li> <li>e. speed dialing</li> <li>f. voice mail message</li> <li>g. caller ID</li> </ol> </li> <li>5. Describe and demonstrate the proper use of the following:               <ol style="list-style-type: none"> <li>a. telephone book</li> <li>b. directory assistance</li> <li>c. internet search</li> </ol> </li> <li>6. Describe the importance of placing and answering calls mindful of the following:               <ol style="list-style-type: none"> <li>a. area codes</li> <li>b. time zones</li> <li>c. application of company policies regarding telephone techniques</li> <li>d. prepared notes on routine inquiries</li> <li>e. prepared responses to routine telephone inquiries</li> </ol> </li> <li>7. Describe and demonstrate the following:               <ol style="list-style-type: none"> <li>a. answering calls promptly and courteously</li> <li>b. identifying the company, department, and self on the phone</li> <li>c. distinct enunciations and pronunciations for good voice personality</li> <li>d. screening, placing on hold, or transferring telephone calls</li> <li>e. proper techniques for writing telephone messages</li> <li>f. remaining calm when all lines are constantly ringing and/or many calls are on hold</li> <li>g. resolving telephone related client complaints</li> <li>h. handling calls from people with speech problems</li> <li>i. delivering message to the proper person</li> <li>j. leaving message with another person</li> <li>k. closing a call</li> </ol> </li> </ol>	
<p>E. E-MAIL</p> <p>Understand, apply, and evaluate the procedures for handling e-mail.</p> <p>(10 hours)</p>	<ol style="list-style-type: none"> <li>1. Define the following:               <ol style="list-style-type: none"> <li>a. electronic mail (a.k.a. e-mail or email)</li> <li>b. Simple Mail Transfer Protocol (SMTP)</li> <li>c. store-and-forward model</li> </ol> </li> <li>2. Open, sort, and distribute incoming emails.</li> <li>3. Describe and demonstrate the following procedures:               <ol style="list-style-type: none"> <li>a. creating/composing office emails</li> <li>b. answering office emails</li> <li>c. prioritizing and distributing office emails</li> <li>d. Contact management</li> </ol> </li> <li>4. Netiquette</li> <li>5. Compose five sample responses that can be used as templates for routine email inquiries.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
<p>F. MAIL</p> <p>Understand, apply, and evaluate the procedures for mail shipping and distribution.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Open, sort, and distribute incoming mail and faxes.</li> <li>2. Describe and demonstrate the procedures for handling, prioritizing, and distributing office mail.</li> <li>3. Describe and demonstrate proper addressing and posting of envelopes.</li> <li>4. Describe the importance of using proper zip codes.</li> <li>5. Identify classes of mail and determine which class would be used when preparing outgoing mail.</li> <li>6. Define common shipping terms and services.</li> <li>7. Describe and demonstrate the use of a parcel post chart.</li> <li>8. Weigh outgoing mail on a scale and calculate the postage.</li> <li>9. Compose five sample responses that can be used as templates for routine written inquiries.</li> <li>10. Electronic mail</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A1.3, A7.1, A7.2, A7.4, A7.5, A8.1, A8.3, A9.4</p>
<p>G. OFFICE TOOLS AND EQUIPMENT</p> <p>Understand, apply, and evaluate the procedures for using the reprographic equipment.</p> <p>(4 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe and demonstrate the safe use and maintenance of the following office tools and equipment: <ol style="list-style-type: none"> <li>a. personal computer</li> <li>b. computer server</li> <li>c. hard disk drive</li> <li>d. backup devices</li> <li>e. laser printer</li> <li>f. CD/DVD drive</li> <li>g. calculator</li> <li>h. copy machine</li> <li>i. fax machine</li> <li>j. electric sharpener</li> <li>k. electric stapler</li> <li>l. paper cutter</li> </ol> </li> <li>2. Define reprographics.</li> <li>3. Identify the different types of reprographic equipment.</li> <li>4. Identify the parts and function of the reprographic equipment.</li> <li>5. Demonstrate positioning copy and determining tone.</li> <li>6. Demonstrate document-loading.</li> <li>7. Demonstrate collating techniques.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 3, 4, 5</p> <p><b>CTE Anchor:</b> Health and Safety: 6.1, 6.3, 6.4, 6.5, 6.6 Technical Knowledge and Skills: 10.1, 10.2, 10.3 Demonstration and Application: 11.1</p> <p><b>CTE Pathways:</b> A2.3, A7.1, A7.2</p>
<p>H. DATA VERIFICATION</p> <p>Understand, apply, and evaluate the procedures for sorting and verifying data.</p>	<ol style="list-style-type: none"> <li>1. Read and analyze incoming memos, letters, financial statements and other documents by using word processing, spread sheet, database, or presentation software.</li> <li>2. Transfer data from a document to a form and verify.</li> <li>3. Verify list of documents against the source documents.</li> <li>4. Describe sorting business documents into subgroups of similar data.</li> <li>5. Verify a calculator tape against a handwritten list of figures.</li> <li>6. Given a mailing list, address envelopes; sort by zip code; and verify within a specified time limit.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	<ol style="list-style-type: none"> <li>7. Use the internet to research and/or verify the following business-related data:               <ol style="list-style-type: none"> <li>a. addresses, phone numbers, and email addresses of five national companies based in Los Angeles</li> <li>b. addresses, phone numbers, and email addresses of five clients</li> <li>c. addresses, phone numbers, and email addresses of five support services companies</li> </ol> </li> <li>8. Safeguarding data</li> </ol>	<p><b>CTE Pathways:</b> A7.1, A7.2, A7.4, A7.5</p>
