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ABSTRACT

To improve vocational educational programs in agriculture, occupational information on a common core of basic skills within the occupational area of the agricultural-industrial equipment dealership partsman is presented in the revised task inventory survey. The purpose of the occupational survey was to identify a common core of basic skills which are performed and are essential for success in the occupation. Objectives were accomplished by constructing an initial task inventory to identify duty areas and task statements for the occupation. The initial task inventory was reviewed by consultants in the field, and 123 tasks were identified. A random sample of 70 agricultural-industrial equipment dealerships based on the 1975 directory of the Farm and Power Equipment Retailers in Ohio was obtained. Data were collected utilizing employer and employee questionnaires. Thirty-six completed questionnaires were returned. A compilation of basic sample background information is presented on size of dealership, total work experience, employment at current job, and preparation as a partsman. A compilation of duty areas of work performed and work essential for the occupation is given. Percentage performance by incumbent workers and the average level of importance of specific task statements are presented in tabular form. (Author/EC)

AN EMPERICAL DETERMINATION OF TASKS ESSENTIAL TO SUCCESSFUL PERFORMANCE AS AN AGRICULTURAL-INDUSTRIAL EQUIPMENT DEALERSHIP PARTSMAN

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FOREWORD

The Department of Agricultural Education at The Ohio State University is involved in a major programmatic effort to improve the curricula in education programs in agriculture. One product in this effort is this report of the agricultural-industrial equipment dealership partsman task inventory survey. The data reported were collected as part of a more comprehensive thrust designed to develop a common core of basic skills in agribusiness and natural resources.

It is hoped that the revised task inventory contained in this report will be useful to curriculum developers working for improved occupational relevance in schools. Twenty-seven additional inventories in other occupational areas are also reported from this project.

The profession owes its thanks to Edgar Yoder, graduate research associate, for his work in preparing this report. Special appreciation is also expressed to William Davidson, Executive Director, Association of Farm and Power Equipment Retailers in Ohio, for his input and help in securing the cooperation of those employed in this occupational area.

J. David McCracken
Project Director

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INTRODUCTION

Occupational information is needed to develop and revise vocational and technical education curricula. Teachers and curriculum developers generally determine which skills might be taught in a program based upon teacher expertise, advisory committee input, informal and formal community surveys, and/or task inventories.

The Agricultural Education Department at The Ohio State University has utilized and revised a system for obtaining and using occupational information as an effective aid in planning, improving, and updating occupational education curricula. This report presents the results of a survey of the occupation, agricultural-industrial equipment dealership partsman. The information contained herein may be used by curriculum development specialists, teachers, local and state administrators, and others involved in planning and conducting vocational and technical programs in agriculture.

Purpose and Objectives

The major purpose of the occupational survey was to identify the skills which are performed and essential for success as an agricultural-industrial equipment dealership partsman. The specific objectives of this survey were as follows:

1. Develop and validate an initial task inventory for the agricultural-industrial equipment dealership partsman.
2. Identify the specific tasks performed by the agricultural-industrial equipment dealership partsman.
3. Determine the relative importance of the specific tasks to successful employment as an agricultural-industrial equipment dealership partsman.

Definition of the Occupational Area

The agricultural-industrial equipment dealership partsman works in the parts department of agricultural-industrial equipment repair and service centers. The partsman works with both the parts and supplies offered for sale and used in the repair and service center. The specific duties performed by the partsman will vary with the size and type of business. In general, the partsman sells supplies and parts over the counter and phone; orders parts and returns parts to the depot; receives parts, stocks shelves and bins parts; assists in controlling the inventory; writes up statements for customers; handles over-the-counter payments for parts and supplies; and assists in parts department record keeping. In some firms, the partsman may also be called a parts clerk or parts manager.

METHODOLOGY

Objectives were accomplished by constructing an initial task inventory, validating the initial inventory, selecting a sample of workers, collecting data, and analyzing data.

Initial Task Inventory

Duty areas and task statements for the agricultural-industrial equipment dealership partsman were identified by searching existing task lists, job descriptions, curriculum guides, reference publications, and service manuals. Additionally, contacts with several industry personnel aided in clarifying the specific responsibilities of the agriculture-industrial equipment dealership partsman.

All the tasks that the project staff thought to be performed were assembled into one composite list.

The initial tasks were grouped into functional areas called "Duties".

After the task statements were grouped under the proper duty areas, each task statement was reviewed for brevity, clarity, and consistency. In all, 293 task statements were included in the initial task inventory.

Initial Inventory Validation

After the initial task inventory was constructed, it was reviewed by eight consultants employed in agricultural-industrial equipment dealerships. These consultants were either parts department managers, partsmen, or dealership owners.

