

R E P O R T R E S U M E S

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IDENTIFICATION OF MAJOR TASKS PERFORMED BY MERCHANDISING
EMPLOYEES WORKING IN THREE STANDARD INDUSTRIAL
CLASSIFICATIONS OF RETAIL ESTABLISHMENTS.

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OCCUPATIONS, MOSCOW, IDAHO, KING COUNTY, PIERCE COUNTY,
WASHINGTON, STANDARD INDUSTRIAL CLASSIFICATIONS

BY QUESTIONNAIRE, FACTS WERE OBTAINED REGARDING 12
CATEGORIES OF MERCHANDISING PERFORMED BY 609 SUPERVISORY AND
NONSUPERVISORY PERSONNEL OF 33 DEPARTMENT, LIMITED-PRICE
VARIETY, AND GENERAL MERCHANDISING STORES. THIS SAMPLE WAS
SELECTED FROM A POPULATION OF 13,643 MERCHANDISING EMPLOYEES,
WORKING IN A TOTAL OF 234 FIRMS, IN KING AND PIERCE COUNTIES,
WASHINGTON. THE WORK CATEGORIES WERE SELLING, STOCKKEEPING,
CHECKSTAND OPERATION, MERCHANDISE RECEIVING AND MARKING,
DELIVERY, RECORD KEEPING, COMPUTING, DISPLAY, ADVERTISING,
BUYING, PRICING, AND MERCHANDISE CONTROL. DATA GATHERED BY
THE QUESTIONNAIRE WERE USED TO CALCULATE PERCENTAGES OF
EMPLOYEES PERFORMING EACH CATEGORY OF WORK. OTHER COLLECTED
DATA PROVIDED A PROFILE OF THE WORKERS IN TERMS OF
OCCUPATIONAL TRAINING, EDUCATION, SEX, AGE, EXPERIENCE IN
PRESENT OCCUPATION, JOB MOBILITY, EMPHASIS OF HIGH SCHOOL
STUDY, AND GROUPINGS OF MAJOR TASKS PERFORMED. THIS
INFORMATION WAS TO BE USED IN IDENTIFICATION AND ASSESSMENT
OF KNOWLEDGES AND KNOWLEDGE CLUSTERS MOST LIKELY TO PROVIDE
BASES FOR TRAINING AND CAREER-LONG ADVANCEMENT. THE KNOWLEDGE
ASSESSMENT STUDY WAS IN PROGRESS AT THE TIME OF REPORTING,
AND FURTHER ANALYSIS OF THE QUESTIONNAIRE DATA WAS TO BE
POSTPONED UNTIL AFTER ITS COMPLETION. THIS VOLUME REPRESENTS
PART 6 OF THE 13-PART FINAL REPORT ON THE
VOCATIONAL-TECHNICAL EDUCATION RESEARCH AND DEVELOPMENT
PROJECT OF WASHINGTON STATE UNIVERSITY. RELATED VOLUMES ARE
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FINAL REPORT
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U. S. DEPARTMENT OF
HEALTH, EDUCATION, AND WELFARE

Office of Education
Bureau of Research

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**IDENTIFICATION OF MAJOR TASKS PERFORMED BY
MERCHANDISING EMPLOYEES WORKING IN THREE
STANDARD INDUSTRIAL CLASSIFICATIONS
OF RETAIL ESTABLISHMENTS**

**Project No. ERD-257-65
Contract No. OE-5-85-109**

Kenneth A. Ertel

December, 1966

The research reported herein was performed pursuant to a contract with the Office of Education, U.S. Department of Health, Education, and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express freely their professional judgment in the conduct of the project. Points of view or opinions stated do not, therefore, necessarily represent official Office of Education position or policy.

University of Idaho

Moscow, Idaho

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INTRODUCTION

Task and Knowledge Clusters Concepts

One major purpose of Project ERD-257-65 is to identify clusters of knowledge and competencies most likely to maximize the career-long occupational opportunity, competence, and choice of non-college bound youth in an evolving technological society.

This research is rooted in the philosophic premise that occupational freedom involves both informed choice of alternatives and competence to work effectively. The economy needs constantly larger numbers of workers possessing new capabilities. But youth can evaluate only those occupational choices that they perceive. They are free to perform only the kinds of work for which they acquire competence.

Choice and acquisition of competence may be needlessly impaired by limited outlooks and motivations. For those reasons, studies of occupational perceptions and aspirations constitute other dimensions of this project.

The objective of our clusters research is to obtain facts about what major types of tasks are actually performed in occupations most likely to provide employment opportunity for substantial percentages of non-college bound youth and to identify major types of knowledge most likely to prepare them for such work. On the basis of Bureau of Labor Statistics projections, the following occupational areas were selected for study: office, general merchandise retailing, building trades, electronics, food services, and child care.

To obtain task and knowledge data for clustering, the staff, in consultation with employers, employees, and vocational teachers, prepared questionnaire check lists designed to identify specific major tasks actually performed by workers in each of the occupational areas listed above.

Questionnaires were designed to obtain from employees data on age, sex, major types of tasks presently performed, length of time on present job, and other types of work done in the past five years.

These questionnaires have been administered to representative samples of workers in each occupational area. To maximize the predictive value of data, questionnaires were administered mainly to employees in modernized leading-edge firms in which the nature of present work is most likely to represent that prevailing in the foreseeable future.

Results provide data on (a) combinations of major task groups of workers presently perform, (b) combinations of major tasks performed on entry jobs, and (c) combinations of tasks generally performed by workers with various degrees of experience, and (d) some data on five-year combinations of worker experience.

From analysis of the above data, we have obtained up-to-date facts about some combinations of major tasks performed by major categories of workers in entry jobs and in positions representing career development opportunities.

Knowledge clusters associated with performance of tasks are in various stages of development, identified by juries of employees, supervisors, and vocational teachers.

Both task and knowledge items are being coded so various patterns of relationships can be identified by computer.

We are identifying (1) some clusters of knowledge useful within each occupational area and (2) some clusters that are commonly useful in two or more areas.

Facts about currently useful tasks and knowledge are being supplemented by studies of ways they will be affected by equipment, processes, and materials now being developed by leading-edge industries.

Objectives

The specific objective of this phase of Project ERD-257-65 is to obtain facts about what major types of tasks are actually performed in major retailing occupations and to identify major types of levels of knowledge most needed to prepare students for such work. Data are coded and processed in ways permitting future identification of retailing knowledges also useful in construction, wholesaling, electronics, office, food service, and non-farm agricultural occupations. To do this we will:

1. Develop a research instrument by which we can identify the major tasks and associated knowledges necessary for successful employment in the merchandising operation of modern retail firms.

2. Analyze the knowledges necessary to perform the major tasks in the retail field in order to identify clusters of concepts common to all the vocational fields and conversely to isolate those concepts unique to the field studied.

Hypotheses

1. There is a body of knowledge common to performance of a wide range of tasks commonly classified within major categories of retailing work.

2. There are differences in levels of knowledge essential for specific task performance for supervisory and non-supervisory personnel.

3. There are some differences in the types and levels of knowledge essential for successful employment in large, medium and small stores.

Limitations

This study is limited to an analysis of the types and levels of knowledges essential to perform the major tasks normally associated with the merchandise category of stores, specifically; SIC 531, depart-

ment stores ; SIC 533, limited price variety stores, and SIC 539, general merchandise stores.¹

The study is further limited to a study of tasks performed by non-supervisory and supervisory employees. Work done by management personnel is excluded.

Operational Definitions

TASK: A task is conceived as an activity constituting a distinct and necessary part of the work done by an employee. It is a work unit involving specific acts, procedures, techniques and judgments. A task may involve any one or more of the above elements. It may be physical, such as pulling and lifting, or it may be mental, such as selecting, arranging, computing, explaining. It may involve combinations of physical and mental work. Some tasks involve changing the nature of materials; others involve only arrangement of materials. Each task has certain distinguishing characteristics:

1. It is recognized, usually, as being one of the worker's principal responsibilities.
2. It occupies a significant portion of the worker's time.
3. It involves work operations which utilize closely related skills and knowledges.
4. It is performed for some purpose, by some method, according to some standard with respect to speed, accuracy, quality, or quantity. This standard

¹Studies of knowledges essential for employment in a broad range of distributive jobs are currently being conducted at the University of Washington. Virginia Polytechnic Institute is studying major tasks in the general merchandise retail field other than those normally associated with the merchandising division. These projects have been coordinated to avoid overlap on initial exploratory studies.

may be derived by the worker himself as a result of experience; or it may be set by managers and supervisors in forms of oral, written, or graphic instructions.

Tasks or duties may be considered major or minor, depending on the percentage of total work time involved in their performance. Their simplicity or complexity can be measured in terms of differences in the levels of skills, knowledge and judgment involved.²

NON-SUPERVISORY EMPLOYEE: An non-supervisory employee is anyone concerned with the actual performance of the tasks constituting major portions of work in retail stores (selling, customer service, stockkeeping, promotion activities, clerical functions, etc.). He may perform routine tasks or perform limited supervisory functions.

SUPERVISOR: A "supervisor" is a classification of general merchandise retailing employees. He is one who spends over 50 per cent of his time in managerial work. He must be in charge of, and have as his primary duty, the management of a recognized unit which has a continuing function.

He customarily and regularly supervises at least two full-time employees or the equivalent. He has authority to effect or recommend employment, dismissal, promotion or transfer of the employees he supervises. He regularly and customarily exercises discretionary powers.

²"Defining the Terms Executive . . . Administrative . . . Professional . . . Outside Salesman," Washington: Regulations and Interpretations of the Code of Federal Regulations, Title 29, Part 541, WHPC Publication 1029, U.S. Government Printing Office, May 19, 1965.

STANDARD INDUSTRIAL CLASSIFICATION: "The Standard Industrial Classification was developed for use in the classification of establishments by types of activity in which engaged; for purposes of facilitating the collection, tabulation, presentation, and analysis of data relating to establishments; and for promoting uniformity and comparability in the presentation of statistical data collected by various agencies of the United States Government, state agencies, trade associations, and private research organizations."³ These classifications are widely used for reporting distributive education enrollments in categories congruent with those used by the Census of Business.

"SIC 531--Department Stores--Establishments normally employing twenty-five people or more and engaged in selling some items in each of the following lines of merchandise: (1) Furniture, home furnishings, appliances, radio and TV sets; (2) A general line of apparel for the family; (3) household linens and dry goods.

"SIC 533--Limited Price Variety Stores--Establishments primarily selling a variety of merchandise in the low and popular price ranges such as stationary, light hardware, toys, housewares, confectionery. These establishments frequently are known as 'Five and Dime' stores.

"SIC 539--General Merchandise Stores--Establishments primarily selling household linens and dry goods, and/or a combination of apparel, hardware, home-ware or home furnishings and other lines in limited amounts. Establishments which meet the criteria for department stores, except as to employment, are included in this classification. Also including Dry Goods Stores (establishments primarily selling sewing and knitting supplies and yarn or any combination of these commodities)."⁴

³Standard Industrial Classification for Use in Distributive Education, Washington: U.S. Government, Department of Health, Education, and Welfare, OE-83013, 1964, p. iii.

⁴Ibid., p. 3.

Review of Related Research

A paper presented by the American Institutes for Research suggests some first steps in vocational analysis.⁵ The Institute outlines seven steps required to formulate sets of topic objectives and course objectives. These objectives will be derived from statements of performances actually required for specific jobs constituting job families.

Wesley L. Face and Eugene R. Flug⁶ have recently developed a set of concepts that can serve as a framework for Industrial Arts instruction. Their approach is adapted to serve as a framework for this study.

Several previous studies are germane to the method utilized for this study. Doris Anita Berry developed a model for vocational curriculum research with her study of "The Role of Office Practice Instruction in the Training for General Office Assignments."⁷ She developed job descriptions for nineteen major general office jobs from information provided by employers and personnel managers and tested the validity of these descriptions by interviews with employees. As a result of inconsistencies found between accepted descriptions of the role of general office employees

⁵"Some Suggestions Concerning First Steps in Vocational Analysis," Pittsburg: American Institutes for Research, Institutes for Performance Technology, (Project ABLE), February 5, 1965.

⁶Wesley L. Face and Eugene R. Flug, "Development of a Conceptual Framework for the Teaching of Industrial Arts," Menomonie, Wisconsin: Stout State University, Cooperative Research Project No. 5--68, January, 1965.

⁷Doris Anita Berry, "The Role of Office Practice Instruction in the Training for General Office Assignments," unpublished Doctoral dissertation, Indiana University, 1963, 280 pages.

and what they actually do in performance of their tasks, extensive revision was suggested for the office occupations curriculum.

Lucy C. Crawford is currently studying the technical content competencies essential for teachers of distributive education.⁸ Her research design indicates an analysis of competencies needed for entry jobs and for advancement.

Other studies pertaining to the work of retail personnel by Folley,⁹ Rhulow,¹⁰ Routson,¹¹ and Goldberg,¹² offer data on the knowledges necessary for success in retailing occupations.

Peter G. Haines, et. al., studied the knowledge and competencies needed by teachers of distributive subjects.¹³ Textbooks, course syllabi and instruc-

⁸Lucy C. Crawford, "A Competency Pattern Approach to Curriculum Construction in Distributive Teacher Education," mimeographed paper describing research in progress presented at American Vocational Association Convention, Miami, December 8, 1965.

⁹John D. Folley, Jr., "Development of a List of Critical Requirements for Retail Sales Personnel from the Standpoint of Customer Satisfaction," unpublished Masters' thesis, University of Pittsburgh, 1953.

¹⁰D. H. Rhulow, "Training Department Store Employees," unpublished Masters' thesis, University of Nebraska, 1961.

¹¹Jack Craig Routson, "An Observational Analysis of Functional Performance of Retail Sales Personnel," unpublished Doctoral dissertation, University of Illinois, 1964.

¹²Herbert B. Goldberg, "Job Performance Evaluations at R. H. Macy and Company," unpublished Doctoral dissertation, New York University, 1962.

¹³Peter G. Haines, et. al., "Technical Content Competencies Needed by Teachers of the Distributive Subjects," National Business Education Quarterly, Vol. 32, No. 2, Winter 1964-65, 38-50.

tional materials were analyzed to ascertain content commonly taught in distributive education classes. Judgments of distributive teacher educators regarding the relative importance of content items were obtained.

Mahoney, et. al., developed a procedure for measuring management performance.¹⁴ Findings derived from that study are not directly related to this one. However, the technique described for the collection of work descriptions and identification of patterns of performance has direct application.

Schultz and Siegel have attacked the analysis of job performance by multidimensional scaling techniques.¹⁵ Palmer and McCormick have analyzed the values and limitations of factor analysis as a job analysis technique.¹⁶ The results of both studies tend to support the view that work activities can be identified and the variety of human work activities may be conceptualized with greater simplicity and economy in terms of cluster. Examples of these techniques are found in Chalupsky's study of clerical jobs,¹⁷ and in Denton and Prien's study of purchasing

¹⁴Thomas A. Mahoney, et. al., Development of Managerial Performance . . . A Research Approach, Monograph c-9, Southwestern Publishing Co., Chicago, January, 1963.

¹⁵Douglas G. Schultz and Arthur I. Siegel, "The Analysis of Job Performance by Multidimensional Scaling Techniques," Journal of Applied Psychology, 1964, Vol. 48, No. 5, 329-335.

¹⁶George J. Palmer, Jr. and Ernest J. McCormick, "A Factor Analysis of Job Activities," Journal of Applied Psychology, 1961, Vol. 45, No. 5, 289-294.

¹⁷Albert B. Chalupsky, "Comparative Factor Analysis of Clerical Jobs," Journal of Applied Psychology, 1962, Vol. 46, No. 1, 62-66.

personnel functions.¹⁸ These studies have aided in formulation of the technique utilized for this study.

C. S. Brigman, et. al., in a study of salesmanship, examined use of the critical incident technique.¹⁹ To be critical, an incident must occur in a situation where its consequences are sufficiently definite to leave little doubt concerning its effects. Essentially, the procedure is to obtain first-hand reports, or reports from objective records, of satisfactory and unsatisfactory execution of the task assigned. The cooperating individual described a situation in which success or failure is determined by specific reported causes.

Lucy C. Crawford reviewed applications of numerous occupation analysis techniques.²⁰ She analyzed concepts of "competencies" as an approach to distributive education curriculum development. She recommends that approach as a promising means of improving instruction.

METHOD

Development of Tasks and Knowledges Instrument

Recent job descriptions and training manuals from major retail firms were obtained and analyzed. Related

¹⁸J. C. Denton and Erich P. Prien, "Defining the Perceived Functions of Purchasing Personnel," Journal of Applied Psychology, 1963, Vol. 47, No. 5, 332-338.

¹⁹C. S. Brigman, et. al., "Salesmen Helped by Bringing Out Jobs' Critical Incidents," Personnel Journal, 36:411-14, April, 1958.

²⁰Lucy C. Crawford, "Review of Research and Literature on the Competency Pattern Approach to Curriculum Construction or Revision for Distributive Teacher Education," an independent master's degree paper, University of Minnesota, Minneapolis, 1964, pp. 27-35.

conceptual and methodological research was examined. Training department personnel of leading-edge retail firms were interviewed to conceptualize the tasks and knowledges involved in major categories of work in retail stores. Major work categories were conceptualized as: selling, stockkeeping, cashiering, receiving--marking merchandise, display, advertising, delivery, record keeping, pricing, buying, controlling merchandise, and customer relations.