<p>I. RECORDS MANAGEMENT</p> <p>Understand, apply, and evaluate data management procedures.</p>	<ol style="list-style-type: none"> <li>1. Identify the following:           <ol style="list-style-type: none"> <li>a. alphabetic filing</li> <li>b. numeric filing</li> <li>c. geographic filing</li> <li>d. subject/category filing</li> <li>e. chronologic filing</li> </ol> </li> <li>2. Identify the different types of records.</li> <li>3. Identify and describe indexing rules.</li> <li>4. Describe and demonstrate the following:           <ol style="list-style-type: none"> <li>a. inspection of document for release</li> <li>b. rerouting correspondence not released for filing</li> <li>c. selection of name, subject, or caption for filing</li> <li>d. determine need for cross-referencing</li> <li>e. marking a document with captions selected</li> <li>f. indication of cross-reference caption</li> <li>g. rough sorting of documents into groups by caption</li> <li>h. alphabetizing by captions</li> <li>i. arranging incoming and outgoing correspondence</li> <li>j. using primary, secondary, or special guides</li> <li>k. using guide captions</li> <li>l. preparing individual folders for use</li> <li>m. making folder labels</li> <li>n. arranging guides and folders</li> </ol> </li> <li>5. Describe and demonstrate the following:           <ol style="list-style-type: none"> <li>a. charging out records</li> <li>b. following up on borrowed records</li> <li>c. setting up and maintaining a daily/weekly calendaring system</li> <li>d. transferring active records</li> <li>e. transferring inactive records</li> </ol> </li> <li>6. Identify the elements of the alphabetic system.</li> <li>7. Describe and demonstrate the following steps to alphabetic filing:           <ol style="list-style-type: none"> <li>a. establish miscellaneous alphabetic file</li> <li>b. maintain miscellaneous alphabetic file</li> </ol> </li> <li>8. Identify the elements of the numeric system.</li> <li>9. Describe and demonstrate the following:           <ol style="list-style-type: none"> <li>a. assigning file numbers</li> <li>b. numbering correspondence</li> <li>c. knowing numbers of contracts, account numbers, and zip codes</li> </ol> </li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(15 hours)	<ul style="list-style-type: none"> <li>d. filing contracts, account numbers, zip codes</li> <li>e. maintaining numbers until requirements cease</li> </ul> <p>10. Identify the elements of geographic filing.</p> <p>11. Describe and demonstrate the following:</p> <ul style="list-style-type: none"> <li>a. filing by location</li> <li>b. filing by subject</li> <li>c. coding geographic files</li> <li>d. sorting geographic files</li> <li>e. identifying primary and secondary headings</li> <li>f. coding subject files</li> <li>g. sorting by subject files</li> </ul> <p>12. Identify the elements of subject/category filing.</p> <p>13. Describe and demonstrate the following:</p> <ul style="list-style-type: none"> <li>a. separating files into categories, establishing category names</li> <li>b. listing of categories, and creating filing index</li> <li>c. cross-filing</li> </ul> <p>14. Describe and demonstrate filing and retrieving 20 correspondence and forms using the following:</p> <ul style="list-style-type: none"> <li>a. alphabetic system</li> <li>b. numeric system</li> <li>c. subject/category system</li> <li>d. geographic system</li> </ul> <p>15. Describe the importance of being careful about details and thorough in completing records management tasks.</p> <p>16. Describe and demonstrate the following:</p> <ul style="list-style-type: none"> <li>a. managing and maintaining invoices, reports, memos, letters, financial statements, and other documents using word processing, spreadsheet, database, and/or presentation software</li> <li>b. filing and retrieving corporate documents, records, and reports</li> <li>c. ordering supplies, performing basic bookkeeping work</li> <li>d. preparing agendas and making arrangements for committee, board, and other meetings</li> </ul>	
<p>J. REFERENCE MATERIALS</p> <p>Understand, apply, and evaluate the procedures for using office reference materials.</p>	<p>1. Identify and describe the features and functions of the following reference materials:</p> <ul style="list-style-type: none"> <li>a. Dictionary</li> <li>b. Thesaurus</li> <li>c. secretarial handbook</li> <li>d. word division book for writing</li> <li>e. reference guides</li> <li>f. instructional manuals</li> <li>g. company procedure manual</li> <li>h. zip code directories</li> <li>i. almanacs</li> <li>j. atlases</li> <li>k. street guide books</li> <li>l. maps</li> </ul>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A7.1, A7.2, A7.4, A7.5</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(5 hours)	<ul style="list-style-type: none"> <li>m. internet</li> <li>n. employee handbook</li> </ul> <ol style="list-style-type: none"> <li>2. Incorporate data/information from the aforementioned reference materials in the following:               <ul style="list-style-type: none"> <li>a. report</li> <li>b. memo</li> <li>c. letter</li> <li>d. invoice</li> <li>e. financial statement</li> <li>f. PowerPoint presentation</li> </ul> </li> <li>3. Use search engines</li> </ol>	
<p>K. TRAVEL ARRANGEMENTS</p> <p>Understand, apply, and evaluate the procedures for documenting business travel arrangements by car, air, train, bus, or ship.</p> <p>(3 hours)</p>	<ol style="list-style-type: none"> <li>1. Define business travel.</li> <li>2. Describe the coordination of travel arrangements via the internet and travel agents.</li> <li>3. Describe and demonstrate the following:           <ul style="list-style-type: none"> <li>a. selection of means of travel, i.e., rental cars, buses, air, trains, or ships</li> <li>b. scheduling of meetings and appointments</li> <li>c. arranging hotel accommodations</li> <li>d. preparing an itinerary for a week of travel</li> <li>e. managing and maintaining an executive travel schedule</li> </ul> </li> <li>4. Prepare five travel folders with the following documents:           <ul style="list-style-type: none"> <li>a. transportation reservation confirmations</li> <li>b. meeting schedules</li> <li>c. hotel accommodation confirmations</li> <li>d. daily/weekly itineraries</li> <li>e. receipts</li> <li>f. phone/fax messages</li> </ul> </li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A7.1, A7.2, A7.4, A7.5</p>
<p>L. BUSINESS ETHICS AND ATTITUDES</p> <p>Understand, apply, and evaluate acceptable business ethics and attitudes.</p>	<ol style="list-style-type: none"> <li>1. Define the following:           <ul style="list-style-type: none"> <li>a. ethics</li> <li>b. attitudes</li> <li>c. behavior</li> </ul> </li> <li>2. Define and describe the following attitudes that are expected in the business world:           <ul style="list-style-type: none"> <li>a. dependability</li> <li>b. integrity</li> <li>c. self-control</li> <li>d. adaptability/flexibility</li> <li>e. cooperation</li> <li>f. stress tolerance</li> <li>g. initiative</li> <li>h. confidentiality</li> <li>i. accountability</li> </ul> </li> <li>3. Describe possible effects of positive and negative attitudes.</li> <li>4. Describe the importance of controlling anger and describe how anger may cause irrational thinking and poor decision making.</li> </ol>	<p><b>Career Ready Practice:</b> 1, 2, 4, 5</p> <p><b>CTE Anchor:</b> Technical Knowledge and Skills: 10.1, 10.2, 10.3, 10.4, 10.10</p> <p><b>CTE Pathways:</b> A7.1, A7.2</p>

