



# Advanced Office Systems & Procedures (225)

## REGIONAL – 2016

### Multiple Choice:

Multiple Choice (20 @ 5 points each) \_\_\_\_\_ (100 points)

### Production Portion:

Job 1: Memorandum \_\_\_\_\_ (100 points)

Job 2: Itinerary \_\_\_\_\_ (100 points)

Job 3: Agenda \_\_\_\_\_ (100 points)

Job 4: Letter \_\_\_\_\_ (100 points)

***TOTAL POINTS*** \_\_\_\_\_ (***500 points***)

**Judge/Graders: Please double check and verify all  
scores and answer keys!**

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*Workplace Skills Assessment Program* competition.



**ADVANCED OFFICE SYSTEMS & PROCEDURES- REGIONAL 2016**  
**ANSWER KEY**  
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1	A
2	D
3	A
4	A
5	A
6	B
7	A
8	B
9	A
10	D
11	B
12	A
13	A
14	B
15	A
16	A
17	B
18	B
19	D
20	A



## MEMORANDUM

**TO:** Nancy Wells, Tom Carlson, Roger Meyer, Julie Smith, Edna Renick

**FROM:** Harvey Rosen

**DATE:** January 4, 20xx

**SUBJECT:** Corporate Giving Guidelines

Professional Business Associates is proud to support organizations that work to strengthen our communities. We look for projects that keep our communities strong, diverse, and vibrant. Our first priority is to support programs and organizations whose chief purpose is to benefit educational opportunities for low and moderate income individuals and families and career and technical student organizations. Areas of particular importance to Professional Business Associates are listed below.

1. **Community Development:** Through programs that create, sustain and promote economic development, by providing job training and workforce development and the revitalization and stabilization of communities.
2. **Education:** We support organizations that provide training for teachers and administrators working with low- and moderate-income students and encourage school partnerships with parents and guardians, the local community, and the business community.
3. **Arts and Culture:** Professional Business Associates considers proposals from organizations that help enhance a community's quality of life through arts, culture or civic projects, and other activities that provide diverse opportunities for that community's residents. Areas of particular funding interest are education and arts (museums, theater, opera, symphony, ballet, and all other types of performing or visual arts).

Professional Business Associates makes contributions to organizations with tax-exempt status under Section 501(c) (3) of the U.S. Internal Revenue Code, as well as to qualified tribal and governmental agencies, including public school systems.

Contestant #

**Graders**  
Criteria should be numbered.

**Job 1 – Memorandum**  
0 Errors = 100  
1 Error = 90  
2 Errors = 70  
3+ Errors = 0

Job Number, Contestant #



## ITINERARY

**Dr. Janice Anderson**

**January 13-14, 20\_\_**

**Job 2 – Itinerary**  
0 Errors = 100  
1 Error = 90  
2 Errors = 70  
3+ Errors = 0

### Wednesday, January 13

- 4:15 p.m. **Executive Car Service** will pick you up from the Columbus airport and take you directly to the Four Seasons, room confirmation # GHT8976.
- 5:30 p.m. Social hour with members of the Corporate Giving Board at Blink 55, located inside the Four Seasons; light snacks will be served.
- 7:00 p.m. The Simplot Bear River Boardroom has been reserved for the Corporate Giving Board Meeting.
- 9:00 p.m. Dinner reservations have been confirmed at the Four Seasons, Culina, for a party of ten.

### Thursday, January 14

- 8:15 a.m. Executive Car Service will pick you up from the Four Seasons to take you to the Professional Business Associates corporate offices.
- 8:45 a.m. Meeting with Nancy Wells, Chief Executive Officer.
- 12:00 p.m. Lunch with Cameron Burree and Luis Rodriquez, **Factory Manager of Amy's Kitchen**.
- 3:00 p.m. Demonstration of the revamped Volunteer Time tracking tool and its reporting and statistical capabilities.
- 7:00 p.m. Executive Car Service will take you to the Columbus airport.

**Note to Graders**  
Left align the times at the colon.  
Detail information begins at 1.5  
from the left margin.  
**Wording may vary.**



**PROFESSIONAL BUSINESS ASSOCIATES**

**Agenda**

**Corporate Giving**

**Wednesday, January 13, 20\_\_, 7 p.m.**

**Simplot Bear River Boardroom**

**Job 3 –Agenda**

0 Errors = 100  
1 Error = 90  
2 Errors = 70  
3+ Errors = 0

1. Call to Order—Nancy Wells, Chief Executive Officer
2. Roll Call—Harvey Rosen, Secretary
3. Reading of the Minutes—Harvey Rosen, Secretary
4. Treasurer’s Report—Julie Smith, Treasurer
5. Committee Reports
  - Community Investment—Grayson Kale
  - Financial Education—Dr. Janice Anderson
  - Team Member Philanthropy—Roger Rankin
  - Environmental Stewardship—Angelica Hulse
  - Community Reinvestment—Mark Lee
6. Unfinished Business
  - Grant Proposals
  - Government Relations
  - Regional Foundation
7. New Business
  - Recognition and Awards
8. Next Meeting Date
9. Adjourn



**ADVANCED OFFICE SYSTEMS & PROCEDURES- REGIONAL 2016  
ANSWER KEY  
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January 15, 20xx

Mr. Trevor Bell  
Event Coordinator  
Rimimi Coffee  
10789 East Providence St.  
Columbus, OH 45504

<p><b>Job 4 –Letter</b></p> <p>0 Errors = 100 1 Error = 90 2 Errors = 70 3+ Errors = 0</p>
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Dear Mr. Bell

**CONGRATULATIONS**

Each year during the month of November, Professional Business Associate members donate financially to the nonprofits of their choice. Based on employee choice and contributions, we are proud to award your grant proposal request in the amount of \$45,600 for the Workplace Skills Program developed and managed by Rimimi Coffee.

Our team members are leaders who give their time and money to mentor youth, raise funds and serve on nonprofit boards. In 2015, 5,600 team members recorded more than 200,000 volunteer hours in our Volunteer Time tracking tool, a 13% increase from 2014. This is equivalent to giving \$4.51 million to support our communities.

I have enclosed the guidelines for receiving the funding and the reporting process on the success of the program. Edna will be your point of contact, and she can be reached at [erenick@PBA.com](mailto:erenick@PBA.com).

Sincerely

Roger Meyer  
Marketing Department

Contestant #

Enclosure

c Edna Renick

Job Number, Contestant #