The consultants were asked to respond to the initial task list inventory by performing the following activities:

1. Indicate whether any of the tasks listed were not appropriate.
2. Add any additional tasks they believed were performed by the agricultural-industrial equipment dealership partsman.
3. Make changes in the wording of tasks to help add clarity to the statements.

The comments from the eight consultants were pooled and needed revisions were made. Eight duty areas were eliminated and two duty areas were combined. One new duty area was added.

As a result of the initial task inventory review process, 123 tasks were identified.

Worker Sample Selection

Since the specific duties and tasks performed by the individual agricultural-industrial equipment dealership partsman are related to the size and type of business where employed, an attempt was made to survey partsmen employed in various sizes and types of equipment dealerships. It was not possible to secure a list of the specific names and addresses of all incumbent workers in the state. Therefore, a sample of 70 agricultural-industrial equipment dealerships was obtained from the 1975 directory of the Farm and Power Equipment Retailers in Ohio using a stratified random sampling

approach. The strata used were type of business and geographical location.

Data Collection

A packet of materials was sent to the owner or manager of the randomly-selected agricultural-industrial equipment dealerships. The packet of materials included:

1. A cover letter from the Association of Farm and Power Equipment Retailers in Ohio.
2. An employer questionnaire printed on blue.
3. An employee questionnaire printed on yellow.
4. A stamped and self-addressed return envelope.

The manager or owner was instructed to complete the employer questionnaire and to have a responsible agricultural-industrial equipment dealership partsman complete the employee questionnaire. The manager or owner was instructed to collect the employee questionnaire and return both the employer and employee questionnaire in the stamped and self-addressed return envelope by the date specified in the cover letter.

A follow-up of non-respondents consisted of mailing a packet of materials two weeks after the initial mailing. The first follow-up consisted of a packet of materials identical to the initial packet except that a cover letter on Ohio State University stationery replaced the cover letter on Association of Farm and Power Equipment Retailers in Ohio stationery.

A final follow-up of non-respondents was initiated four weeks after the initial mailing. A telephone contact by a project staff member was made with 50% of the non-respondents. The non-respondents were asked to complete the questionnaire and emphasis was placed on the importance of their response to the success of the project during the telephone conversation.

Data Analysis

The 36 questionnaires which were returned were checked for completeness and accuracy by the project staff. Information from the 36 usable responses was coded on Fortran coding sheets for key punching. In addition to coding appropriate respondent background information, each specific task statement was coded as to whether it was performed (1 = Task performed by respondent; blank = Task

not performed by respondent) and the level of importance of the task (3 = Essential; 2 = Useful; 1 = Not Important). The information was keypunched on IBM cards and verified by personnel at the Instruction and Research Computer Center at The Ohio State University.

The data was analyzed using the SOUPAC computer program and the facilities of the Instruction and Research Computer Center. Consultant assistance for analyzing the data was provided by personnel at The Center for Vocational Education. The SOUPAC computer analysis resulted in the computation of relative frequencies, means, and rankings for each task statement. The results of the computer analyses were printed in tabular form for ease of interpretation.

FINDINGS

Objectives of the study resulted in the compilation of basic sample background information, the determination of tasks performed by the partsman, and the identification of tasks essential to successful performance as a partsman.

Description of the Sample

Information regarding the performance of tasks and the importance of the tasks to successful employment as an agricultural-industrial equipment dealership partsman was obtained from partsmen in various dealerships across Ohio.

Response to the Survey

A total of 70 questionnaires were mailed and 36 replies were received. This represented a 51.4% rate of return. The response to the questionnaire is summarized in TABLE I.

TABLE I

EMPLOYEE RESPONSE TO THE QUESTIONNAIRE

	N	Percent of All Employees In the Survey
Employees in Survey	70	100.0
Total Returns	36	51.4
Usable Returns	36	51.4
Unusable Returns	0	0
Nonrespondents	34	48.6

Size of Dealership

Partsmen from various size agricultural-industrial equipment firms were included in the study. The number of full-time equivalent (two one-half time partsmen equal one full-time equivalent) partsmen employed in the firm was used as an index to assess the size of the parts department in the dealership where the partsman was employed. Of the 36 questionnaires received, 33 included information regarding the size of the parts department in the dealership. TABLE II summarizes the responses to the question, "How many full-time equivalent partsmen are employed in your dealership?" Eighteen partsmen or 54.5% were employed in firms employing one full-time equivalent partsman. Fourteen partsmen or 42.4% were employed in firms employing two full-time equivalent partsmen. Thus, 100% of the partsmen were working in firms employing one to three full-time equivalent partsmen. The average number of full-time equivalent partsmen employed in the firms was 1.5.