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
	<ol style="list-style-type: none"> <li>5. Describe and demonstrate skills for meeting the public, making introductions, and greeting people.</li> <li>6. Describe the importance of human relations and oral communications.</li> <li>7. Describe the impact of personality traits on productivity.</li> <li>8. Describe the importance of first impressions.</li> <li>9. Describe and role-play the importance of effective communication with other people, including the ability to listen with openness and watching for nonverbal communication.</li> <li>10. Describe body language, including how positive and negative messages are received and sent.</li> <li>11. Identify the following types of dishonesty associated with office work: <ol style="list-style-type: none"> <li>a. larceny</li> <li>b. expense account abuse</li> <li>c. perquisite abuse</li> <li>d. bribery</li> <li>e. embezzlement</li> </ol> </li> <li>12. Describe appropriate times to verbalize opinions and how to deliver them effectively.</li> <li>13. Describe the importance of making judgments based on facts rather than hearsay.</li> <li>14. Describe discriminatory behavior in regard to race, color, national origin, gender, religion, sexual preferences, family status, disability, age, and character.</li> <li>15. Describe conflict resolution.</li> <li>16. Define sexual harassment and identify reporting procedures.</li> <li>17. Describe the organization of an office environment that maximizes productivity while considering human needs.</li> <li>18. Describe the coordination of daily office operations and priority setting.</li> <li>19. Describe the organizational structure/line of authority in the office and company.</li> <li>20. Describe managerial skills and types of managers.</li> <li>21. Describe the relationship of an employee to a manager and co-worker to co-worker.</li> <li>22. Describe how personal hygiene, nutrition, and health care affect your image.</li> <li>23. Describe why choosing garments that flatter individual body shape creates a positive image.</li> <li>24. Describe types of clothing that project a proper business image.</li> <li>25. Describe the influence of positive and negative personal habits on others' perception of you.</li> <li>26. Plan a work wardrobe, staying within a specified budget.</li> <li>27. Come to class wearing professional business clothing and demonstrating proper hygiene and personal habits.</li> </ol>	