Initially, an interview assessment instrument was structured to assist trained interviewers in assessing responses in terms of the frequencies with which various types and levels of knowledges are utilized by non-supervisory and supervisory personnel. Levels of knowledge were conceived and classified in terms derived from Bloom's Taxonomy of Educational Objectives, Cognitive Domain.⁴¹ Those terms were "application," "comprehension" and "understanding."

Over 300 activities involved in performance of the twelve major tasks were conceptualized. For response checking, items were arranged in vertical columns under headings signifying each major task.

Knowledge items hypothetically associated with task performance were conceptualized and arranged for response checking in vertical columns to the right of the columns listing tasks. The original interview design sought employees' judgments about whether they used a knowledge "frequently," "rarely" or "never."

A set of examples of knowledge elements structured at the three levels of knowledge was developed. A pattern of criterion questions designed to test consistency of response in terms of levels of knowledge was built into the assessment instrument and a field study was designed to evaluate the instrument.

Four interviewers used the instrument in interviews with fourteen employees and supervisors.

⁴¹Benjamin S. Bloom, et. al., Taxonomy of Educational Objectives, Cognitive Domain, New York: David McKay Company, Inc., 1956.

Field tests of the original instrument revealed that interviewees had difficulty distinguishing between the terms "frequently," "rarely," "never." Still fewer could distinguish between the meanings of the terms "application," "comprehension" and "understanding."

At that point effort to obtain employee judgments in terms of the Bloom concepts was abandoned. But the instrument and interview procedures were revised, substituting the phrases "need to know" and "do not need to know" for "frequently," "rarely" and "never." Again few interviewees indicated ability to make reasonably firm distinctions.

Since the ultimate goal of the research is curriculum development, up-to-date facts about major tasks and associated activities performed by substantial percentages of employees were deemed essential. Such facts can then be analyzed in terms of the types and levels of knowledges essential to satisfactory task performance.

Consequently, the instrument was redesigned to obtain facts about the frequency with which non-supervisory and supervisory categories of employees perform various combinations of tasks.

Field Testing

The instrument was field tested to (a) establish a basis for validation, (b) identify items that should be added or deleted, (c) test effective distribution and collection methods.

The instrument was sent to a random selection of 212 employees of firms in the three SIC classifications covered by the study. Fifty-eight employees returned questionnaires.

To test the validity of responses interviews were arranged with a random selection of those who returned questionnaires. Again, criterion questions selected from within each major task area and questions on the personal data sheets were used in the interviews.

Comparison of responses obtained by the two procedures indicated substantial agreement and consistency. It was concluded that responses to the questionnaire provided reliable information.

The questionnaires returned and the follow-up interviews indicated a need for clarification of the designation supervisory personnel. Therefore, four items (job title, number of employees supervised, title of immediate supervisor and major tasks performed) were included in the personal data sheets.

The interviews also indicated that the questionnaire was too long and that it included unanswerable questions because some major tasks were supervisory by definition. Therefore, the instrument was separated into two forms, one for non-supervisory employees and one for supervisors.

The personal data questions were the same on both forms. Five of the major tasks common to both categories of employment are included in both forms. Where a task, (i.e., buying, selling, stock control) is unique to one category of employment only representative items are included in the other questionnaire. Thus, data remains sufficient for comparisons of tasks performed by non-supervisor and supervisory employees.

The Sample

The total population of this study is all employees in all stores in SIC 531, department stores; SIC 533, limited price variety stores; and SIC 539, general merchandise stores. A parent population of all such stores in King and Pierce Counties, Washington, was identified. This metropolitan area, which includes the cities of Seattle and Tacoma, was chosen because it closely resembles the national population in terms of percentage of stores, size of stores, and percentages of employees in each SIC category selected. (See APPENDIX B)

In the United States as a whole, general merchandise payrolls constitute 15.1 per cent of all retail payrolls. In Washington State the corresponding

figure is 15.3.²² In the United States the number of general merchandise establishments is 3.6 per cent of all retail establishments. The corresponding percentage in Washington is 3.1.²³

The number of employees in retail trade in the general merchandise field was also comparable. In the United States it was 17.5 per cent and 16.7 per cent for Washington.²⁴

Sixty-two per cent of the retail sales in the general merchandising retail field in the state of Washington were made in King and Pierce counties.²⁵

Data showing types of establishments employing various numbers of employees during July, August, and September, 1965 were used. Data for those months was selected because it shows the least fluctuation due to temporary employment. Weighted sampling rates for firms and for employees were established.

In order to establish the sampling rate for firms and to determine the number of firms to be sampled, three strata, (SIC 531, SIC 533, and SIC 539) of stores were designated with a differing sampling rate from stratum to stratum. Then a second stage was designated with a differing sampling rate for employees in each strata. The result was a stratified disproportionate two-stage cluster sample selected with unequal sampling rates in the second stage.

Since the stores were originally selected with sampling rates differing from stratum to stratum (disproportionate stratified sampling), it was possible to design the sample to yield self-weighting estimates

²²Omer L. Carey, et. al., Trends in Distribution, Services, and Transportation, Pullman, Washington: Washington State University, Economic and Business Studies, Bulletin Number 41, 1966, p. 70.

²³Ibid., p. 69.

²⁴Ibid., p. 68.

²⁵Ibid., p. 78.

of population parameters. This procedure was preferred because the sample data yield either unbiased or slightly biased, but consistent, estimates of population without complicated sets of stratum and cluster weights. The total procedure is described technically as a stratified disproportionate two-stage cluster sample selected with unequal sampling rates in the second stage. The steps followed in making the sample are described in Sampling and Statistics Handbook for Surveys in Education.²⁶

Thirty-three out of 234 firms, and 900 out of 13,643 employees were sampled.

TABLE II

DATA USED IN SELECTING A STRATIFIED DISPROPORTIONATE TWO-STAGE CLUSTER SAMPLE OF EMPLOYEES IN SIC 531, SIC 533, AND SIC 539, IN KING AND PIERCE COUNTIES, WASHINGTON, JULY, 1965

SIC	Firms	No. Firms Smpld.	Sampling Rate for Firms	Emp. (Est.)	Sampling Rate for Emp.	No. of Emp. Smpld.	Prob. of Selecting a Particular Employee
531	37	8	0.21	11,516	.33	760	.066
533	81	10	0.13	1,164	.50	77	.066
539	116	15	0.13	963	.50	63	.066
TOTALS				13,643		900	

²⁶Sampling and Statistics Handbook for Surveys in Education, Washington; Research division of the National Education Association, 1965, pp. 390-395.

Table II is the model used for determining the number of employees sampled and the probability of selecting a particular employee in each strata. It is a theoretical model based on a population of employees estimated from data which listed employment in all divisions of the firms for July, August, September, 1965. The actual number of employees sampled in each strata (SIC 531 = 708; SIC 533 = 59; SIC 539 = 80; Total = 847) reflects adjustment to the actual employment data found in the field at the time the survey was taken.

Variables

The major variables are the tasks performed in each of the three standard industrial classifications by non-supervisory and supervisory employees.

Possible contaminating variables which may affect the tasks performed and the type and levels of knowledge needed for task performance have been identified and, where no control can be established through design of the study, descriptions of the extent of the variable are abstracted from data gathered from the employee profile sheets attached to the questionnaire.

Analysis of the Data

The significance of the difference in returns between the three strata will be tested by the formula for the test between two independent proportions.²⁷

Tests of the differences between proportions of yes responses between standard industrial classifications and between non-supervisory and supervisory personnel will be made by the procedures outlined by Ferguson.²⁸

²⁷George A. Ferguson, Statistical Analysis in Psychology and Education, New York: McGraw-Hill, Inc. Second Edition, 1966, p. 177.

²⁸Ibid. p. 178.

random number. Then a stratified random sample was completed by selecting every other employee performing functions normally assigned the merchandising division. (See APPENDIX E, Instructions for interviewers) Numbered questionnaires were distributed to each selected non-supervisory employee (white form) and to each supervisor (blue form) either by the interviewer or by the manager. The interviewer then either waited for the completed forms or else returned the same day to pick them up. In cases where the selected person was not on-the-job, a later call was made.

Forty-eight non-supervisory level and eleven supervisory level questionnaires were distributed to the ten selected stores in SIC 533.²⁹

Comparison was made between the estimated number of employees (280) as of July, 1965, which included employees in all divisions, the total number employed as of June, 1966 (201) when the survey was taken and the number (114) performing tasks normally associated with the merchandising division.

Sixty-two non-supervisory level and eighteen supervisory level questionnaires were distributed to the fifteen selected stores in SIC 539.³⁰ The same procedures as used in SIC 533 were used for selection of the employees sampled. (See Table III, APPENDIX H)

A total of 672 non-supervisory level and 175 supervisory level questionnaires were distributed to all strata.

²⁹One firm of the original ten selected in SIC 533 from the master list of firms dated July, 1965, was no longer in operation. One firm declined to cooperate in the survey. Therefore, the next firms on the random order list were selected.

³⁰One firm of the original 15 selected in SIC 539 from the master list of firms dated July, 1965, was no longer in operation. Two firms were scratched because they employed no personnel at the time the sample was taken. One firm agreed to participate, but after the questionnaires remained on the employer's desk during four days the interviewer picked them up on his second follow-up call. In each case the next firm on the random order list was selected.

All eight stores identified by the original random selection agreed to participate. The actual number of employees, 4,788, as of June, 1966, and the number employed in the merchandising division, 2,196, were listed for comparison with our estimated population of 5,040 employees. (See table III, APPENDIX H for the number of employees by firms.) A total of 562 employee level and 146 supervisory level forms were distributed in SIC 531, Department Stores.

SIC 533, VARIETY STORES AND SIC 539, GENERAL MERCHANDISE STORES

Ten of the 81 firms in SIC 533 and fifteen of the 116 firms in SIC 539 were randomly selected from an alphabetical list of all stores in these strata of the population. In each store one-half of the employees were selected by a stratified random sampling process from an alphabetical listing provided by the employer.

The manager was contacted by one of four trained interviewers, each assigned to cover specific firms. A letter describing the research, seeking assistance from the management and introducing the interviewer as a member of the University's research staff preceded the scheduled meeting. (See APPENDIX C)

To distribute questionnaires to SIC 533 and SIC 539 stores, our distributive education coordinators from high schools and junior colleges in the Seattle and Tacoma area served as interviewers. They participated in a four-hour training project designed to teach them appropriate procedures for gaining management cooperation, randomly sampling within firms, administration and collection of questionnaires, and follow-up.

Each interviewer was given a packet containing a brief statement of the purposes of the project (See APPENDIX D), a set of detailed instructions for selection of store samples (See APPENDIX E) and for distribution and collection of the forms.

The first employee selected on the alphabetical listing was chosen by assignment of a pre-selected

random number. Then a stratified random sample was completed by selecting every other employee performing functions normally assigned the merchandising division. (See APPENDIX E, Instructions for interviewers) Numbered questionnaires were distributed to each selected non-supervisory employee (white form) and to each supervisor (blue form) either by the interviewer or by the manager. The interviewer then either waited for the completed forms or else returned the same day to pick them up. In cases where the selected person was not on-the-job, a later call was made.

Forty-eight non-supervisory level and eleven supervisory level questionnaires were distributed to the ten selected stores in SIC 533.²⁹

Comparison was made between the estimated number of employees (280) as of July, 1965, which included employees in all divisions, the total number employed as of June, 1966 (201) when the survey was taken and the number (114) performing tasks normally associated with the merchandising division.

Sixty-two non-supervisory level and eighteen supervisory level questionnaires were distributed to the fifteen selected stores in SIC 539.³⁰ The same procedures as used in SIC 533 were used for selection of the employees sampled. (See Table III, APPENDIX H)

A total of 672 non-supervisory level and 175 supervisory level questionnaires were distributed to all strata.

²⁹One firm of the original ten selected in SIC 533 from the master list of firms dated July, 1965, was no longer in operation. One firm declined to cooperate in the survey. Therefore, the next firms on the random order list were selected.

³⁰One firm of the original 15 selected in SIC 539 from the master list of firms dated July, 1965, was no longer in operation. Two firms were scratched because they employed no personnel at the time the sample was taken. One firm agreed to participate, but after the questionnaires remained on the employer's desk during four days the interviewer picked them up on his second follow-up call. In each case the next firm on the random order list was selected.

Returns were checked off on the original distribution list. Follow-up procedures were pursued by the in-store coordinators.

Returns

Six hundred, eighty-eight (81 per cent) of the questionnaires distributed were returned. (See Table III, APPENDIX H)

Seventy-nine of the returned questionnaires were unusable.

NUMBERS AND PER CENTS OF QUESTIONNAIRES DISTRIBUTED AND RETURNED (BY STANDARD INDUSTRIAL CLASSIFICATION)*

	Non-Supervisor		Supervisor			Total	
	No. Distributed	Returned # %	No. Distributed	Returned # %	No. Distributed	Returned # %	
SIC 531	562	440 .78	146	114 .78	708	554 .78	
SIC 533	48	46 .95	11	11 1.00	59	57 .97	
SIC 539	62	59 .95	18	18 1.00	80	77 .96	
TOTAL	672	545 .81	175	143 .82	847	688 .81	
less non-usable returns		61		18		79	
TOTAL	672	484 .72	175	125 .71	847	609 .72	

*Abstracted from Table III, Appendix H.

Twelve non-supervisory level (white) forms were not usable because the respondent met the three criteria that were selected to define a supervisor. Similarly, one supervisory level (blue) questionnaire was eliminated because the respondent could not meet the criteria as a supervisor. Since only those responses in the five major task areas common to both categories would be usable, the thirteen returns were withdrawn from the sample and segregated for separate analysis outside the context of this study.

Thirty-seven employee and twelve supervisory returns were by individuals not in the merchandising division. The orientation of the questionnaire to the major tasks normally performed in the merchandising division precluded all but sporadic responses by these subjects. The majority were office and food service personnel.

A total of 609 (72 per cent) usable forms are the basis for the findings that follow.

RESULTS

Basic data on the tasks performed by general merchandise retail personnel are presented in Table IV and Appendix I. These frequency counts and percentages are abstracted from the initial computer runs of the questionnaire responses. Only limited analysis of the data has been made. Further detailed analysis of the findings of the study will await completion of the knowledge assessment now in progress.

Facts presented in Appendix I provide a profile of the workers in terms of occupational training, education, sex, age, experience in present occupation, job mobility, emphasis of high school study and groupings of major tasks performed. Data shows variations in the frequency with which supervisory and non-supervisory employees commonly perform major types of retailing tasks in three classifications of stores. This information will be useful in identification of knowledges most likely to provide bases for training and career-long advancement.

TABLE IV

PERCENTAGES OF EMPLOYEE AND SUPERVISORY RESPONDENTS REPORTING PERFORMANCE OF TASKS BY STANDARD INDUSTRIAL CLASSIFICATION IN THE GENERAL MERCHANDISE RETAIL FIELD (JUNE, 1966)

SELLING	NON-SUPERVISOR				SUPERVISOR			
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16
	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %
1. Greet the customer and determine wants and needs	372 95	33 87	54 98	459 95	434 90	531* 95	533* 95	539* 95
2. Package merchandise	315 81	27 71	42 76	384 79	435 90	531* 90	533* 90	539* 90
3. Direct customers to other departments and work interdepartmental sales	313 80	30 79	48 87	391 81	234 48	531* 48	533* 48	539* 48
4. Help customer handle or try on merchandise	320 82	31 82	45 82	396 82	333 69	531* 69	533* 69	539* 69
5. Determine amounts of credit charges or layaway charges	188 48	18 47	34 62	240 50	395 82	531* 82	533* 82	539* 82
6. Receive stock from supplies or delivery man	229 59	27 71	43 78	299 62	150 31	531* 31	533* 31	539* 31
7. Hear and handle complaints or refer to supervisor	352 90	31 82	51 93	434 90	222 46	531* 46	533* 46	539* 46
8. Suggest additional or related items for sale	351 90	32 84	52 95	435 90	178 37	531* 37	533* 37	539* 37
9. Fill out mail orders and catalog orders	208 53	9 24	17 31	234 48	356 74	531* 74	533* 74	539* 74
10. Use company advertising in selling	270 69	23 61	40 73	333 69				
11. Take phone orders and sell by telephone	342 88	16 42	37 67	395 82				
12. Make written forms and reports to supervisor	114 29	12 32	24 44	150 31				
13. Train new sales people	177 45	16 42	29 53	222 46				
14. Prepare daily report forms	153 39	10 26	15 27	178 37				
15. Explain care of merchandise and demonstrate its uses	291 74	22 58	43 78	356 74				

*SIC 531, Department Store; SIC 533, Limited Price Variety Store; SIC 539, General Merchandise Store.

Note: All percentages are rounded to the nearest whole per cent.