TABLE II

SIZE OF THE PARTS DEPARTMENT IN THE AGRICULTURAL-INDUSTRIAL EQUIPMENT DEALERSHIP WHERE CURRENTLY EMPLOYED

Number of Partsmen Employed in Firm	N	Percent of Respondents
1	18	54.5
2	14	42.4
3	1	3.1
Total	33	100.0

$\bar{X}$ number of partsmen in the firm = 1.5

Total Work Experience

Agricultural-industrial equipment dealership partsmen with varying amounts of work experience in the agricultural-industrial equipment industry were included in the study. TABLE III summarizes the responses to the question, "How many total years have you worked in an agricultural-industrial equipment dealership?" Ten partsmen or 27.8% had from one to three total years of work experience in the agricultural-industrial equipment industry. Nine partsmen or 25.0% had from four to six total years of work experience in the agricultural-industrial equipment industry. Seven

partsmen or 19.4% had 23 or more years of work experience in the agricultural-industrial equipment industry. The total years of work experience in the agricultural-industrial equipment industry ranged from 1-48 years. Partsmen had an average of 12.6 years of total work experience in the agricultural-industrial equipment industry.

TABLE III

TOTAL AMOUNT OF WORK EXPERIENCE IN THE AGRICULTURAL-INDUSTRIAL EQUIPMENT INDUSTRY

Years	N	Percent of Respondents
1-3	10	27.8
4-6	9	25.0
7-10	3	8.4
11-14	2	5.5
15-18	3	8.4
19-22	2	5.5
23 or more	7	19.4
Total	36	100.0

$\bar{X}$ years in the industry = 12.6

Employment at Current Job

Partsmen in the survey had spent varying amounts of time in their present job. TABLE IV summarizes the responses to the question, "How many years have you worked at your present job?" Thirteen partsmen or 36.1% had worked at their present job from one to three years. Seven partsmen or 19.4% had worked at their present job from four to six years. Five partsmen or 13.9% had worked at their present job 23 or more years. The years of work at their present job ranged from 1-46 years. Partsmen had been employed at their present job an average of 10.1 years.

Preparation as a Partsman

Partsmen obtained training for their job from various sources. TABLE V summarizes their responses to the question, "Where did you receive your training as a partsman?" Thirty-six partsmen or 100%

TABLE IV

LENGTH OF TIME AT PRESENT JOB

Years	N	Percent of Respondents
1-3	13	36.1
4-6	7	19.4
7-10	3	8.3
11-14	4	11.1
15-18	2	5.6
19-22	2	5.6
23 or more	5	13.9
Total	36	100.0

$\bar{X}$ years at present job = 10.1

indicated they received training on-the-job. Six partsmen or 16.7% indicated they attended a technical school program to receive training as a partsman. Five partsmen or 13.9% indicated they had received training as a partsman by attending a company school course in parts department operations. Four partsmen or 11.1% indicated they had received training as a partsman through a high school vocational program.

TABLE V

SOURCE OF TRAINING RECEIVED AS A PARTSMAN

	N	Percent of All Employees In The Survey
On-The-Job	36	100.0
High School Program	4	11.1
Technical School Program	6	16.7
Company School/Course	5	13.9

Duty Areas of Work Performed by the Partsman

The 123 tasks were grouped under 14 duty areas. Each respondent indicated whether he performed the specific task in his current position as a partsman. The percentages of respondents performing each task were averaged for all tasks under each duty area. The mean percentage of incumbents who performed specific tasks in specified duty areas is presented in TABLE VI.

Duty areas of work in which 50% or more of the incumbent workers performed the tasks were:

1. Receiving Parts and Other Consumable Merchandise
2. Recording Information
3. Using and Maintaining Catalogs, Price Lists, and Operator's Manuals
4. Maintaining the Parts and Merchandise Sales Area Facility
5. Returning Parts
6. Warehousing and Binning Parts and Other Merchandise
7. Selling Parts and Other Merchandise
8. Planning and Organizing the Parts Department
9. Picking Up and Delivering Parts and Equipment
10. Ordering and Purchasing Parts and Other Merchandise
11. Inspecting and Diagnosing Parts and Equipment Malfunctions
12. Inventorying and Controlling Parts and Other Merchandise
13. Performing General Office Work

Duty Areas of Work Essential for Successful Performance as a Partsman

A level of importance rating was obtained for each task. The respondent could rate the task as essential, useful or not important for successful performance as a partsman. A ranking of essential was assigned a numerical rating of "3", useful a numerical rating of "2", and not important a numerical rating of "1". The level of importance ratings for each task were averaged for all tasks under each duty area. The average level of importance ratings for the specific tasks in the specified duty areas are presented in TABLE VI.