COMPETENCY AREAS AND STATEMENTS	MINIMAL COMPETENCIES	STANDARDS
(20 hours)	<p>28. Solve three case studies by:</p> <ol style="list-style-type: none"> <li>a. identifying the problem</li> <li>b. analyzing the problem</li> <li>c. creating a solution that utilizes professional business ethics</li> </ol> <p>29. Copyright laws pertaining to business</p> <p>30. Social media ethics</p>	
<p><b>M. EMPLOYABILITY SKILLS</b></p> <p>Understand, apply, and evaluate the employability skills desired of administrative assistants.</p> <p>(3 hours)</p>	<ol style="list-style-type: none"> <li>1. Describe employer requirements for the following: <ol style="list-style-type: none"> <li>a. punctuality</li> <li>b. attendance</li> <li>c. attitude toward work</li> <li>d. quality of work</li> <li>e. teamwork</li> <li>f. responsibility</li> <li>g. timeliness</li> <li>h. communication skills</li> </ol> </li> <li>2. Identify potential employers through traditional and internet sources.</li> <li>3. Design sample résumés.</li> <li>4. Describe the importance of filling out a job application legibly, with accurate and complete information.</li> <li>5. Complete sample job application forms correctly.</li> <li>6. Describe the importance of enthusiasm in the interview and on a job.</li> <li>7. Describe the importance of appropriate appearance in the interview and on a job.</li> <li>8. Describe the importance of the continuous upgrading of job skills.</li> <li>9. Describe customer service as a method of building permanent relationships between the organization and the customer.</li> </ol>	<p><b>Career Ready Practice:</b> 2, 3, 6, 7, 9, 11, 12</p> <p><b>CTE Anchor:</b> Communications: 2.1, 2.2, 2.3, 2.4, 2.5, 2.6 Career Planning and Management: 3.1, 3.2, 3.3, 3.4, 3.5, 3.6, 3.7, 3.8, 3.9 Responsibility and Flexibility: 7.7 Leadership and Teamwork: 9.3, 9.4, 9.7 Technical Knowledge and Skills: 10.4, 10.8 Demonstration and Application: 11.5</p> <p><b>CTE Pathways:</b> A1.1, A1.2, A1.3, A1.4, A2.3, A3.1, A3.2, A3.3, A3.4, A3.5, A3.6, A4.2, A4.3, A7.1, A7.2, A7.3, A7.4, A7.5, A8.1, A8.4, A8.6</p>