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR			
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16
	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %
16. Prepare merchandise for layaway	287	73	29	76	38	69	354	73
17. Translate product knowledge into customer benefits	319	82	33	74	45	82	392	81
18. Write merchandise return tickets	307	79	21	55	42	76	370	76
19. Return merchandise to its proper place in stock	336	86	29	76	51	93	416	86
20. Replenish floor stock from reserve stock	329	84	32	84	50	91	411	85
21. Write up orders for routine reorders of merchandise from basic stock list	140	36	26	68	29	53	195	40
22. Supervise sales personnel	99	25	5	13	19	35	123	25
23. Arrange stock in selling area and keep record of amounts and variety on hand	257	66	28	74	40	73	325	67
24. Study literature relating to a product	329	84	27	71	46	84	402	83
25. Approve and accept checks	214	55	22	58	48	87	284	59
26. Evaluate customers' wants and needs	347	89	28	74	50	91	425	88
27. Serve more than one customer at a time during rush periods	339	87	29	76	54	98	422	87
28. Follow up of sales to insure customer satisfaction and sell additional items	309	79	28	74	47	86	384	79
29. Cover counters and garments at night	47	12	7	18	17	31	71	15
30. Demonstrate merchandise	240	61	19	50	40	73	299	62
31. Point out hidden values of merchandise	331	85	29	76	48	87	408	84
32. Keep customer records in order to build up a clientele or following	180	46	7	18	21	38	208	43
33. Use trade-ups with customers	225	58	26	68	22	40	273	56
34. Gift wrap packages	152	39	17	45	14	26	183	38
35. Use sales register and handle monies	341	87	37	84	52	95	425	88
36. Process merchandise returns and exchanges	304	78	27	71	50	91	381	79
37. Reticket merchandise	251	64	29	76	51	93	331	68

TABLE IV (Continued)

NON-SUPERVISOR
 N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 N = 10 N = 16

SUPERVISOR

	531*	533*	539*	Total	Total	531*	533*	539*	Total
	#	#	#	#	#	#	#	#	#
38. Schedule hours and duties of other salespeople	48	4	13	65	13				
39. Assist customers in decision making	356	33	52	441	91				
40. Write sales tickets	342	28	50	420	87				
41. Confer with supervisor on selling problems	331	28	49	408	84				
42. Use a variety of techniques to close sales	326	26	42	394	81				
43. Count and record till and deposit money with cashier	287	24	27	338	70				
44. Maintain stock control records	148	13	20	181	37				
45. Make competitive shopping trips to other stores	124	14	21	159	33				
46. Check stock for damaged or soiled merchandise	293	31	45	369	76				
47. Construct departmental merchandise display	192	21	38	251	52				
48. Relate company policies to all decisions	324	28	39	391	81				
49. Rotate stock to keep first-in merchandise in prime selling position	300	30	46	376	78				
50. Order and replenish departmental supplies	210	23	33	266	55				
51. Keep counters and fixtures clean and in order	345	33	51	429	87				
KEEPING AND COUNTING STOCK									
52. Keep counters and display fixtures clean and attractive	331	33	50	414	86				
53. Arrange for counting	295	30	47	372	77				
54. Inform responsible person when stocks are low	335	32	51	418	86				



TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR			
	N = 391	N = 38	N = 55	N = 181	N = 125	N = 99	N = 10	N = 16
	531* #	533* #	539* #	Total #	Total #	531* #	533* #	539* #
55. Arrange understock and reserve stock	275	31	45	351	73			
56. Re-mark merchandise for special sales events	191	27	47	265	55			
57. Prepare rejected merchandise for return to supplier	179	16	39	234	48			
58. Unpack and assemble merchandise	236	18	47	301	62			
59. Record price of item on proper type ticket	177	20	45	242	50			
60. Record sales on unit control records	117	6	19	142	29			
61. Arrange selling stock	313	29	47	389	80			
62. Prominently display volume sellers at key traffic points	267	21	38	326	67			
63. Multiply and extend figures	164	16	30	210	43			
64. Correspond with suppliers about adjustments on merchandise received	54	6	27	87	18			
65. Prepare stock reports for management	117	12	29	158	33			
66. Prepare merchandise for sales floor	231	19	45	296	62			
67. Maintain stock control cards	83	11	18	112	23			
68. Keep stock neatly arranged and in order	322	32	50	404	84			
69. Keep older merchandise moved to front of selling stock	277	33	45	355	73			
70. Add long columns of figures	238	20	39	297	61			
71. Handle computer punch tickets	48	9	2	60	12			
72. Collect information, obtain fact and iders, and present them in clear, logical order	140	16	30	186	38			
73. Schedule stock counts	76	9	19	104	22			
74. Count and record stock	255	22	36	313	65			
75. Fill salesmen's order for stock for delivery	62	7	18	87	18			
76. Replenish selling stock from reserve stock	291	29	47	370	76			



TABLE IV (Continued)

NON-SUPERVISOR N = 391 N = 38 N = 55 N = 125 N = 99 N = 10 N = 16
 SUPERVISOR

	531* #	533* #	539* #	Total #	531* #	533* #	539* #	Total #	Total #
77. Deliver packaged merchandise to store exit for customer pickup	171	44	10	23	34	62	215	44	539*
78. Order special merchandise from catalog	122	31	13	34	29	53	164	34	533*
OPERATING CHECKSTAND AND SALES REGISTER									
79. Greet customers	339	87	31	82	54	98	424	88	
80. Record charge sales	294	75	16	42	44	80	354	73	
81. Package merchandise	309	79	30	79	50	91	389	80	
82. Figure daily sales register tally	254	65	16	42	20	36	290	60	
83. Prepare technical reports	61	16	6	16	12	22	79	16	
84. Use communications equipment: telephone, teletype, dictation equipment, loudspeaker, etc.	270	69	18	47	48	87	336	69	
85. Receive checks from customers	322	82	22	58	50	91	394	81	
86. Accept and process merchandise returned by customers	298	76	27	71	50	91	375	78	
87. Record stock numbers of items sold on the sales register	114	29	8	21	21	38	143	30	
88. Record cash sales	248	63	20	53	34	62	302	62	
89. Record C.O.D. sales	216	55	4	11	23	42	243	50	
90. Handle received on account and paid out transactions	109	28	10	26	34	62	153	32	
91. Handle split tickets, punched tickets, and other unit control inventory devices	123	32	15	40	10	18	148	31	
92. Make change	325	83	30	79	50	91	405	84	
93. Use charge plates	336	86	13	34	40	73	389	80	



TABLE IV (Continued)

NON-SUPERVISOR

SUPERVISOR

N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 N = 10 N = 16

	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %
94. Gift wrap merchandise	145 37	16 42	16 29	177 37				
95. Check out register at end of day	283 72	21 55	25 46	329 68				
96. Replace sales register tapes	246 63	30 79	38 69	314 65				
97. Get credit department approval on non-routine credit purchases	308 79	16 42	42 76	366 76				
RECEIVING, CHECKING, AND MARKING MERCHANDISE								
98. Receive merchandise from delivery men and common carriers	121 31	17 45	45 82	183 38				
99. Ticket merchandise	125 32	22 58	48 87	195 40				
100. Distribute merchandise to selling floor and reserve stockroom	150 38	15 40	45 82	210 43				
101. Process packing lists	39 10	6 16	29 53	74 15				
102. Work with fractions, decimals, and percentages in determining prices to be marked on merchandise	65 17	15 40	34 62	114 24				
103. Count merchandise and compare it with invoice and buyer's order to insure agreement as to quality, color, size, and style	126 32	16 42	45 82	187 39				
104. Unpack merchandise	173 44	17 45	49 89	239 49				
105. Check condition of merchandise received	196 50	19 50	46 84	261 54				
106. Prepare merchandise for delivery to selling floor	95 24	13 34	46 84	154 32				
107. Correspond with suppliers concerning returns and adjustments	46 12	8 21	26 47	80 17				
108. Prepare right type of ticket with necessary information for each item received	76 19	13 34	37 67	126 26				

TABLE IV (Continued)

NOV-SUPERVISOR N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 N = 10 N = 16
 SUPERVISOR

	531* #	531* %	533* #	533* %	539* #	539* %	Total #	Total %	Total #	Total %	531* #	531* %	533* #	533* %	539* #	539* %	
109. Prepare insurance forms on damaged merchandise received	7	2	4	11	9	16	20	4									
110. Report incorrect orders and damaged stock to supervisor	174	45	19	50	40	73	233	48									
111. Keep receiving room tools and equipment in order	30	8	9	24	31	56	70	15									
112. Mark tickets using store's coding systems for prices, stock numbers, and dating	75	19	13	34	37	67	125	26									
113. Keep receiving room clean and orderly	29	7	5	13	32	58	66	14									
114. Determine price to be marked on merchandise from buyer's or merchandise manager's information	53	14	13	34	35	64	101	21									
DELIVERY																	
115. Prepare delivery sales tickets	178	46	6	16	20	36	204	42									
116. Figure delivery dates from schedules	121	31	4	11	16	29	141	29									
117. Install delivered goods in home	5	1	2	5	4	7	11	2									
118. Suggest additional related purchases when delivering goods	35	9	6	16	6	11	47	10									
119. Collect on C.O.D. delivery	19	5	2	5	9	16	30	6									
120. Figure postage rates	168	43	2	5	13	24	183	38									
121. Fill in standardized delivery forms	139	36	6	16	15	27	160	33									
122. Prepare and record C.O.D. sales	174	45	3	8	18	33	195	40									
123. Figure delivery cost from schedules	127	33	2	5	14	26	143	30									
124. Figure least expensive routing and carrier on deliveries	45	12	1	3	12	22	58	12									



TABLE IV (Continued)

	NON-SUPERVISOR					SUPERVISOR				
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16		
	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %		
125. Package merchandise and take to delivery department	160 41	7 18	24 43	191 40	56 70	60 61	1 10	9 56		
KEEPING ACCOUNTS AND RECORDS										
126. Keep customer credit records of charges and payments	18 5	7 18	19 35	44 9	15 12	4 40	7 44	4 4		
127. Prepare sales register stock control tapes for transmittal to computer center	22 6	2 5	5 9	29 6	10 12	0 0	2 13	10 10		
128. Compute payroll	11 3	2 5	7 13	20 4	26 33	5 50	8 50	20 20		
129. Prepare daily sales sheets by department or employee	76 19	2 5	13 24	91 19	61 76	2 20	7 44	67 68		
130. Keep records and copies of store advertisements	38 10	0 0	14 26	52 11	36 70	3 30	10 63	57 58		
131. Read and apply tax controls	168 43	17 45	31 56	216 45	50 63	6 60	9 56	48 49		
132. Record daily sales unit control forms	75 19	3 8	11 20	89 18	52 65	5 50	8 50	52 53		
133. Collect information and prepare reports in clear, logical manner	52 13	5 13	17 31	74 15	65 81	64 65	7 70	10 63		
134. Record and report federal and state taxes	38 10	6 16	11 20	55 11	15 19	9 9	5 50	5 31		
135. Record stock count information in proper book	103 26	13 34	17 31	133 28	74 93	75 76	6 60	12 75		
136. Figure withholding tax and other deductions	21 5	5 13	9 16	35 7	10 13	4 4	4 40	5 31		
137. Record inventory records in proper form	70 18	7 18	18 33	95 20	65 81	62 65	7 70	12 75		
138. Take and file customer credit applications and references	29 7	4 11	21 38	54 11	13 16	8 8	2 20	6 38		

TABLE IV (Continued)

	NON-SUPERVISOR					SUPERVISOR						
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16				
	531* #	533* #	539* #	Total #	Total #	531* #	533* #	539* #	Total #	531* #	533* #	539* #
139. Prepare key punched stock control tickets for transmittal to supplier	16	2	2	20	4	16	20		16	16	4	0
140. Record receipts and payment in proper amounts	34	5	20	59	12	9	20		9	9	3	6
141. Record invoice information in proper record forms	28	4	20	52	11	24	42		24	24	5	13
142. Record time clock data on payroll forms	17	2	4	23	5	26	37		26	26	3	8
143. Record sales register tapes	40	3	12	55	11	32	45		32	32	5	8
144. Keep current files of invoices and purchase orders	35	3	19	57	12	61	82		61	62	7	14
145. Use communications equipment: telephone, teletype, dictation equipment, etc.	172	16	38	226	47	83	103		83	84	6	14
COMPUTING INFORMATION USING MATHEMATICS SKILLS												
146. Figure fractions and decimals	91	23	18	142	29	70	86		69	70	5	14
147. Use transportation costs and terms of sale in computing costs of merchandise	35	9	16	53	11	61	77		61	62	6	10
148. Work with percentages	12	21	19	136	28	83	106		83	84	7	16
149. Use accounting system based on retail price	19	5	19	40	8	58	69		58	59	4	7
150. Figure gross margin percentages	22	6	13	35	7	61	79		61	62	6	12
151. Use transportation rate schedule	51	13	9	61	13	37	45		37	37	4	4
152. Analyze charts and graphs	16	4	10	27	6	45	51		45	46	2	4

TABLE IV (Continued)

NON-SUPERVISOR N = 391 n = 38 n = 55 SUPERVISOR N = 16

	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #	Total #	Total %	
153. Figure discounts and datings	114	29	13	34	29	53	156	33	54	68	
154. Compute factors which affect gross margin	12	3	1	3	12	22	25	5	55	69	
155. Calculate turnover rate	14	4	2	5	13	24	29	6	61	76	
156. Compute stock to sales ratios	17	4	0	0	10	18	27	6	56	70	
157. Figure cash and trade discounts	65	17	8	21	17	31	90	19	42	53	
158. Compute open to buy	17	4	0	0	8	15	25	5	50	63	
159. Use formulas for markup and markdown	36	9	6	16	19	35	61	13	74	92	
PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS											
160. Clean the store windows	14	4	7	18	29	53	50	10	10	12	
161. Prepare or assemble items for display	131	34	20	53	42	76	193	40	78	97	
162. Set up departmental displays of sales items	166	43	19	50	38	69	223	46	85	106	
163. Select appropriate theme, color scheme, and type of fixture	70	18	12	32	24	44	106	22	54	68	
164. Train display personnel	7	2	1	3	2	16	17	4	10	13	
165. Schedule displays for department	24	6	2	5	17	31	43	9	61	76	
166. Gather merchandise for use in displays, keep records of the items, and return to stock	87	22	11	29	12	46	123	25	66	82	
167. Make selling displays	133	34	19	50	37	67	189	39	79	99	
168. Dismantle displays and return merchandise to stock	131	34	18	47	37	67	186	38	58	72	
169. Coordinate pieces and accessorize merchandise to be displayed	100	28	16	42	30	55	156	32	73	91	
170. Plan seasonal display themes	57	15	9	24	20	36	86	18	51	64	

TABLE IV (Continued)

NON-SUPERVISOR N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 SUPERVISOR N = 10 N = 16

	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	535* # %	539* # %
171. Select time and place for each display	44 11	11 29	22 40	77 16	57 71	55 56	5 50	11 69
172. Dress mannequins for display	64 16	11 29	18 33	93 19	33 41	31 31	4 40	6 38
173. Make departmental signs	32 8	12 32	28 51	72 15	48 60	43 43	3 30	14 88
174. Put up interior store decorations	22 6	13 34	26 47	61 13	23 29	14 14	5 50	10 63
175. Coordinate displays of advertised end featured merchandise	92 24	13 34	29 53	134 28	69 86	66 67	6 60	14 88
176. Purchase supplies for displays	12 3	5 13	17 31	34 7	12 15	5 5	2 20	8 50
177. Develop a display budget	4 1	1 3	7 13	12 3	4 5	2 2	2 20	1 6
178. Design layout of each display	12 3	3 8	17 31	32 7	11 14	7 7	3 30	4 25
179. Make background pieces	14 4	6 16	15 27	35 7	7 9	3 3	3 30	3 19
180. Trim show windows and set up displays	18 5	4 11	19 35	41 9	11 14	5 5	3 30	6 38
181. Dress showcase	55 14	4 11	18 33	77 16	26 33	24 24	3 30	6 38
182. Cover displays at night	15 4	3 8	15 27	33 7	6 8	5 5	0 0	3 18
183. Use and service display equipment (mannequins, sign holders, sign printers, staplers, saws, paint equipment, etc.)	51 13	12 32	28 51	91 19	41 33	28 28	5 50	8 50
184. Determine consumer demand for store's products	36 9	6 16	16 29	56 12	66 66	51 22	6 60	9 56
185. Secure or prepare illustrations	11 3	1 3	13 24	25 5	22 28	18 18	4 40	6 38
186. Write headlines	5 1	0 0	5 9	10 2	18 23	18 18	0 0	5 31
187. Write radio copy	1 0	0 0	1 2	2 0	3 3	2 2	0 0	1 6
188. Coordinate displays and advertisements	34 9	3 8	15 27	52 11	66 83	69 70	5 50	9 56

PLANNING, PREPARING, AND PLACING ADVERTISEMENTS

TABLE IV (Continued)

NON-SUPERVISOR N = 38 N = 55 N = 48 N = 125 N = 99 SUPERVISOR N = 10 N = 16

	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #	Total #	Total %
189. Evaluate effectiveness of ads in terms of sales	34	4	22	60	12	72	90	75	76	5	50	10	63		
190. Plan institutional form for ads designed to establish a store image	4	0	3	7	1	12	15	10	10	1	10	4	25		
191. Write newspaper copy	9	0	5	14	3	27	34	25	25	2	20	7	44		
192. Use other store display and selling areas in conjunction with advertising	26	5	14	45	9	38	47	36	36	2	20	9	56		
193. Supervise work of other employees	20	5	16	37	8	58	73	55	56	7	70	11	69		
194. Prepare advertising budget	6	0	4	8	2	12	15	11	11	1	10	3	19		
195. Price advertising in various media	5	0	6	11	2	25	32	24	24	2	20	6	38		
196. Proofread ads	28	7	8	37	8	69	86	70	71	4	40	12	75		
197. Use telephone to advertise	33	8	7	41	9	7	9	7	7	1	10	1	6		
198. Train other advertising personnel	1	0	1	2	0	6	8	3	3	1	10	1	25		
199. Plan advertising program and schedule	10	3	4	14	3	38	48	41	41	2	20	5	21		
200. Make basic layout plans	11	3	7	19	4	28	31	22	22	2	20	7	44		
201. Use commercial mat services	7	0	5	12	3	16	20	14	14	2	20	4	25		
202. Use various type styles in copy	6	0	3	9	2	10	12	6	6	1	10	5	31		
203. Take advertising copy to media for preparation of proof copies	5	1	3	8	2	18	23	17	17	3	30	3	19		
204. Keep copies of all ads	32	0	10	8	9	53	66	54	55	3	30	9	56		
BUYING MERCHANDISE FOR RESALE															
205. Determine customer demand	114	29	15	158	33										
206. Analyze selling or operating cost for department, salesperson, line of merchandise, etc.	14	4	3	8	5										
207. Establish price lines for department and prices for individual items	17	4	4	11	7										

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR				
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16	
	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #	
208. Make decisions on hiring, promoting, or firing employees	12	2	7	21	4				
209. Negotiate with vendors on terms and discount procedures	13	2	10	25	5				
210. Compute open to buy amount by department and smaller units	7	0	8	15	3				
211. Go to vendors' shows or to market to make buying decisions	26	1	12	39	8				
212. Shop competitive stores	73	10	19	102	21				
PRICING MERCHANDISE									
213. Determine what factors affect your gross margin	18	1	15	34	7				
214. Determine rate of turnover for item, line, or department and apply results to store situation	25	5	18	48	10				
215. Evaluate and determine rate or amount of trade-ins and premiums on various items	10	1	7	18	4				
216. Apply factors of how the price affects the consumer to the pricing of items	17	3	16	36	7				
217. Use the store's pricing policies in determining price of a product	29	9	30	68	14				
218. Determine markup and markdown	34	8	29	71	15				

TABLE IV (Continued)

531* N = 391 533* N = 38 539* N = 55 Total N = 484 531* N = 99 533* N = 10 539* N = 16

	531*	533*	539*	Total	531*	533*	539*	Total	531*	533*	539*
	#	#	#	#	#	#	#	#	#	#	#
219.	6	5	10	35	7						
220.	9	11	14	52	11						
221.	10	8	13	50	15						
222.	3	3	3	21	4						
223.	4	3	9	27	6						
224.	3	0	7	18	4						
225.	10	8	14	55	11						
226.								83	104	85	86
227.								58	72	63	64
228.								84	105	84	85
229.								50	62	48	49
230.								64	80	65	66
231.								87	109	90	91
232.								89	111	91	92
233.								92	115	91	92
234.								90	113	92	93
235.								93	118	93	94
236.								88	110	88	89

CONTROLLING MERCHANDISE

- 219. Forecast sales for a season/year
- 220. Schedule and conduct inventories
- 221. Match inventory to customer demand
- 222. Determine departmental operating costs or selling costs
- 223. Compute and use turnover figures
- 224. Estimate expenses and price reductions for a season/year
- 225. Use various inventory control systems

BUYING MERCHANDISE FOR RESALE

- 226. Determine customer demand
- 227. Analyze selling or operating cost for department, salesperson, line of merchandise, etc.
- 228. Communicate with supplier about returns or adjustments on purchases
- 229. Select buying sources
- 230. Establish price lines for department and prices for individual items
- 231. Handle employee complaints
- 232. Keep up on current trends in buying and styles
- 233. Sell on floor
- 234. Instruct salespeople in new merchandise information
- 235. Supervise salespeople
- 236. Train new salespeople and stock people

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR			
	531* #	533* #	539* #	Total #	531* #	533* #	539* #	Total #
237. Make routine purchase order decisions, i.e., route, type transport, delivery schedule, dating, amounts	73	91	72	73	5	14	88	102
238. Determine markdowns	82	103	82	83	6	15	94	120
239. Make decisions on hiring, promoting, or firing employees	62	78	64	65	5	9	56	87
240. Select and/or buy merchandise for special promotions	67	84	69	70	4	11	69	94
241. Negotiate with vendors on terms and discount procedures	50	62	47	48	3	12	75	105
242. Establish merchandise dating procedure	32	40	29	30	4	7	44	73
243. Make routine reports on employee effectiveness to personnel manager	68	85	74	75	2	9	56	92
244. Use manufacturers' semi-automated price ticket stock count and reorder process on basic stock	41	51	40	40	4	7	44	86
245. Use middlemen in some purchases	57	71	55	56	3	13	81	111
246. Set advertising schedule and budget	33	41	33	33	3	5	31	67
247. Compute open to buy amount by department and smaller units	46	57	53	54	1	3	19	67
248. Keep and invoice inventory control	50	62	52	53	3	7	44	87
249. Go to vendors' shows or to market to make buying decisions	58	72	59	60	3	10	63	95
250. Schedule special promotions	49	61	49	50	3	9	56	88
251. Prepare Purchase Orders with transportation rates and schedules	45	61	49	50	3	9	56	88
252. Plan layout of merchandise	74	93	76	77	4	13	81	114

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR			
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16
	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #
253. Make decisions on customer returns and allowances					91	92	7	15
254. Set up basic stock schedules for department and set reorder procedure on basic stock					67	70	5	9
255. Establish code system for marking merchandise					24	23	2	5
256. Order from catalogs					54	50	5	12
257. Figure turnover rates by department and by individual items					48	53	2	5
258. Supervise inventories					88	91	6	13
259. Schedule buying and delivery dates					62	64	5	8
260. Shop competitive stores					86	91	3	13
261. Schedule employees' work week					78	81	6	10
262. Figure stock to sales ratio					55	59	4	6
263. Maintain and use a unit control system on special merchandise					66	72	3	8
264. Communicate with vendors about adjustments or returns on incorrect orders					82	82	6	15
265. Make decisions on quantities, styles, varieties, etc. to buy					81	81	6	14
266. Communicate with insurance companies on claims and adjustments					14	5	4	9
267. Develop advertising plans					41	43	3	5

TABLE IV (Continued)

	NON-SUPERVISOR					SUPERVISOR						
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16				
	531* #	533* #	539* #	Total #	Total %	531* #	533* #	539* #	Total %	531* #	533* #	539* #
268. Determine department, line, and item markup percentages				59	74	62	61	5	50	8	50	8
PRICING MERCHANDISE												
269. Use federal and state laws that apply to pricing goods when establishing initial prices				41	51	38	38	5	50	8	50	8
270. Determine what factors affect your gross margin				65	81	66	67	5	50	10	63	10
271. Use the law of supply and demand in determining initial markup				50	63	49	50	5	50	9	56	9
272. Work with decimals, fractions and percentages in establishing prices				72	90	70	71	5	50	15	94	15
273. Consider the costs involved in determining a price for an item				73	91	73	74	5	50	13	81	13
274. Employ the use of elastic and in-elastic demand in pricing decisions				42	52	40	40	4	40	8	50	8
275. Determine the cost of merchandise sold				60	75	56	57	6	60	13	81	13
276. Determine rate of turnover for item, line or department and apply results to store situation				57	71	56	57	5	50	10	63	10
277. Use coding systems in premarking merchandise				37	46	32	32	5	50	9	56	9
278. Evaluate and determine rate or amount of trade-ins and premiums on various items				15	19	15	15	2	20	2	13	2

TABLE IV (Continued)

NON-SUPERVISOR
 N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 N = 10 N = 16

	531*		533*		539*		Total		531*		533*		539*	
	#	%	#	%	#	%	#	%	#	%	#	%	#	%
279. Analyze the use of trading stamps and their effect on the item's price							5	6	4	4	2	20	0	0
280. Use loss leaders in your promotion and sales policies							27	34	20	20	4	40	10	63
281. Apply factors of how the price affects the consumer to the pricing of items							44	55	43	43	3	30	9	56
282. Use the store's pricing policies in determining price of a good							80	100	82	83	5	50	13	81
283. Determine markup and markdown							75	94	76	77	6	60	12	75
284. Use the principles of monopoly pricing, competitive pricing, judgment pricing, and price lining							54	67	53	54	5	50	9	56
285. Use manufacturers' pre-priced merchandise in determining prices							65	81	65	66	5	50	11	69
286. Use markup and markdown formulas							71	89	77	78	3	30	9	56
287. Figure open to buy							49	61	55	56	1	10	5	31
CONTROLLING MERCHANDISE														
288. Forecast sales for a season/year							60	75	64	65	5	50	6	38
289. Determine current sales trends							70	88	72	73	6	60	10	63
290. Use computers in figuring and analyzing inventory							9	11	9	9	1	10	1	6
291. Schedule and conduct inventories							73	91	77	78	7	70	7	44

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR				
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16	
	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %	
292. Match inventory to customer demand					65	81	67	4	10
293. Use ratios in determining selling cost factors					44	55	48	3	4
294. Employ a pattern for the placement of merchandise on shelves					80	100	82	6	12
295. Determine open to buy					50	62	54	3	5
296. Make sales forecasts (based on multiple control factors)					44	55	47	3	5
297. Maintain open to buy records					50	63	57	3	3
298. Use purchase request forms					62	78	66	3	9
299. Maintain adequate inventory of most-wanted stock items					86	108	86	7	15
300. Use split ticket system for reporting sales					38	48	46	2	0
301. Determine departmental operating costs or selling costs					47	59	50	2	7
302. Train stock keepers					57	72	59	4	9
303. Make up basic stock and routine reorder schedules					66	83	69	3	11
304. Compute and use turnover figures					44	55	47	2	6
305. Use unit inventory control systems including periodic and perpetual count systems					74	92	78	5	9
306. Estimate expenses and price reductions for a season/year					35	44	38	3	3

TABLE IV (Continued)

	NON-SUPERVISOR				SUPERVISOR				
	N = 391	N = 38	N = 55	N = 484	N = 125	N = 99	N = 10	N = 16	
	531* # %	533* # %	539* # %	Total # %	Total # %	531* # %	533* # %	539* # %	
307. Use dollar inventory control system					54	58	4	5	
308. Prepare computer punch tickets for transmittal to supplier or computer center					15	15	4	0	
309. Control losses through markdowns					79	82	7	10	
310. Employ a pattern for arranging selling stock, understock, reserve stock					87	88	7	14	
311. Use invoice inventory control system					45	49	2	5	
312. Prepare sales register inventory tapes for transmittal to computer center					18	19	1	2	
SELLING									
313. Complete the personal selling process					82	79	8	15	
314. Interpret store policies to customers and salespeople					95	95	8	16	
315. Supervise and train sales personnel					88	52	6	15	
316. Handle routine stockkeeping functions					88	84	10	16	
317. Operate and service the cash register					74	69	8	16	
KEEPING AND COUNTING STOCK									
318. Arrange and keep stock					86	84	9	15	

TABLE IV (Continued)

NON-SUPERVISOR SUPERVISOR

N = 391 N = 38 N = 55 N = 484 N = 125 N = 99 N = 10 N = 16

	531* #	533* #	539* #	Total #	531* #	533* #	539* #	Total #
319. Prepare stock for special sales events				87	88	89		15
320. Record sales on unit control records				60	52	63		7
321. Prepare merchandise for sales floor				79	79	80		14
322. Handle computer punch stock control tickets				26	26	26		0
323. Count and record stock				80	80	81		14
RECEIVING, CHECKING, AND MARKING MERCHANDISE								
324. Receive merchandise and prepare for pricing	34			43	22	22		15
325. Check condition of merchandise received and handle required related correspondence	62			77	54	55		15
326. Prepare price tickets with necessary information for each item received	30			37	19	19		13
327. Determine price to be marked on tickets	71			89	68	69		15
OPERATE CHECKSTAND AND SALES REGISTER								
328. Figure and record sales	78			97	74	75		16
329. Receive and approve checks or credit	88			110	87	88		16
330. Accept and process merchandise returned by customer	89			111	88	89		16
331. Keep required inventory records	77			96	78	79		13
332. Prepare information reports on the checkstand	42			52	40	40		9



DISCUSSION

The Employee Profile

The profile of general merchandise retail employees drawn from the personal data section of the questionnaire highlights several important and inter-related facts concerned with education background, sex, and job mobility of the respondents. (See APPENDIX I)

Sex

Only 18 per cent of the non-supervisory category were male, but 58 per cent of all supervisors were male. These percentages indicate that, at present, relatively few females move into supervisory positions.

Education

Movement into the supervisory category of employment generally is facilitated by formal education beyond high school. Fifty-nine per cent of all supervisors have more than twelve years of education. Thirty-eight per cent of the supervisors have sixteen or more years of education.

Since the ultimate purpose of the study is to provide bases for planning distributive education curriculum, it is important to note that 16.8 per cent of the supervisory category had completed the thirteenth and fourteenth year. This implies that post-secondary schools have opportunity to play major roles in preparation of youth and adults for supervisory positions.

Job Mobility

The data indicate that, at present, relatively few non-supervisory personnel move from one type of work to another within firms and that relatively few move from one firm to another. Seventy-four per cent of the non-supervisory personnel had never transferred from one job to another within a firm and 85 per cent had transferred only one time or not at all.

Mobility of supervisors from one type of work to another within the firm generally appears to be associated with in-firm training programs. Eleven per cent of the supervisors had not transferred within

the firm, 30 per cent had transferred once, 19 per cent twice and 19 per cent three times. Sixty-nine per cent of the supervisors had participated in one or more on-the-job management training programs.

Major Tasks Performed

Substantial percentages of non-supervisory employees indicated selling, stockkeeping, cashiering, receiving, display, and record keeping were major tasks within their job. Substantial percentages of supervisors indicated that they performed all of the above tasks plus advertising, pricing, buying, and controlling. Consequently, identification of knowledge clusters associated with performance of those combinations of tasks is an important element of curricula design.

The Task Analysis

Table V, Appendix J, shows the per cent of respondents performing each specific task. Activities performed by less than 20 per cent of the sample will not be considered in further identification of types and levels of knowledge essential for task performance. We feel that future curriculum development within this project should be limited to the types of activities performed by substantial percentages of retail employees.

Substantial percentages of both categories of employees do selling, keeping and counting stock and operating the checkstand and sales register. These tasks are common to the great majority of retail employees. Smaller percentages of all employees receive, check and mark merchandise, handle some in-store activities associated with delivery, and perform some activities associated with interior and window display. All the other major tasks studied are primarily performed by supervisory personnel in the merchandising division of the general merchandise retail store. The tasks of buying, pricing, and controlling merchandise are unique to the supervisors in all strata of stores.

The relatively small numbers within the sample who responded to the activities in display and adver-

tising might indicate these activities are performed by specialists. The persistently low percentage of "yes" responses by non-supervisory personnel to the advertising activities indicates performance of this task is not a consistent part of their job requirement. Where supervisors indicate substantial percentage of performance of the activities (item numbers 184, 188, 189, 192, 196, 199 and 204) the primary function is coordinating the advertising with the in-store selling program. Those activities associated with preparing and placing advertisements are not performed by substantial percentages of either supervisory or non-supervisory personnel. It is concluded that the technical aspects of preparing and placing advertisements are performed by specialists within the firm or in a commercial agency.

Only three of the associated activities in the major task, computing information using mathematics skills, were performed by over 20 per cent of the non-supervisory personnel. They are number 146, figure fractions and decimals (29 per cent), number 148, work with percentages (28 per cent), and number 153, figure discounts and dating (33 per cent). All others associated activities in this major task were performed by less than 14 per cent of the non-supervisory respondents. These three associated activities combine in the hierarchy of mathematics skills to indicate using fractions, decimals and percentages to figure discounts is an essential part of non-supervisory task performance. These types of mathematics skills were also identified as essential to work in the other vocational fields studied by this project.

Major percentages of supervisors performed all activities in the tasks of computing information using mathematics skills. Skill in performance of this major task is, therefore, an essential criteria for retailing jobs at a supervisory level. On the contrary, limited use of mathematics skills is made at the non-supervisory level.

Only four of the associated activities in the major task of keeping accounts and records were performed by over 20 per cent of non-supervisory personnel. They

were number 131, read and apply tax charts (45 per cent), number 135, record stock count information in proper book (28 per cent), number 137, record inventory records in proper forms (20 per cent), and number 145, use communications equipment: telephone, teletype, dictation equipment, etc. (47 per cent). Major percentages of supervisors performed the record keeping functions in the merchandising division. In the smaller general merchandise stores substantially larger percentages of non-supervisory personnel performed the record keeping function than in the department stores or variety stores.

Substantial percentages of both supervisory and non-supervisory personnel perform the in-store activities associated with preparing merchandise for delivery. However, a significantly larger percentage of supervisors perform these activities than do non-supervisors. Such low numbers of personnel reported performance of this task in limited price variety stores, that preparing merchandise for delivery cannot be considered a major task in the variety store.

Non-supervisory questionnaires contained control questions in the major tasks, usually performed by supervisors, of buying, pricing and controlling merchandise. Only minor percentages of non-supervisory employees indicated performance in these areas. A significantly larger percentage than expected of employees in the small general merchandise store performed these tasks, but in general, these tasks are not a part of the non-supervisory retail job.

Selected activities, usually considered non-supervisory, within the major tasks of selling, keeping and counting stock, receiving and marking merchandise and operating the checkstand and sales register were used as criterion items in the supervisory questionnaire. They were to test whether there is a difference between tasks performed by the two groups. Major percentages of both supervisory and non-supervisory personnel indicated performance of all those tasks. Within the major task of keeping and counting stock significantly larger percentages of supervisors recorded sales on unit control records, prepared mer-

chandise for the sales floor, handled computer punch stock control tickets and counted and recorded stock, than did non-supervisory personnel. Larger percentages of supervisors than non-supervisors keep inventory records and prepare information reports on the checkstand operation than do non-supervisors.

There is a greater degree of specialization in task performance in most task areas in the department and variety stores than in the general merchandise stores. This specialization is most evident in such tasks as receiving and marking merchandise, operating the checkstand, keeping accounts and records, computing information using mathematics skills, display, and advertising. A significantly larger percentage of non-supervisory personnel performed these tasks in the general merchandise store than in the other two types.