## ***SUGGESTED INSTRUCTIONAL MATERIALS and OTHER RESOURCES***

### **TEXTBOOKS**

Dul, Jan and Bernard Weerdmeester. Ergonomics for Beginners, 2<sup>nd</sup> Edition. CRC, 2001.

Friedman, Jack. Dictionary of Business Terms. Barron's Educational Series, Incorporated, 2007.

Fulton-Calkins, Patsy. The Administrative Professional: Technology and Procedures. Cengage Learning, 2006.

Fulton-Calkins, Patsy and Karin M. Stulz. Procedures and Theory for Administrative Professionals (with CD-ROM), 6<sup>th</sup> Edition. South-Western Educational Publishing, 2008.

Grover, Chris. Word 2007: The Missing Manual. Pogue Press, 2007.

Grover, Chris, Matthew MacDonald and E. Vander Veer. Office 2007: The Missing Manual. Pogue Press, 2007.

Holmes, Ralph M. The Quick Reference Guide. Glencoe, 2000.

Jaderstrom, Susan and Joanne Miller. Complete Office Handbook: 3<sup>rd</sup> Edition. Random House Reference Publishing, 2002.

Levitt, Julie G. Your Career: How to Make it Happen, 3<sup>rd</sup> Edition. South-Western Educational Publishing, 2007.

Oliverio, Mary Ellen, William R. Pasewark, and Bonnie R. White. The Office: Procedures and Technology, 5<sup>th</sup> Edition. South-Western Educational Publishing, 2006.

O'Neil, Sharon Lund and Elwood N. Chapman. Your Attitude is Showing, 12<sup>th</sup> Edition. Prentice Hall, 2007.

Schulman, Madelyn L. and Bonnie F. Kowadlo. Working Smart, 3<sup>rd</sup> Edition. South-Western Educational Publishing, 2004.

Williams, John W. and Steven A. Eggland. Human Relations for Career Success, 6<sup>th</sup> Edition. South-Western Educational Publishing, 2004.



## **RESOURCES**

Employer Advisory Board members

CDE Model Curriculum Standards for Business and Finance

<http://www.cde.ca.gov/ci/ct/sf/documents/bizfinance.pdf>

California Department of Education. High School Academic Content Standards. California Department of Education, 2004.

California Department of Education. High School Exit Exam – English/Language. California Department of Education, 2001.

California Department of Education. High School Exit Exam – Mathematics. California Department of Education, 2001.

## **COMPETENCY CHECKLIST**

## ***TEACHING STRATEGIES and EVALUATION***

### **METHODS AND PROCEDURES**

- A. Lecture and discussion
- B. Demonstration
- C. Individualized instruction
- D. Multimedia presentations
- E. Development of critical thinking and listening skills
- F. Peer teaching and cooperative learning

### **EVALUATION**

SECTION A – Orientation and Safety – Pass the safety test with 100% accuracy.

SECTION B – Resource Management – Pass all assignments and exams on resource management with a minimum score of 80% or higher.

SECTION C – Electronic Calculating Machines – Pass all assignments and exams on electronic calculating machines with a minimum score of 80% or higher.

SECTION D – Telephone Techniques – Pass all assignments and exams on telephone techniques with a minimum score of 80% or higher.

SECTION E – E-Mails – Pass all assignments and exams on e-mails with a minimum score of 80% or higher.

SECTION F – Mail – Pass all assignments and exams on mail with a minimum score of 80% or higher.

SECTION G – Office Tools & Equipment – Pass all assignments and exams on office tools and equipment with a minimum score of 80% or higher.

SECTION H – Data Verification – Pass all assignments and exams on data verification with a minimum score of 80% or higher.

SECTION I – Records Management – Pass all assignments and exams on records management with a minimum score of 80% or higher.

SECTION J – Reference Materials – Pass all assignments and exams on reference materials with a minimum score of 80% or higher.

SECTION K – Travel Arrangements – Pass all assignments and exams on travel arrangements with a minimum score of 80% or higher.

SECTION L – Business Ethics and Attitudes – Pass all assignments and exams on business ethics and attitudes with a minimum score of 80% or higher.

SECTION M – Employability Skills – Pass all assignments and exams on employability skills with a minimum score of 80% or higher.