CONCLUSIONS AND RECOMMENDATIONS

Conclusions

Analysis of this data suggests discrepancy between the types of work actually done and the content of some distributive education curricula. For those students being prepared primarily for entry jobs, great emphasis on the major tasks of selling, stock-keeping, checkstand operation and the routine procedures of receiving and marking merchandise is indicated. However, to prepare students with a background most likely to assure career long advancements, some advanced education preparing them to adapt to a broad range of tasks is essential.

The data indicate there is slight chance for movement into supervisory careers in merchandising without some post secondary school preparation.

The data indicates the technical aspects of planning, preparing and placing advertisements and most display activities are performed by a limited number of in-store or commercial specialists. Curric-

ulum planning for supervisory level personnel in the sales promotion area apparently should be concerned with the functions of coordinating display and advertising activities with the in-store sales program. Since less than 20 per cent of the non-supervisory personnel reported performance of activities associated with planning, preparing and placing advertising, curricula designed for non-college bound students should orient to broad understandings of the purposes of and relationship of advertising and display to the total sales program.

In high school programs aimed at preparing non-college bound youth for entry positions in the merchandising divisions, the primary curriculum responsibility appears to be preparation of youth with the competencies to perform the selling, stockkeeping and cashiering functions. Many parts of the full range of distribution competencies, i.e. merchandising, basic skills, human relations, economics and technical content competencies, are inherent in these tasks. Data indicates that significant percentages of all merchandising employees perform these tasks. Thus, it is deemed essential to structure the distributive education curriculum to give emphasis to the types and levels of knowledge needed for proficiency in these major tasks.

Recommendations

For the second phase of our project we will:

1. Conduct a study of the types and levels of knowledge essential for performance of tasks done by substantial percentages of supervisory and non-supervisory personnel.
2. Continue analysis to identify clusters of tasks common to the wide range of occupations studied within this total project, (ERD 257-65).
3. Design distributive education curriculum at the secondary and post-secondary level based upon the

findings of the study. (A prototype of a unit of instruction on keeping and counting stock using a "systems approach" is being developed at the University of Idaho using data abstracted from this study.)

4. Make further analysis of the differences of task performance by personnel in the three SIC classifications studied.

We recommend that:

1. Similar studies be conducted in other types of retailing, wholesaling and service occupations and by other categories of employment within firms.

2. Similar studies be conducted in selected geographical locations to determine if there are regional differences in the tasks performed by non-supervisory and supervisory personnel.

3. Comparison be made between the findings of this study and existing curriculum at the high school and post high school levels.

SUMMARY

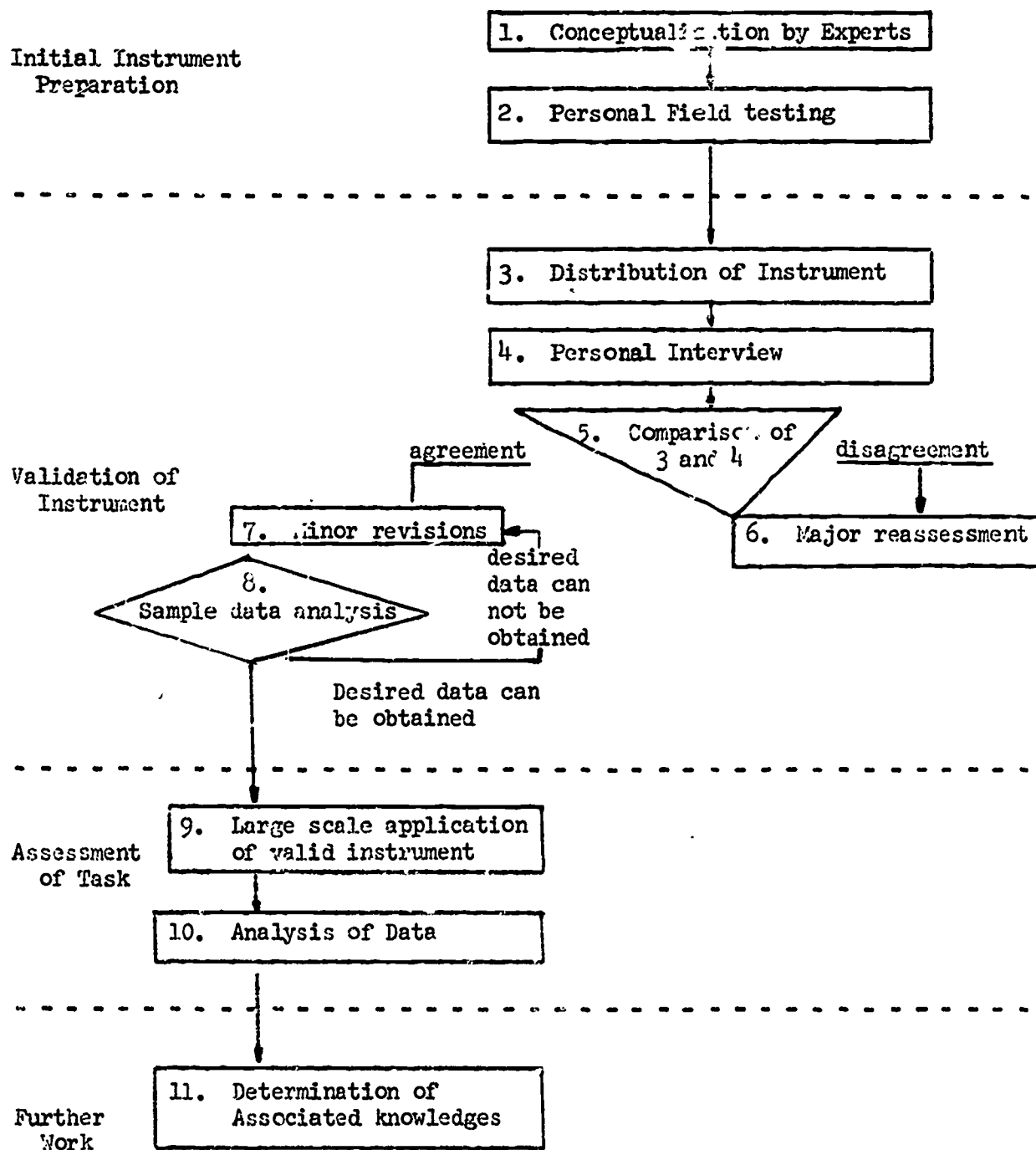
The purpose of this study was to identify major tasks performed by merchandising employees working in three Standard Industrial Classifications of retail establishments. Those classifications are department stores, variety stores and general merchandise stores. By questionnaire, facts were obtained regarding 12 categories of work performed by supervisory and non-supervisory personnel. Those categories are selling, stockkeeping, checkstand operation, receiving and marking merchandise, delivery, keeping records, computing, display, advertising, buying, pricing, and merchandise control. From collections of that data percentages of employees performing each category of work were determined. This information will be utilized as bases for identification of clusters of knowledges associated with performance of work done by substantial percentages of employees. We assume that,

along with requisite skills, acquisition of such knowledges will help pupils succeed in entry jobs and serve as bases for retraining, occupation mobility and career-long advancement.

A P P E N D I X

APPENDIX A

FLOW CHART FOR RETAIL TASK ASSESSMENT



APPENDIX B

PERCENTAGES OF STORES AND EMPLOYEES IN KING-PIERCE COUNTIES, WASHINGTON,
 COMPARED TO NATIONAL PERCENTAGES FOR SIC 531, 533, 539

SIC	Number of Stores	Percentage of Stores		Number of Employees (Aug, 1966)	Percentage of Employees	
		King Pierce	National		King Pierce	National
531	37	.16	.07	11,516	.84	.70
533	81	.35	.36	1,164	.09	.20
539	116	.49	.57	963	.07	.10
TOTAL	234			13,643		

UNIVERSITY OF IDAHO

MOSCOW, IDAHO



College of Business Administration

APPENDIX C

**DEPARTMENT OF OFFICE ADMINISTRATION
BUSINESS EDUCATION**

May 31, 1966

Manager
Seattle-Tacoma Retail Firms

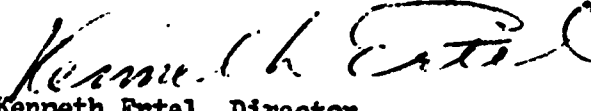
Dear Sir:

May we introduce Mr. Jack Hruska. He is acting as a professional interviewer representing the University of Idaho. We seek your cooperation in allowing Mr. Hruska to administer a questionnaire to part of your staff concerning the kind of work performed in the store which is essential for successful performance.

This interview is part of a vocational-technical education research project being conducted by the University of Idaho, Washington State University, and the U.S. Office of Education. It was developed in close cooperation with representatives of the National Retail Merchants Association and the National Variety Stores Merchants Association. It is part of a long range program designed to improve vocational education for non-college bound youth.

Please make some of your valuable employee time available to Mr. Hruska. Each questionnaire will take about fifteen to twenty minutes, yet we feel the time will have value to your firm in terms of future qualified workers.

Respectfully yours,


Kenneth Ertel, Director
Vocational-Technical Education
Research Project

KE/gs

APPENDIX D

BACKGROUND INFORMATION FOR INTERVIEWERS

THE PROJECT: The W.S.U. - Idaho vocational research project will identify the major tasks performed and the knowledges necessary for successful employment in many occupations. The common concepts identified will be used to develop units of instruction designed to prepare non-college bound youth for entry into and success in the world of work.

The retailing study is to identify the types and frequency of tasks merchandising oriented employees in the general merchandise retail field perform. Merchandising oriented employees are those whose job is directly involved with the goods, with the customer or with customer service. We exclude office, janitorial or other operation type persons since their tasks will be analyzed in another study.

THE SAMPLE: Employees and supervisors in a randomly selected sample of firms in King and Pierce counties in SIC 531 Department Store, SIC 533 Variety Store, and SIC 539 General Merchandise Store will constitute the sample.

THE INSTRUMENT: Two questionnaires have been constructed and field tested on which employees and supervisors respond about tasks they have performed in the past year.

Employees (white form) are all persons, full time or part time, who work with the merchandise or with customers directly. Supervisors (blue form) are those merchandising section employees who supervise more than two full-time employees and/or who are department heads, assistant buyers or buyers.

NEXT STAGE STUDY: (to begin December, 1966) Having identified the types and frequencies of tasks performed in modern retail operations, a small group of leading-edge retail employees will identify the knowledges essential to perform these tasks. These knowledges will be used as a basis for developing up-to-date units of instruction in distribution.

SUPPORT FOR THE STUDY: This project is funded under section 4 (c) Vocational Education Act of 1963 and is administered and conducted cooperatively by Washington State University and University of Idaho.

Advice and cooperation in its development has been received from the National Retail Merchants Association, The National Chain Store Executives Association, and the Variety Stores Executives Association. The advisory committee has representatives of each of these groups.

APPENDIX E

INSTRUCTIONS TO PERSONS DISTRIBUTING QUESTIONNAIRE

1. Go directly to the manager. He has already been told of the project by letter.
2. Get the total number of employees who are involved in merchandising. In addition, find out the total number of employees in the store. Also, obtain the total number of supervisors or operational management personnel.
3. Take a stratified random sample of 33 per cent of all employees in the department stores and 50 per cent of all employees in all other classifications of stores. A pre-selected random number is assigned on your list. Use this number to select every second or third person on the employee list.
4. Leave one white form for each employee and one blue form for each supervisor selected. Have management distribute them directly. Record the numbers of the questionnaires left, i.e., Rhodes Department Store: employee, 025-037; supervisor, 1114-1118.
5. Pilot studies have shown best returns are obtained when the instrument is distributed by management in a store meeting. Endeavor to get management to do this.
6. The next best method is for the manager to distribute them to all employees while you are still there. If they stack them on a desk, the forms will probably not be distributed. Above all, the forms must be given out directly to the employees by management.
7. If you feel the questionnaires will not get distributed, take them along and go to the next firm on the randomly selected list.
8. Use the employers list with the selected employees names to check off returned forms.
9. Return all unused forms.
10. If they will not cooperate, use the substitute firms on your list.

Example of procedure to use in recording disbursement of forms:

STORE NAME	TOTAL NUMBER EMPLOYEES IN ALL CATEGORIES	NUMBER ENGAGED IN MERCHANDISING	FORMS LEFT IN STORE			
			WHITE		BLUE	
			QUAN	NO	QUAN	NO
W. T. Grant Co.	43	26	20	20-40	6	110-115

APPENDIX F

NON-SUPERVISORY EMPLOYEES TASK SURVEY INSTRUMENT

You can help our schools give your sons and daughters the kind of education they need to earn a satisfactory income.

As you know, many changes are taking place in the kinds of work people do. Schools need up-to-date facts about exactly what kinds of work are being done. These facts will help schools provide useful training.

You have been selected to help with a nationwide study to show what actual kinds of work people in various occupations do.

The information will be strictly confidential.

Your cooperation is appreciated and will help your schools prepare young people for the future.

After you have completed the attached questionnaire, return it promptly in the enclosed self-addressed envelope. No postage is necessary.

THIS PROJECT IS SPONSORED BY:

United States Office of
Education
Washington State University
University of Idaho
Washington State Board for
Vocational Education
Idaho State Board for
Vocational Education

THE FOLLOWING GENERAL INFORMATION
WOULD BE VERY USEFUL IN THIS STUDY.

In questions 1 - 4 please fill in the blank with
the necessary information.

1. Name _____
2. Present Job Title _____
3. Name of Employing Firm _____
4. Address of Employing Firm _____
5. In which area do you work?
 - _____ 1. Building Trades
 - _____ 2. Electronics
 - _____ 3. Child Care
 - _____ 4. Food Service
 - _____ 5. Retail Sales
 - _____ 6. Office
 - _____ 7. Agriculture
6. Where did you receive your specialized occupational training?
 - _____ 1. On the job (not apprentice)
 - _____ 2. Apprentice
 - _____ 3. Military
 - _____ 4. Business College
 - _____ 5. Trade or Technical School
 - _____ 6. Correspondence
 - _____ 7. Specialized School (for example: IBM Key Punch School, Heavy Equipment School)
 - _____ 8. High School
 - _____ 9. Junior College
 - _____ 10. Self Taught
 - _____ 11. Other (please list)

In questions 7 - 11 please circle the one answer
which applies.

7. What was the highest grade of school you completed?
8 or less, 9, 10, 11, 12, 13, 14, 15, 16 or more
8. Sex. Male Female
9. Age. Under 20 20-30 31-50 Over 50
10. For how many years have you been in your present
occupation?
Less than 1 year 1-5 years More than 5 yrs.

11. How many times have you changed occupations in the past 5 years?
(For example: plumber to sheet metal worker to retail sales = 2 changes.)

0 times 1 - 2 times 3 or more times

In questions 12 - 17 please check (✓) the one answer which applies:

12. Main emphasis of high school study:

<input type="checkbox"/> 1. College Prep	<input type="checkbox"/> 4. Distributive Education
<input type="checkbox"/> 2. Vocational	<input type="checkbox"/> 5. Scientific
<input type="checkbox"/> 3. Business Education	<input type="checkbox"/> 6. None

13. Highest level of on-the-job employment training program completed:

<input type="checkbox"/> 1. Store Procedures	<input type="checkbox"/> 4. Management Training
<input type="checkbox"/> 2. Sales Training	<input type="checkbox"/> 5. None
<input type="checkbox"/> 3. Supervisory Training	

14. Number of times you have been transferred from one major task to another within this firm, i.e., stockkeeping to selling to buyer, etc.

<input type="checkbox"/> 1. None	<input type="checkbox"/> 5. 4
<input type="checkbox"/> 2. 1	<input type="checkbox"/> 6. 5 to 7
<input type="checkbox"/> 3. 2	<input type="checkbox"/> 7. 8 to 10
<input type="checkbox"/> 4. 3	<input type="checkbox"/> 8. 11 to 20

15. Number of hours worked per week:

<input type="checkbox"/> 1. Less than 20
<input type="checkbox"/> 2. 20 - 32
<input type="checkbox"/> 3. More than 32

16. How many employees do you supervise?

<input type="checkbox"/> 1. None
<input type="checkbox"/> 2. 1 - 5
<input type="checkbox"/> 3. More than 5

17. What is your direct supervisor's job title? _____

18. Check each of the following statements which apply to your major task in the store.

- | | |
|---|---|
| <input type="checkbox"/> 1. Selling | <input type="checkbox"/> 8. Record Keeping |
| <input type="checkbox"/> 2. Stockkeeping | <input type="checkbox"/> 9. Pricing |
| <input type="checkbox"/> 3. Cashiering | <input type="checkbox"/> 10. Buying |
| <input type="checkbox"/> 4. Receiving, marking
merchandise | <input type="checkbox"/> 11. Controlling
Merchandise |
| <input type="checkbox"/> 5. Display | <input type="checkbox"/> 12. Credit
Control |
| <input type="checkbox"/> 6. Advertising | <input type="checkbox"/> 13. Other |
| <input type="checkbox"/> 7. Delivery | <input type="checkbox"/> 14. Other |

INSTRUCTIONS

On the following pages is a list of tasks (activities).

Read each task listed.

If you have actually performed the task during the past two years, check (✓) the blank under "YES" which appears to the left of the item.

If you have not performed the task in the last two years, check (✓) the blank under "NO" to the left of the item.

DO NOT CHECK "YES" UNLESS YOU HAVE ACTUALLY PERFORMED THIS TASK IN THE LAST TWO (2) YEARS.