## ***Standards for Career Ready Practice***

### **1. Apply appropriate technical skills and academic knowledge.**

Career-ready individuals readily access and use the knowledge and skills acquired through experience and education. They make connections between abstract concepts with real-world applications and recognize the value of academic preparation for solving problems, communicating with others, calculating measures, and performing other work-related practices.

### **2. Communicate clearly, effectively, and with reason.**

Career-ready individuals communicate thoughts, ideas, and action plans with clarity, using written, verbal, electronic, and/or visual methods. They are skilled at interacting with others: they are active listeners who speak clearly and with purpose, and they are comfortable with terminology that is common to workplace environments. Career-ready individuals consider the audience for their communication and prepare accordingly to ensure the desired outcome.

### **3. Develop an education and career plan aligned with personal goals.**

Career-ready individuals take personal ownership of their educational and career goals and manage their individual plan to attain these goals. They recognize the value of each step in the educational and experiential process, and they understand that nearly all career paths require ongoing education and experience to adapt to practices, procedures, and expectations of an ever-changing work environment. They seek counselors, mentors, and other experts to assist in the planning and execution of education and career plans.

### **4. Apply technology to enhance productivity.**

Career-ready individuals find and maximize the productive value of existing and new technology to accomplish workplace tasks and solve workplace problems. They are flexible and adaptive in acquiring and using new technology. They understand the inherent risks—personal and organizational—of technology applications, and they take actions to prevent or mitigate these risks.

### **5. Utilize critical thinking to make sense of problems and persevere in solving them**

Career-ready individuals recognize problems in the workplace, understand the nature of the problems, and devise effective plans to solve the problems. They thoughtfully investigate the root cause of a problem prior to introducing solutions. They carefully consider options to solve a problem and, once agreed upon, follow through to ensure the problem is resolved.

### **6. Practice personal health and understand financial literacy.**

Career-ready individuals understand the relationship between personal health and workplace performance. They contribute to their personal well-being through a healthy diet, regular exercise, and mental health activities. Career-ready individuals also understand that financial literacy leads to a secure future that enables career success.

### **7. Act as a responsible citizen in the workplace and the community.**

Career-ready individuals understand the obligations and responsibilities of being a member of a community and demonstrate this understanding every day through their interactions with others. They are aware of the impacts of their decisions on others and the environment around them, and they think about the short-term and long-term consequences of their actions. They are reliable and consistent in going beyond minimum expectations and in participating in activities that serve the greater good.

**8. Model integrity, ethical leadership, and effective management.**

Career-ready individuals consistently act in ways that align with personal and community-held ideals and principles. They employ ethical behaviors and actions that positively influence others. They have a clear understanding of integrity and act on this understanding in every decision. They use a variety of means to positively impact the direction and actions of a team or organization, and they recognize the short-term and long-term effects that management's actions and attitudes can have on productivity, morale, and organizational culture.

**9. Work productively in teams while integrating cultural and global competence.**

Career-ready individuals contribute positively to every team, as both team leaders and team members. To avoid barriers to productive and positive interaction, they apply an awareness of cultural differences. They interact effectively and sensitively with all members of the team and find ways to increase the engagement and contribution of other members.

**10. Demonstrate creativity and innovation.**

Career-ready individuals recommend ideas that solve problems in new and different ways and contribute to the improvement of the organization. They consider unconventional ideas and suggestions by others as solutions to issues, tasks, or problems. They discern which ideas and suggestions may have the greatest value. They seek new methods, practices, and ideas from a variety of sources and apply those ideas to their own workplace practices.

**11. Employ valid and reliable research strategies.**

Career-ready individuals employ research practices to plan and carry out investigations, create solutions, and keep abreast of the most current findings related to workplace environments and practices. They use a reliable research process to search for new information and confirm the validity of sources when considering the use and adoption of external information or practices.

**12. Understand the environmental, societal, and economic impacts of decisions.**

Career-ready individuals understand the interrelated nature of their actions and regularly make decisions that positively impact other people, organizations, the workplace, and the environment. They are aware of and utilize new technologies, understandings, procedures, and materials and adhere to regulations affecting the nature of their work. They are cognizant of impacts on the social condition, environment, workplace, and profitability of the organization.

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## Statement for Civil Rights

All educational and vocational opportunities are offered without regard to race, color, national origin, gender, or physical disability.

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