MAKE CERTAIN THAT YOU CHECK EACH ITEM EITHER "YES" OR "NO".

An example may be helpful to you:

YES NO

 Type letters (A check of "YES" indicates you have typed letters as part of your occupation in the past couple of years.)

 Drive a truck (A check of "NO" indicates you have not driven a truck as part of your occupation in the past couple of years, even though you may be able to do it.)

IF YOU HAVE PERFORMED THESE TASKS
IN YOUR OCCUPATION IN THE PAST COUPLE
OF YEARS, CHECK (✓) YES; OTHERWISE, NO.

SELLING

- | | YES | NO | |
|-----|-----|-----|---|
| 1. | ___ | ___ | Meet the customer and determine wants and needs. |
| 2. | ___ | ___ | Package merchandise. |
| 3. | ___ | ___ | Direct customers to other departments and work interdepartmental sales. |
| 4. | ___ | ___ | Help customer handle or try on merchandise. |
| 5. | ___ | ___ | Determine amounts of credit charges or layaway charges. |
| 6. | ___ | ___ | Receive stock from supplies or delivery man. |
| 7. | ___ | ___ | Hear and handle complaints or refer to supervisor. |
| 8. | ___ | ___ | Suggest additional or related items for sale. |
| 9. | ___ | ___ | Fill out mail orders and catalog orders. |
| 10. | ___ | ___ | Use company advertising in selling. |
| 11. | ___ | ___ | Take phone orders and sell by telephone. |
| 12. | ___ | ___ | Make written forms and reports to supervisors. |
| 13. | ___ | ___ | Train new sales people. |
| 14. | ___ | ___ | Prepare daily report forms. |
| 15. | ___ | ___ | Explain care of merchandise and demonstrate its uses. |
| 16. | ___ | ___ | Prepare merchandise for layaway. |
| 17. | ___ | ___ | Translate product knowledge into customer benefits. |
| 18. | ___ | ___ | Write merchandise return tickets. |
| 19. | ___ | ___ | Return merchandise to its proper place in stock. |
| 20. | ___ | ___ | Replenish floor stock from reserve stock. |
| 21. | ___ | ___ | Write up orders for routine reorders of merchandise from basic stock list. |
| 22. | ___ | ___ | Supervise sales personnel. |
| 23. | ___ | ___ | Arrange stock in selling area and keep record of amounts and variety on hand. |

YES NO

24. ___ ___ Study literature relating to a product.
25. ___ ___ Approve and accept checks.
26. ___ ___ Evaluate customers' wants and needs.
27. ___ ___ Serve more than one customer at a time during rush periods.
28. ___ ___ Follow up of sales to insure customer satisfaction and sell additional items.
29. ___ ___ Cover counters and garments at night.
30. ___ ___ Demonstrate merchandise.
31. ___ ___ Point out hidden values of merchandise.
32. ___ ___ Keep customer records in order to build up a clientele or following.
33. ___ ___ Use trade-ups with customers.
34. ___ ___ Gift wrap packages.
35. ___ ___ Use sales register and handle monies.
36. ___ ___ Process merchandise returns and exchanges.
37. ___ ___ Reticket merchandise.
38. ___ ___ Schedule hours and duties of other salespeople.
39. ___ ___ Assist customers in decision making.
40. ___ ___ Write sales tickets.
41. ___ ___ Confer with supervisor on selling problems.
42. ___ ___ Use a variety of techniques to close sales.
43. ___ ___ Count and record till and deposit money with cashier.
44. ___ ___ Maintain stock control records.
45. ___ ___ Make competitive shopping trips to other stores.
46. ___ ___ Check stock for damaged or soiled merchandise.
47. ___ ___ Construct departmental merchandise display.
48. ___ ___ Relate company policies to all decisions.
49. ___ ___ Rotate stock to keep first-in merchandise in prime selling position.
50. ___ ___ Order and replenish departmental supplies.
51. ___ ___ Keep counters and fixtures clean and in order.

Please list any other major types of selling tasks you perform in your occupation.

KEEPING AND COUNTING STOCK

- | | YES | NO | |
|-----|-----|-----|---|
| 52. | ___ | ___ | Keep counters and display fixtures clean and attractive. |
| 53. | ___ | ___ | Arrange stock for counting. |
| 54. | ___ | ___ | Inform responsible person when stocks are low. |
| 55. | ___ | ___ | Arrange understock and reserve stock. |
| 56. | ___ | ___ | Re-mark merchandise for special sales events. |
| 57. | ___ | ___ | Prepare rejected merchandise for return to supplier. |
| 58. | ___ | ___ | Unpack and assemble merchandise. |
| 59. | ___ | ___ | Record price of item on proper type ticket. |
| 60. | ___ | ___ | Record sales on unit control records. |
| 61. | ___ | ___ | Arrange selling stock. |
| 62. | ___ | ___ | Prominently display volume sellers at key traffic points. |
| 63. | ___ | ___ | Multiply and extend figures. |
| 64. | ___ | ___ | Correspond with suppliers about adjustments on merchandise received. |
| 65. | ___ | ___ | Prepare stock reports for management. |
| 66. | ___ | ___ | Prepare merchandise for sales floor. |
| 67. | ___ | ___ | Maintain stock control cards. |
| 68. | ___ | ___ | Keep stock neatly arranged and in order. |
| 69. | ___ | ___ | Keep older merchandise moved to front of selling stock. |
| 70. | ___ | ___ | Add long columns of figures. |
| 71. | ___ | ___ | Handle computer punch tickets. |
| 72. | ___ | ___ | Collect information, obtain facts and ideas and present them in clear, logical order. |
| 73. | ___ | ___ | Schedule stock counts. |
| 74. | ___ | ___ | Count and record stock. |
| 75. | ___ | ___ | Fill salesmen's orders for stock for delivery. |
| 76. | ___ | ___ | Replenish selling stock from reserve stock. |
| 77. | ___ | ___ | Deliver packaged merchandise to store exit for customer pickup. |
| 78. | ___ | ___ | Order special merchandise from catalog. |

Please list any other major types of keeping and counting stock tasks you perform in your occupation:

OPERATING CHECKSTAND AND SALES REGISTER

- | | YES | NO | |
|-----|-----|-----|--|
| 79. | ___ | ___ | Greet customers. |
| 80. | ___ | ___ | Record charge sales. |
| 81. | ___ | ___ | Package merchandise. |
| 82. | ___ | ___ | Figure daily sales register tally. |
| 83. | ___ | ___ | Prepare technical reports. |
| 84. | ___ | ___ | Use communications equipment: telephone, teletype, dictation equipment, loud-speaker, etc. |
| 85. | ___ | ___ | Receive checks from customers. |
| 86. | ___ | ___ | Accept and process merchandise returned by customers. |
| 87. | ___ | ___ | Record stock numbers of items sold on the sales register. |
| 88. | ___ | ___ | Record cash sales. |
| 89. | ___ | ___ | Record C.O.D. sales. |
| 90. | ___ | ___ | Handle received on account and paid out transactions. |
| 91. | ___ | ___ | Handle split tickets, punched tickets, and other unit control inventory devices. |
| 92. | ___ | ___ | Make change. |
| 93. | ___ | ___ | Use charge plates. |
| 94. | ___ | ___ | Gift wrap merchandise. |
| 95. | ___ | ___ | Check out register at end of day. |
| 96. | ___ | ___ | Replace sales register tapes. |
| 97. | ___ | ___ | Get credit department approval on non-routine credit purchases. |

Please list any other major types of checkstand and sales register operation tasks you perform in your occupation.

RECEIVING, CHECKING, AND MARKING MERCHANDISE

YES NO

- | | | | |
|------|-----|-----|--|
| 98. | ___ | ___ | Receive merchandise from delivery men and common carriers. |
| 99. | ___ | ___ | Ticket merchandise. |
| 100. | ___ | ___ | Distribute merchandise to selling floor and to reserve stockroom. |
| 101. | ___ | ___ | Process packing lists. |
| 102. | ___ | ___ | Work with fractions, decimals, and percentages in determining prices to be marked on merchandise. |
| 103. | ___ | ___ | Count merchandise and compare it with invoice and buyer's order to insure agreement as to quality, color, size, and style. |
| 104. | ___ | ___ | Unpack merchandise. |
| 105. | ___ | ___ | Check condition of merchandise received. |
| 106. | ___ | ___ | Prepare merchandise for delivery to selling floor. |
| 107. | ___ | ___ | Correspond with suppliers concerning returns and adjustments. |
| 108. | ___ | ___ | Prepare right type of ticket with necessary information for each item received. |
| 109. | ___ | ___ | Prepare insurance forms on damaged merchandise received. |
| 110. | ___ | ___ | Report incorrect orders and damaged stock to supervisor. |
| 111. | ___ | ___ | Keep receiving room tools and equipment in order. |
| 112. | ___ | ___ | Mark tickets using store's coding systems for prices, stock numbers, and dating. |
| 113. | ___ | ___ | Keep receiving room clean and orderly. |
| 114. | ___ | ___ | Determine price to be marked on merchandise from buyer's or merchandise manager's information sheet. |

Please list any other major types of receiving, checking, and marking tasks you perform in your occupation:

DELIVERY

- | | YES | NO | |
|------|-----|-----|---|
| 115. | ___ | ___ | Prepare delivery sales tickets. |
| 116. | ___ | ___ | Figure delivery dates from schedules. |
| 117. | ___ | ___ | Install delivered goods in home. |
| 118. | ___ | ___ | Suggest additional related purchases when delivering goods. |
| 119. | ___ | ___ | Collect on C.O.D. delivery.. |
| 120. | ___ | ___ | Figure postage rates. |
| 121. | ___ | ___ | Fill in standardized delivery forms. |
| 122. | ___ | ___ | Prepare and record C.O.D. sales. |
| 123. | ___ | ___ | Figure delivery cost from schedules. |
| 124. | ___ | ___ | Figure least expensive routing and carrier on deliveries. |
| 125. | ___ | ___ | Package merchandise and take to delivery department. |

Please list any other major types of delivery tasks you perform in your occupation:

KEEPING ACCOUNTS AND RECORDS

- | | YES | NO | |
|------|-----|-----|--|
| 126. | ___ | ___ | Keep customer credit records of charges and payments. |
| 127. | ___ | ___ | Prepare sales register stock control tapes for transmittal to computer center. |
| 128. | ___ | ___ | Compute payroll. |
| 129. | ___ | ___ | Prepare daily sales sheets by department or employee. |
| 130. | ___ | ___ | Keep records and copies of store advertisements. |
| 131. | ___ | ___ | Read and apply tax charts. |
| 132. | ___ | ___ | Record daily sales in unit control forms. |
| 133. | ___ | ___ | Collect information and prepare reports in clear, logical manner. |
| 134. | ___ | ___ | Record and report federal and state taxes. |

- | | YES | NO | |
|------|-----|-----|--|
| 135. | ___ | ___ | Record stock count information in proper book. |
| 136. | ___ | ___ | Figure withholding tax and other deductions. |
| 137. | ___ | ___ | Record inventory records in proper form. |
| 138. | ___ | ___ | Take and file customer credit applications and references. |
| 139. | ___ | ___ | Prepare key punched stock control tickets for transmittal to supplier. |
| 140. | ___ | ___ | Record receipts and payment in proper amounts. |
| 141. | ___ | ___ | Record invoice information in proper record forms. |
| 142. | ___ | ___ | Record time clock data on payroll forms. |
| 143. | ___ | ___ | Record sales register tapes. |
| 144. | ___ | ___ | Keep current files of invoices and purchase orders. |
| 145. | ___ | ___ | Use communications equipment: telephone, teletype, dictation equipment, etc. |

Please list any other major types of account and record tasks you perform in your occupation:

COMPUTING INFORMATION USING MATHEMATICS SKILLS

- | | YES | NO | |
|------|-----|-----|---|
| 146. | ___ | ___ | Figure fractions and decimals. |
| 147. | ___ | ___ | Use transportation costs and terms of sale in computing costs of merchandise. |
| 148. | ___ | ___ | Work with percentages. |
| 149. | ___ | ___ | Use accounting system based on retail price. |
| 150. | ___ | ___ | Figure gross margin percentages. |
| 151. | ___ | ___ | Use transportation rate schedule. |
| 152. | ___ | ___ | Analyze charts and graphs. |
| 153. | ___ | ___ | Figure discounts and datings. |
| 154. | ___ | ___ | Compute factors which affect gross margin. |

YES NO

155. Calculate turnover rate.
156. Compute stock to sales ratios.
157. Figure cash and trade discounts.
158. Compute open to buy.
159. Use formulas for markup and markdown.

Please list any other major types of computing tasks you perform in your occupation.

PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS

YES NO

160. Clean the store windows.
161. Prepare or assemble items for display.
162. Set up departmental displays of sales items.
163. Select appropriate theme, color scheme, and type of fixture.
164. Train display personnel.
165. Schedule displays for department.
166. Gather merchandise for use in displays, keep records of the items, and return to stock.
167. Make selling displays.
168. Dismantle displays and return merchandise to stock.
169. Coordinate pieces and accessorize merchandise to be displayed.
170. Plan seasonal display themes.
171. Select time and place for each display.
172. Dress mannequins for display.
173. Make departmental signs.
174. Put up interior store decorations.
175. Coordinate displays of advertised and featured merchandise.
176. Purchase supplies for displays.
177. Develop a display budget.
178. Design layout of each display.

YES NO

179. Make background pieces.
180. Trim show windows and set up displays.
181. Dress showcase.
182. Cover displays at night.
183. Use and service display equipment
(mannequins, sign holders, sign printers,
staplers, saws, paint equipment, etc.)

Please list any other major types of display tasks you perform in your occupation:

PLANNING, PREPARING, AND PLACING ADVERTISEMENTS

YES NO

184. Determine customer demand for store's products.
185. Secure or prepare illustrations.
186. Write headlines.
187. Write radio copy.
188. Coordinate displays and advertisements.
189. Evaluate effectiveness of ads in terms of sales.
190. Plan institutional form for ads designed to establish a store image.
191. Write newspaper copy.
192. Use other store display and selling areas in conjunction with advertising.
193. Supervise work of other employees.
194. Prepare advertising budget.
195. Price advertising in various media.
196. Proofread ads.
197. Use telephone to advertise.
198. Train other advertising personnel.
199. Plan advertising program and schedule.
200. Make basic layout plans.
201. Use commercial mat services.

YES NO

202. ___ ___ Use various type styles on copy.
203. ___ ___ Take advertising copy to media for
preparation of proof copies.
204. ___ ___ Keep copies of all ads.

Please list any other major types of advertising tasks
you perform in your occupation:

You may occasionally be called on to perform tasks
normally done by operational management personnel.
Will you indicate below the management tasks you perform
regularly in connection with your job.

BUYING MERCHANDISE FOR RESALE

YES NO

205. ___ ___ Determine customer demand.
206. ___ ___ Analyze selling or operating cost for
department, salesperson, line of
merchandise, etc.
207. ___ ___ Establish price lines for department and
prices for individual items.
208. ___ ___ Make decisions on hiring, promoting,
or firing employees.
209. ___ ___ Negotiate with vendors on terms and
discount procedures.
210. ___ ___ Compute open to buy amount by department
and smaller units.
211. ___ ___ Go to vendors' shows or to market to
make buying decisions.
212. ___ ___ Shop competitive stores.

Please list any other major types of buying tasks you
perform in your occupation:

PRICING MERCHANDISE

- | | YES | NO | |
|------|-----|-----|--|
| 213. | ___ | ___ | Determine what factors affect your gross margin. |
| 214. | ___ | ___ | Determine rate of turnover for item, line, or department and apply results to store situation. |
| 215. | ___ | ___ | Evaluate and determine rate or amount of trade-ins and premiums or various items. |
| 216. | ___ | ___ | Apply factors of how the price affects the consumer to the pricing of items. |
| 217. | ___ | ___ | Use the store's pricing policies in determining price of a product. |
| 218. | ___ | ___ | Determine markup and markdown. |

Please list any other major types of pricing tasks you perform in your occupation:

CONTROLLING MERCHANDISE

- | | YES | NO | |
|------|-----|-----|---|
| 219. | ___ | ___ | Forecast sales for a season/year. |
| 220. | ___ | ___ | Schedule and conduct inventories. |
| 221. | ___ | ___ | Match inventory to customer demand. |
| 222. | ___ | ___ | Determine departmental operating costs or selling costs. |
| 223. | ___ | ___ | Compute and use turnover figures. |
| 224. | ___ | ___ | Estimate expenses and price reductions for a season/year. |
| 225. | ___ | ___ | Use various inventory control systems. |

Please list any other major types of merchandise control tasks you perform in your occupation:

APPENDIX G

SUPERVISORS TASK SURVEY INSTRUMENT

You can help our schools give your sons and daughters the kind of education they need to earn a satisfactory income.

As you know, many changes are taking place in the kinds of work people do. Schools need up-to-date facts about exactly what kinds of work are being done. These facts will help schools provide useful training.

You have been selected to help with a nation-wide study to show what actual kinds of work people in various occupations do.

The information will be strictly confidential.

Your cooperation is appreciated and will help your schools prepare young people for the future.

After you have completed the attached questionnaire, return it promptly in the enclosed self-addressed envelope. No postage is necessary.

THIS PROJECT IS SPONSORED BY:

United States Office of
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Washington State University
University of Idaho
Washington State Board for
Vocational Education
Idaho State Board for
Vocational Education

THE FOLLOWING GENERAL INFORMATION
WOULD BE VERY USEFUL IN THIS STUDY

In questions 1 - 4 please fill in the blank with the necessary information.

1. Name _____
2. Present Job Title _____
3. Name of Employing Firm _____
4. Address of Employing Firm _____

In questions 5 - 6 check (✓) all the answers that apply to you.

5. In which area do you work?

- | | |
|---|--|
| <input type="checkbox"/> 1. Building Trades | <input type="checkbox"/> 5. Retail Sales |
| <input type="checkbox"/> 2. Electronics | <input type="checkbox"/> 6. Office |
| <input type="checkbox"/> 3. Child Care | <input type="checkbox"/> 7. Agriculture |
| <input type="checkbox"/> 4. Food Service | |

6. Where did you receive your specialized occupational training?

- | | |
|---|---|
| <input type="checkbox"/> 1. On the job
(not apprentice) | <input type="checkbox"/> 8. High School |
| <input type="checkbox"/> 2. Apprentice | <input type="checkbox"/> 9. Junior College |
| <input type="checkbox"/> 3. Military | <input type="checkbox"/> 10. Self Taught |
| <input type="checkbox"/> 4. Business College | <input type="checkbox"/> 11. Other
(please list) |
| <input type="checkbox"/> 5. Trade or Technical School | _____ |
| <input type="checkbox"/> 6. Correspondence | _____ |
| <input type="checkbox"/> 7. Specialized School (for
example: IBM Key Punch
School, Heavy Equipment
School) | _____ |
| | _____ |

In questions 7 - 11 please circle the one answer which applies.

7. What was the highest grade of school you completed?

8 or less, 9, 10, 11, 12, 13, 14, 15, 16 or more

8. Sex. Male Female

9. Age. Under 20 20-30 31-50 Over 50
10. For how many years have you been in your present occupation?
 Less than 1 year 1-5 years More than 5 years
11. How many times have you changed occupations in the past 5 years? (For example: plumber to sheet metal worker to retail sales = 2 changes)
 0 times 1 - 2 times 3 or more times

In questions 12 - 17 please check (✓) the one answer which applies.

12. Main emphasis of high school study.
- | | |
|--|--|
| <input type="checkbox"/> 1. College Prep | <input type="checkbox"/> 4. Distributive Education |
| <input type="checkbox"/> 2. Vocational | <input type="checkbox"/> 5. Scientific |
| <input type="checkbox"/> 3. Business Education | <input type="checkbox"/> 6. None |
13. Highest level of on-the-job employment training program completed.
- | | |
|--|---|
| <input type="checkbox"/> 1. Store Procedures | <input type="checkbox"/> 4. Management Training |
| <input type="checkbox"/> 2. Sales Training | <input type="checkbox"/> 5. None |
| <input type="checkbox"/> 3. Supervisory Training | |
14. Number of times you have transferred from one major task to another within this firm, i.e., stockkeeping to selling to buyer, etc.
- | | |
|----------------------------------|--------------------------------------|
| <input type="checkbox"/> 1. None | <input type="checkbox"/> 5. 4 |
| <input type="checkbox"/> 2. 1 | <input type="checkbox"/> 6. 5 to 7 |
| <input type="checkbox"/> 3. 2 | <input type="checkbox"/> 7. 8 to 10 |
| <input type="checkbox"/> 4. 3 | <input type="checkbox"/> 8. 11 to 20 |
15. Number of hours worked per week.
- | |
|--|
| <input type="checkbox"/> 1. Less than 20 |
| <input type="checkbox"/> 2. 20 - 32 |
| <input type="checkbox"/> 3. More than 32 |

16. Now many employees do you supervise?

- 1. None
- 2. 1 - 5
- 3. More than 5

17. What is your direct supervisor's job title? _____

18. Check each of the following statements which apply to your major task in the store.

- | | |
|---|---|
| <input type="checkbox"/> 1. Selling | <input type="checkbox"/> 8. Record keeping |
| <input type="checkbox"/> 2. Stockkeeping | <input type="checkbox"/> 9. Pricing |
| <input type="checkbox"/> 3. Cashiering | <input type="checkbox"/> 10. Buying |
| <input type="checkbox"/> 4. Receiving, marking
merchandise | <input type="checkbox"/> 11. Controlling
merchandise |
| <input type="checkbox"/> 5. Display | <input type="checkbox"/> 12. Credit control |
| <input type="checkbox"/> 6. Advertising | <input type="checkbox"/> 13. Other _____ |
| <input type="checkbox"/> 7. Delivery | <input type="checkbox"/> 14. Other _____ |

INSTRUCTIONS

On the following pages is a list of tasks (activities).

Read each task listed.

If you have actually performed the task during the past two years, check (✓) the blank under "YES" which appears to the left of the item.

If you have not performed the task in the last two years, check (✓) the blank under "NO" to the left of the item.

DO NOT CHECK "YES" UNLESS YOU HAVE ACTUALLY PERFORMED THIS TASK IN THE LAST TWO (2) YEARS.

MAKE CERTAIN THAT YOU CHECK EACH ITEM EITHER "YES" OR "NO".

An example may be helpful to you:

YES NO

✓ — Type letters (A check of "YES" indicates you have typed letters as part of your occupation in the past couple of years.)

— ✓ Drive a truck (A check of "NO" indicates you have not driven a truck as part of your occupation in the past couple of years, even though you may be able to do it)

IF YOU HAVE PERFORMED THESE TASKS
IN YOUR OCCUPATION IN THE PAST COUPLE
OF YEARS, CHECK (✓) YES; OTHERWISE NO.

DELIVERY

- | | YES | NO | |
|------|-----|-----|--|
| 115. | ___ | ___ | Prepare delivery sales tickets. |
| 116. | ___ | ___ | Figure delivery dates from schedules. |
| 117. | ___ | ___ | Install delivered goods in home. |
| 118. | ___ | ___ | Suggest additional related purchases
when delivering goods. |
| 119. | ___ | ___ | Collect on C.O.D. delivery. |
| 120. | ___ | ___ | Figure postal rates. |
| 121. | ___ | ___ | Fill in standardized delivery form. |
| 122. | ___ | ___ | Prepare and record C.O.D. sales. |
| 123. | ___ | ___ | Figure delivery cost from schedules. |
| 124. | ___ | ___ | Figure least expensive routing and
carrier on deliveries. |
| 125. | ___ | ___ | Package merchandise and take to
delivery department. |

Please list any other major types of delivery tasks
you perform in your occupation:

KEEPING ACCOUNTS AND RECORDS

- | | YES | NO | |
|------|-----|-----|---|
| 126. | ___ | ___ | Keep customer credit records of charges
and payments. |
| 127. | ___ | ___ | Prepare sales register stock control
tapes for transmittal to computer center. |
| 128. | ___ | ___ | Compute payroll. |
| 129. | ___ | ___ | Prepare daily sales sheets by department
or employee. |
| 130. | ___ | ___ | Keep records and copies of store
advertisements. |
| 131. | ___ | ___ | Read and apply tax charts. |
| 132. | ___ | ___ | Record daily sales in unit control forms. |

- | | YES | NO | |
|------|-----|-----|--|
| 133. | ___ | ___ | Collect information and prepare reports in clear, logical manner. |
| 134. | ___ | ___ | Record and report federal and state taxes. |
| 135. | ___ | ___ | Record stock count information in proper book. |
| 136. | ___ | ___ | Figure withholding tax and other deductions. |
| 137. | ___ | ___ | Record inventory records in proper form. |
| 138. | ___ | ___ | Take and file customer credit applications and references. |
| 139. | ___ | ___ | Prepare key punched stock control tickets for transmittal to supplier. |
| 140. | ___ | ___ | Record receipts and payment in proper accounts. |
| 141. | ___ | ___ | Record invoice information in proper record forms. |
| 142. | ___ | ___ | Record time clock data on payroll forms. |
| 143. | ___ | ___ | Record sales register tapes. |
| 144. | ___ | ___ | Keep current files of invoices and purchase orders. |
| 145. | ___ | ___ | Use communications equipment: telephone, teletype, dictation equipment, etc. |

Please list any other major types of account and record tasks you perform in your occupation:

COMPUTING INFORMATION USING MATHEMATICS SKILLS

- | | YES | NO | |
|------|-----|-----|---|
| 146. | ___ | ___ | Figure fractions and decimals. |
| 147. | ___ | ___ | Use transportation costs and terms of sale in computing costs of merchandise. |
| 148. | ___ | ___ | Work with percentages. |
| 149. | ___ | ___ | Use accounting system based on retail price. |
| 150. | ___ | ___ | Figure gross margin percentages. |
| 151. | ___ | ___ | Use transportation rate schedules. |

- | | YES | NO | |
|------|-----|-----|--|
| 152. | ___ | ___ | Analyze charts and graphs. |
| 153. | ___ | ___ | Figure discounts and datings. |
| 154. | ___ | ___ | Compute factors which affect gross margin. |
| 155. | ___ | ___ | Calculate turnover rate. |
| 156. | ___ | ___ | Compute stock to sales ratios. |
| 157. | ___ | ___ | Figure cash and trade discounts. |
| 158. | ___ | ___ | Compute open to buy. |
| 159. | ___ | ___ | Use formulas for markup and markdown. |

Please list any other major types of computing tasks you perform in your occupation:

PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS

- | | YES | NO | |
|------|-----|-----|---|
| 160. | ___ | ___ | Clean the store windows. |
| 161. | ___ | ___ | Prepare or assemble items for display. |
| 162. | ___ | ___ | Set up departmental displays of sales items. |
| 163. | ___ | ___ | Select appropriate theme, color scheme, and type of fixture. |
| 164. | ___ | ___ | Train display personnel. |
| 165. | ___ | ___ | Schedule displays for department. |
| 166. | ___ | ___ | Gather merchandise for use in displays, keep records of the items, and return to stock. |
| 167. | ___ | ___ | Make selling displays. |
| 168. | ___ | ___ | Dismantle displays and return merchandise to stock. |
| 169. | ___ | ___ | Coordinate pieces and accessorize merchandise to be displayed. |
| 170. | ___ | ___ | Plan seasonal display themes. |
| 171. | ___ | ___ | Select time and place for each display. |
| 172. | ___ | ___ | Dress mannequins for display. |
| 173. | ___ | ___ | Make departmental signs. |
| 174. | ___ | ___ | Put up interior store decorations. |
| 175. | ___ | ___ | Coordinate displays of advertised and featured merchandise. |
| 176. | ___ | ___ | Purchase supplies for displays. |
| 177. | ___ | ___ | Develop a display budget. |

- | | YES | NO | |
|------|-----|-----|--|
| 178. | ___ | ___ | Design layout of each display. |
| 179. | ___ | ___ | Make background pieces. |
| 180. | ___ | ___ | Trim show windows and set up displays. |
| 181. | ___ | ___ | Dress showcase. |
| 182. | ___ | ___ | Cover displays at night. |
| 183. | ___ | ___ | Use and service display equipment
(mannequins, sign holders, sign painters,
staplers, saws, paint equipment, etc.) |

Please list any other major types of display tasks you perform in your occupation:

PLANNING, PREPARING, AND PLACING ADVERTISEMENTS

- | | YES | NO | |
|------|-----|-----|--|
| 184. | ___ | ___ | Determine consumer demand for store's products. |
| 185. | ___ | ___ | Secure or prepare illustrations. |
| 186. | ___ | ___ | Write headlines. |
| 187. | ___ | ___ | Write radio copy. |
| 188. | ___ | ___ | Coordinate displays and advertisements. |
| 189. | ___ | ___ | Evaluate effectiveness of ads in terms of sales. |
| 190. | ___ | ___ | Plan institutional form for ads designed to establish a store image. |
| 191. | ___ | ___ | Write newspaper copy. |
| 192. | ___ | ___ | Use other store display and selling areas in conjunction with advertising. |
| 193. | ___ | ___ | Supervise work of other employees. |
| 194. | ___ | ___ | Prepare advertising budget. |
| 195. | ___ | ___ | Price advertising in various media. |
| 196. | ___ | ___ | Proofread ads. |
| 197. | ___ | ___ | Use telephone to advertise. |
| 198. | ___ | ___ | Train other advertising personnel. |
| 199. | ___ | ___ | Plan advertising program and schedule. |
| 200. | ___ | ___ | Make basic layout plans. |
| 201. | ___ | ___ | Use commercial mat service. |

- | | YES | NO | |
|------|-----|-----|---|
| 202. | ___ | ___ | Use various type styles in copy. |
| 203. | ___ | ___ | Take advertising copy to media for preparation of proof copies. |
| 204. | ___ | ___ | Keep copies of all ads. |

Please list any other major types of advertising tasks you perform in your occupation:

BUYING MERCHANDISE FOR RESALE

- | | YES | NO | |
|------|-----|-----|---|
| 226. | ___ | ___ | Determine customer demand. |
| 227. | ___ | ___ | Analyze selling or operating cost for department, salesperson, line of merchandise, etc. |
| 228. | ___ | ___ | Communicate with supplier about returns or adjustments on purchases. |
| 229. | ___ | ___ | Select buying sources. |
| 230. | ___ | ___ | Establish price lines for department and prices for individual items. |
| 231. | ___ | ___ | Handle employee complaints. |
| 232. | ___ | ___ | Keep up on current trends in buying and styles. |
| 233. | ___ | ___ | Sell on floor. |
| 234. | ___ | ___ | Instruct salespeople in new merchandise information. |
| 235. | ___ | ___ | Supervise salespeople. |
| 236. | ___ | ___ | Train new salespeople and stock people. |
| 237. | ___ | ___ | Make routine purchase order decisions, i.e., route, type transport, delivery schedule, dating, amounts. |
| 238. | ___ | ___ | Determine markdowns. |
| 239. | ___ | ___ | Make decisions on hiring, promoting, or firing employees. |
| 240. | ___ | ___ | Select and/or buy merchandise for special promotions. |
| 241. | ___ | ___ | Negotiate with vendors on terms and discount procedures. |

	YES	NO	
242.	___	___	Establish merchandise dating procedure.
243.	___	___	Make routine reports on employee effectiveness to personnel manager.
244.	___	___	Use manufacturers' semi-automated price ticket stock count and reorder process on basic stock.
245.	___	___	Use middlemen in some purchases.
246.	___	___	Set advertising schedule and budget.
247.	___	___	Compute open to buy amounts by department and smaller units.
248.	___	___	Keep and invoice inventory control.
249.	___	___	Go to vendors' shows or to market to make buying decisions.
250.	___	___	Schedule special promotions.
251.	___	___	Prepare purchase orders with transportation rates and schedules.
252.	___	___	Plan layout of merchandise.
253.	___	___	Make decisions on customer returns and allowances.
254.	___	___	Set up basic stock schedules for department and set reorder procedure on basic stock.
255.	___	___	Establish code system for marking merchandise.
256.	___	___	Order from catalogs.
257.	___	___	Figure turnover rates by department and by individual items.
258.	___	___	Supervise inventories.
259.	___	___	Schedule buying and delivery dates.
260.	___	___	Shop competitive stores.
261.	___	___	Schedule employees' work week.
262.	___	___	Figure stock to sales ratio.
263.	___	___	Maintain and use a unit control system on special merchandise.
264.	___	___	Communicate with vendors about adjustments or returns on incorrect orders.
265.	___	___	Make decisions on quantities, styles, varieties, etc. to buy.
266.	___	___	Communicate with insurance companies on claims and adjustments.

YES NO

267. Develop advertising plans.
268. Determine department, line, and item markup percentages.

Please list any other major types of buying resale merchandise tasks you perform in your occupation:

PRICING MERCHANDISE

YES NO

269. Use federal and state laws that apply to pricing goods when establishing initial prices.
270. Determine what factors affect your gross margin.
271. Use the law of supply and demand in determining initial markup.
272. Work with decimals, fractions and percentages in establishing prices.
273. Consider the costs involved in determining a price for an item.
274. Employ the use of elastic and inelastic demand in pricing decisions.
275. Determine the cost of merchandise sold.
276. Determine rate of turnover for item, line or department and apply results to store situation.
277. Use coding systems in premarking merchandise.
278. Evaluate and determine rate or amount of trade-ins and premiums on various items.
279. Analyze the use of trading stamps and their effect on the item's price.
280. Use loss leaders in your promotion and sales policies.
281. Apply factors of how the price affects the consumer to the pricing of items.
282. Use the store's pricing policies in determining price of a good.

- | | YES | NO | |
|------|-----|-----|--|
| 283. | ___ | ___ | Determine markup and markdown. |
| 284. | ___ | ___ | Use the principles of monopoly pricing, competitive pricing, judgment pricing, and price lining. |
| 285. | ___ | ___ | Use manufacturers' pre-priced merchandise in determining prices. |
| 286. | ___ | ___ | Use markup and markdown formulas. |
| 287. | ___ | ___ | Figure open to buy. |

Please list any other major types of pricing tasks you perform in your occupation:

CONTROLLING MERCHANDISE

- | | YES | NO | |
|------|-----|-----|---|
| 288. | ___ | ___ | Forecast sales for a season/year. |
| 289. | ___ | ___ | Determine current sales trends. |
| 290. | ___ | ___ | Use computers in figuring and analyzing inventory. |
| 291. | ___ | ___ | Schedule and conduct inventories. |
| 292. | ___ | ___ | Match inventory to customer demand. |
| 293. | ___ | ___ | Use ratios in determining selling cost factors. |
| 294. | ___ | ___ | Employ a pattern for the placement of merchandise on shelves. |
| 295. | ___ | ___ | Determine open to buy. |
| 296. | ___ | ___ | Make sales forecasts (based on multiple control factors). |
| 297. | ___ | ___ | Maintain open to buy records. |
| 298. | ___ | ___ | Use purchase request forms. |
| 299. | ___ | ___ | Maintain adequate inventory of most-wanted stock items. |
| 300. | ___ | ___ | Use split ticket system for reporting sales. |
| 301. | ___ | ___ | Determine departmental operating costs or selling costs. |

- | | YES | NO | |
|------|-----|-----|--|
| 302. | ___ | ___ | Train stock keepers. |
| 303. | ___ | ___ | Make up basic stock and routine reorder schedules. |
| 304. | ___ | ___ | Compute and use turnover figures. |
| 305. | ___ | ___ | Use unit inventory control systems including periodic and perpetual count systems. |
| 306. | ___ | ___ | Estimate expenses and price reductions for a season/year. |
| 307. | ___ | ___ | Use dollar inventory control system. |
| 308. | ___ | ___ | Prepare computer punch tickets for transmittal to supplier or computer center. |
| 309. | ___ | ___ | Control losses through markdowns. |
| 310. | ___ | ___ | Employ a pattern for arranging selling stock, understock, reserve stock. |
| 311. | ___ | ___ | Use invoice inventory control system. |
| 312. | ___ | ___ | Prepare sales register inventory tapes for transmittal to computer center. |

Please list any other major types of merchandise control tasks you perform in your occupation:

In order to reach your current position you had to engage in entry level type tasks. Will you indicate which of these tasks you still perform as a part of your operational management duties.

SELLING

- | | YES | NO | |
|------|-----|-----|--|
| 313. | ___ | ___ | Complete the personal selling process. |
| 314. | ___ | ___ | Interpret store policies to customers and salespeople. |
| 315. | ___ | ___ | Supervise and train sales personnel. |

YES NO

316. ___ ___ Handle routine stockkeeping functions.
317. ___ ___ Operate and service the cash register.

Please list any other major types of selling tasks you perform in your occupation:

KEEPING AND COUNTING STOCK

YES NO

318. ___ ___ Arrange and keep stock.
319. ___ ___ Prepare stock for special sales events.
320. ___ ___ Record sales on unit control records.
321. ___ ___ Prepare merchandise for sales floor.
322. ___ ___ Handle computer punch stock control tickets.
323. ___ ___ Count and record stock.

Please list any other major types of stockkeeping tasks you perform in your occupation:

RECEIVING, CHECKING, AND MARKING MERCHANDISE

YES NO

324. ___ ___ Receive merchandise and prepare for pricing.
325. ___ ___ Check condition of merchandise received and handle required related correspondence.
326. ___ ___ Prepare price tickets with necessary information for each item received.
327. ___ ___ Determine price to be marked on tickets.

Please list any other major types of receiving, checking, and marking tasks you perform in your occupation:

OPERATE CHECKSTAND AND SALES REGISTER

YES NO

- 328. ___ ___ **Figure and record sales.**
- 329. ___ ___ **Receive and approve checks or credit.**
- 330. ___ ___ **Accept and process merchandise returned
by customer.**
- 331. ___ ___ **Keep required inventory records.**
- 332. ___ ___ **Prepare information reports on the
checkstand.**

Please list any other major types of checkstand and sales register tasks you perform in your occupation:

APPENDIX H

TABLE III

RETAILING TASK ANALYSIS

QUESTIONNAIRE RETURNS FROM RANDOM ORDER SELECTION OF STORES BY SIC CODE

	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left		Number Returned	Number Returned
	WSES July 1965	Actual June 1966		Non-Supervisors	Supervisors		
<u>531--Department Stores</u>							
Sears, Roebuck and Co. 1st S. and S. Lanier King County	604	480	192	64	54	30	20
Bon Marche Northgate Mall King County	634	608	405	92	68	25	22
Frederick & Nelson Fifth and Pine King County	2569	2508	880	191	170	60	52
Rhode's Western Lakewood Villa Plaza Pierce County	142	136	75	30	30	5	4

TABLE III (Continued)

Number of Employees All Categories	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left		Number Returned
	WSES July 1965	Actual June 1966		Non-Supervisors	Supervisors	
<u>531--Department Stores</u>						
Rhodes Department Store Second and Union King County	286	253	100	30	25	2
J. C. Penney Co. Second and Pike King County	470	423	200	65	63	10
J. C. Penney Co. 5424 S. Tacoma Way Pierce County	253	250	210	75	15	2
Butler Brothers Department Store 300 Northgate Plaza King County	82	75	45	15	15	2
SUB TOTAL (SIC 531)	5040	4733	2107	562	440	114
Per Cent Returned					78%	78%

TABLE III (Continued)

	Number of Employees All Categories		Number of Merchandising Employees June 1966	Number of Forms Left		Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966		Non-Supervisors	Returned		
<u>233--Limited Price Variety Stores</u>							
F. W. Woolworth Co. Third and Pike King County	210	147	60	25	5	23	5
Sprouse Reitz Co. 1201 South K Pierce County	7	7	7	3	1	3	1
Meredith's 10¢ Store 3222 West McGraw King County	6	5	5	2	0	2	0
Spanaway Five and Ten 165th and Pacific Ave. Spanaway Pierce County	3	4	4	2	1	2	1
Wellworth 10¢ Store Box 323 North Bend King County	2	2	2	1	0	1	0

TABLE III (Continued)

	Number of Employees All Categories		Number of Merchandising Employees June 1966		Number of Forms Left Non-Supervisors		Number of Forms Left Supervisors		Number Returned	Number Returned
	WSES July 1965	Actual June 1966	2	1	1	0	1	0		
<u>533--Limited Price Variety Stores</u>										
Capitol Hill 104 Store 422 15th Ave., East King County	2	2	2	1	1	0	0	0	1	0
Rasco 5-10-25 Cent Stores 8536 Greenwood North King County	4	4	4	1	1	1	1	1	1	1
J. H. Fohlman Co. 101 Meridian Street Puyallup Pierce County	4	5	5	2	2	1	1	1	2	1
W. T. Grants Renton King County	42	25	25	11	11	2	2	2	11	2
SUB TOTAL (SIC 533)	280	201	114	48	46	11	11	11	46	11
Per Cent Returned					95%				95%	100%

TABLE III (Continued)

Number of Employees All Categories	Number of Employees June 1966		Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966				
<u>539--General Merchandise Stores</u>						
The Grange Store Carnation, Washington King County	6	4	2	2	0	0
Glazier Dry Goods North Bend, Washington King County	4	3	2	2	0	0
Jensen and Company 1533 Cole Street Enumclaw King County	3	1	0	0	1	1
Grange Supply Co. Issaquah, Washington King County	9	7	4	4	2	0
Murray's Fine Fabrics 214 West Meeker Street Kent King County	4	3	1	1	1	1

TABLE III (Continued)

Number of Employees All Categories	Number of Employees		Number of Merchandising Employees June 1966	Number of Forms Left Non-Supervisors	Number Returned	Number of Forms Left Supervisors	Number Returned
	WSES July 1965	Actual June 1966					
<u>539--General Merchandise Stores</u>							
Discount Mart 115 Broadway Pierce County	5	4	4	3	3	1	1
House of Values 9000 Rainier South King County	70	72	64	27	25	5	5
Seattle Surplus Sales 2400 First Ave. King County	2	2	2	1	1	0	0
Jean's Fabrics 125 Commercial Ave. Kirkland King County	2	3	3	1	1	1	1
Tacoma Fashion Fabrics 916 Broad Pierce Co.	5	4	4	3	3	1	1

TABLE III (Continued)

	Number of Employees All Categories		Number of Merchandising Employees June 1966		Number of Forms Left Non-Supervisors Returned		Number of Forms Left Supervisors Returned	
	WSES July 1965	Actual June 1966	Non-Supervisors	Supervisors	Non-Supervisors	Supervisors	Non-Supervisors	Supervisors
<u>539--General Merchandise Stores</u>								
The Towne Shop North Bend King County	2	3	3	1	1	1	1	1
Mayo Sleep Products 9827 16th Ave. S.W. King County	1	2	2	1	1	0	0	0
Winter's Inc. 6169 4th Ave. South King County	11	15	15	6	6	2	2	2
Value Mart North Aurora King County	42	40	31	10	9	5	5	5
SUB TOTAL (SIC 539)	166	163	146	62	59	18	18	18
Per Cent Returned					95%			100%
TOTAL	5486	5097	2367	672	545	175	143	143
Per Cent Returned					81%			81%

APPENDIX I

RETAILING TASK ANALYSIS

GENERAL MERCHANDISE RETAIL WORKER PROFILE

Per Cents of
Non-Supervisors
Responding

N = 484

Per Cents of
Supervisors
Responding

N = 125

6. Where did you receive your specialized occupational training?

85.3	82.4	On the job (not apprentice)
3.9	4.0	Apprentice
2.1	2.4	Military
5.4	10.4	Business College
4.3	0.8	Trade School
2.3	0.0	Correspondence
1.7	1.7	Specialized school
18.4	18.4	High School
1.9	2.4	Junior College
15.5	16.0	Self taught
9.9	21.6	Other

7. What was the highest grade of school you completed?

2.5	0.8	8 or less
3.1	1.6	9
5.2	0.0	10
7.0	3.2	11
50.6	35.2	12
11.4	6.4	13
11.4	10.4	14
2.3	4.0	15
5.0	38.4	16 or more

8. Sex

M	M
18.4	57.6

9. Age

5.2	0.8	Under 20
15.1	29.6	20 to 30
40.1	42.4	31 to 50
38.0	26.4	Over 50

General Merchandise Retail Worker Profile

Non-Supervisors Supervisor

		10. For how many years have you been in your present occupation?
12.4	8.0	Less than 1 year
27.5	24.0	1 to 5 years
58.3	67.2	More than 5
		11. How many times have you changed occupations in the past 5 years?
76.9	81.6	0 times
19.0	16.0	1 to 2 times
2.7	2.4	3 or more times
		12. Main emphasis of high school study:
32.2	52.8	College prep
6.2	1.6	Vocational
28.5	32.0	Business Education
8.9	4.0	Distributive Education
1.2	8.0	Scientific
16.7	0.8	None
		13. Highest level of on-the-job employment training program completed:
40.7	10.4	Store procedures
24.0	6.4	Sales training
6.0	6.4	Supervisory training
8.7	68.8	Management training
15.7	6.4	None
		14. Number of times you have transferred from one major task to another within this firm:
74.4	11.2	None
10.3	30.4	1
4.3	19.2	2
4.8	19.2	3
1.0	8.8	4
0.4	5.6	5 to 7
0.0	0.8	8 to 10
0.6	4.0	11 to 20

General Merchandise Retail Worker Profile

Non-Supervisors Supervisor

15. Number of hours worked per week:

4.1	0.0	Less than 20
18.0	0.8	20 to 32
77.1	99.2	More than 32

16. How many employees do you supervise?

83.5	0.8	None
9.5	35.2	1 to 5
3.1	64.0	More than 5

18. Check each of the following statements which apply to your major task in the store:

85.3	80.8	Selling
56.8	66.4	Stockkeeping
61.0	32.0	Cashiering
26.2	32.0	Receiving
28.9	55.2	Display
5.0	52.8	Advertising
6.2	15.2	Delivery
26.7	68.0	Record keeping
14.7	56.0	Pricing
11.8	72.8	Buying
11.2	74.4	Controlling
2.5	7.2	Credit control

APPENDIX J

TABLE V

PER CENT OF RESPONDENTS PERFORMING EACH SPECIFIC TASK

SELLING

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
1		2		5		12		29	
3		6		9		14		38	
4		10		13		22			
7		15		21		34			
8		16		25		44			
11		18		32		45			
17		23		33					
19		28		47					
20		30		50					
24		36							
26		37							
27		43							
31		46							
35		49							
39									
40									
41									
42									
48									
51									

Note: Numbers designating each activity are taken from Table IV, page 22-42.

TABLE V (Continued)

KEEPING AND COUNTING STOCK

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
52		53		56		60		64	
54		55		57		65		71	
61		58		59		67		75	
68		62		63		72			
		66		77		73			
		69				78			
		70							
		74							
		76							

OPERATING CHECKSTAND AND SALES REGISTER

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
79		80		89		87		83	
81		82				90			
85		84				91			
92		86				94			
93		88							
		95							
		96							
		97							

TABLE V (Continued)

RECEIVING, CHECKING AND MARKING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
				99		98		101	
				100		102		107	
				104		103		109	
				105		106		111	
				110		108		113	
						112			
						114			

DELIVERY

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
				115	115	116	122	117	117
				122	116	119	124	118	118
				125	120	120		124	119
					121	121			
					123	123			
					125				

TABLE V (Continued)

KEEPING ACCOUNTS AND RECORDS

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	145		129 133 135 137 144	131 145	130 131 132	135 137	128 141 142 143	126 127 128 129 130 132 133 134 136 138 139 140 141 142 143 144	126 127 134 136 138 139 140

COMPUTING INFORMATION USING MATHEMATICS SKILLS

100-90%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	148		146 147 150 155 159		149 152 153 154 156 157 158	146 148 153	151	147 149 150 151 152 154 155 156 157 158 159	

TABLE V (Continued)

PLANNING AND ARRANGING INTERIOR AND WINDOW DISPLAYS

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	162		161	161	163	163	172	160	160
			165	162	168	166	181	164	164
			166		170	167		165	174
			167		171	168		170	176
			169		173	169		171	177
			175		183	175		172	178
								173	179
								174	180
								176	182
								177	
								178	
								179	
								180	
								181	
								182	
								183	

TABLE V (Continued)

PLANNING, PREPARING AND PLACING ADVERTISEMENTS

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
			188		184		185	184	186
			189		193		191	185	187
			196		204		192	186	190
							195	187	194
							199	188	197
							200	189	198
								190	201
								191	202
								192	203
								193	
								194	
								195	
								196	
								197	
								198	
								199	
								200	
								201	
								202	
								203	
								204	

BUYING MERCHANDISE FOR RESALE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
						205			206
						212			207
									208
									209
									210
									211

TABLE V (Continued)

PRICING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
								213	
								214	
								215	
								216	
								217	
								218	

CONTROLLING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
								219	
								220	
								221	
								222	
								223	
								224	
								225	

TABLE V (Continued)

BUYING MERCHANDISE FOR RESALE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	226		230		227		242		266
	228		237		229		246		
	231		239		241		255		
	232		240		244				
	233		243		245				
	234		252		247				
	235		254		248				
	236		259		249				
	238		261		250				
	253		263		251				
	258				256				
	260				257				
	264				262				
	265				267				
					268				

PRICING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	282		270		269		277		278
			272		271		280		279
			273		274				
			275		276				
			283		281				
			285		284				
			286		287				

TABLE V (Continued)

CONTROLLING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	294 299 310		288 289 291 292 298 303 305 309		293 295 296 297 301 302 304 307 311		300 306		290 308 312

SELLING

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	313 314 315 316		317						

TABLE V (Continued)

KEEPING AND COUNTING STOCK

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	318 319 323		320 321						322

RECEIVING, CHECKING AND MARKING MERCHANDISE

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
			325 327				324 326		

OPERATE CHECKSTAND AND SALES REGISTER

100-80%		79-60%		59-40%		39-20%		19-0%	
Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup	Non-Sup	Sup
	329 330		328 331		332				

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE
OFFICE OF EDUCATION
WASHINGTON 25, D.C.
ERIC DOCUMENT RESUME

DATE OF RESUME

December 1966

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14. PUBLISHER Dept of Education, U. of Idaho, Moscow, Idaho					
15. ABSTRACT (250 words max.)					

The purpose of this study was to identify major tasks performed by merchandising employees working in three Standard Industrial Classifications of retail establishments. Those classifications are department stores, variety stores, and general merchandise stores. By questionnaire facts were obtained regarding 12 categories of work performed by supervisory and non-supervisory personnel. Those categories are selling, stockkeeping, checkstand operation, receiving and marking merchandise, delivery, keeping records, computing, display, advertising, buying, pricing, and merchandise control. From collections of that data percentages of employees performing each category of work were determined. This information will be utilized as bases for identification of clusters of knowledges associated with performance of work done by substantial percentages of employees. We assume that, along with requisite skills, acquisition of such knowledges will help pupils succeed in entry jobs and serve as bases for retraining, occupational mobility, and career-long advancement.

16. RETRIEVAL TERMS (Continue on reverse)			
	Distributive Education Retailing Education Clusters Job Analysis		
17. IDENTIFIERS			
Vo-Tech Ed. R. and D. Project ERD-257-65			

Figure 3. ERIC Document Resume

INSTRUCTIONS FOR COMPLETING ERIC DOCUMENT RESUME

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- Field 5. **Title:** Enter full document title. If document comprises only a portion of the total publication or release, refer to field #12. Include subtitles if they add significantly to information in the title proper.
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- Field 6. **Author(s):** Enter personal author(s) (corporate author is entered in field #1), last name first. (Example: Doe, John.)

If two authors are given, enter both. In the case of three or more authors, list only the principal author followed by "and others," or, if no principal author has been designated, the first author given followed by "and others." (Example: Doe, John and others.)

- Field 7. **Date:** Enter date of release of document by month and year. (Example: 12/65.)
- Field 8. **Pagination:** Enter total number of pages of document, including illustrations, appendices, etc. (Example: 115 p.)
- Field 9. **References:** Enter number of references cited in the bibliography of the document. (Example: 106 ref.)
- Field 10. **Report/Series No.:** Enter any unique number assigned to the document by the publisher or corporate source. (Example: OE-53015; LX-135.) Do not enter project numbers; these are added entries field #5.

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16. RETRIEVAL TERMS (Continued)

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