Duty areas of work which received a 2.0 or higher level of importance rating by incumbent workers were:

1. Receiving Parts and Other Consumable Merchandise
2. Recording Information
3. Using and Maintaining Catalogs, Price Lists, and Operator's Manuals

4. Maintaining the Parts and Merchandise Sales Area Facility
5. Returning Parts
6. Warehousing and Binning Parts and Other Merchandise
7. Selling Parts and Other Merchandise
8. Picking Up and Delivering Parts and Equipment
9. Ordering and Purchasing Parts and Other Merchandise
10. Planning and Organizing the Parts Department
11. Inspecting and Diagnosing Parts and Equipment Malfunctions
12. Inventorying and Controlling Parts and Other Merchandise
13. Performing General Office Work
14. Summarizing and Analyzing the Parts Operation

Percentage Performance and Level of Importance Ratings of Specific Tasks

The percentage performance by incumbent workers and the level of importance for each specific task is also presented in TABLE VI.

It is recommended that the results for each specific task be examined by educators and others who are developing educational programs to determine curriculum content for preparing agricultural-industrial equipment dealership partsmen. Specific tasks with a high level of performance and a high level of importance rating should be given more emphasis in the educational program than specific tasks with a low level of performance and a low level of importance rating.

TABLE VI

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE* OF SPECIFIC TASKS

TASK STATEMENTS	Percent Performing	Average Level of Importance
Performing General Office Procedures		
File business forms and records	55	2.4
Use telephone	91	2.9
Write office memos and notes	72	2.5
Use telephone to transmit daily parts sales transactions to manufacturer's computer for analysis purposes	38	2.0
Mean Rating	64.0	2.5
Recording Information		
Record inventory information	88	2.9
Mean Rating	88.0	2.9
Maintaining the Parts and Merchandise Sales Area Facility		
Replace light bulbs	72	2.2
Sweep parts and merchandise sales area floors	86	2.5
Replace or adjust shelves in merchandise display counters	83	2.8
Mean Rating	80.3	2.5
Selling Parts and Other Merchandise		
Complete sales slip	88	2.8
Demonstrate items for sale	72	2.5
Describe items to customers	80	2.7
Prepare sales displays	83	2.4
Greet customers	88	2.9
Interpret customer's parts description into manufacturer's terminology	83	2.6
Make change	77	2.6
Price parts for customers	88	2.8
Take parts orders over phone	86	2.8
Stock shelves in sales area	86	2.7
Use a customer credit plan	47	1.9
Operate billing machine	30	1.8

*Average rating of importance may range from 1-3 with 3 being the highest

TABLE VI (Cont.)

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE OF SPECIFIC TASKS.

TASK STATEMENTS	Percent Performing	Average Level of Importance
Operate cash register	77	2.6
Determine whether part or merchandise requested is on hand	88	2.9
Handle customer complaints	86	2.6
Sell substitute items	80	2.2
Sell related items	91	2.5
Calculate quantity discounts on merchandise	63	2.3
Identify seasonal items	86	2.7
Make in-store sales contact	72	2.4
Participate in parts selling training sessions	72	2.4
Follow up a sale	55	2.1
Close a sale	61	2.3
Conduct sales presentation	44	1.9
Wrap or package merchandise and parts sold	72	2.3
Explain parts warranty and guarantee provisions to customers	83	2.4
Prepare parts sales analysis report	22	1.8
Supply parts to service department as requested	83	3.0
Differentiate between list price and net price	72	2.6
Estimate total cost of parts needed by customer	80	2.4
Determine whether parts needed by customers are covered by warranty	86	2.6
Mean Rating	73.6	2.5
Inventorying and Controlling Parts and Other Merchandise		
Determine when to order	86	2.7
Identify obsolete parts to be removed from inventory	86	2.5
Take physical inventory count	[illegible]	2.6
Identify high activity inventory items	[illegible]	2.5
Use card inventory system	72	2.5
Establish re-order points (ROP) for parts and other merchandise	69	2.5
Determine inventory on hand from inventory cards	50	2.1
Determine amount to carry on inventory	77	2.6
Determine what to carry on inventory	80	2.6
Determine quantity of parts received from inventory card	80	2.6
Flag inventory cards when balance on hand reaches re-order point (ROP)	58	2.1
Identify slow moving inventory items	66	2.3

TABLE VI (Cont.)

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE OF SPECIFIC TASKS

TASK STATEMENTS	Percent Performing	Average Level of Importance
Classify high activity items on high tab or color coded inventory cards.	44	1.9
Classify low activity items on non-tab or color coded inventory cards.	41	1.8
Determine the rate of inventory turnover.	52	2.1
Evaluate how the rate of inventory turnover influences the success of the business.	30	1.9
Insert re-order cards in the inventory file	55	2.3
Assess the influence inadequate or over supplied inventories have on success of business.	36	2.1
Mean Rating	63.3	2.3
Receiving Parts and Other Consumable Merchandise		
Unpack shipments.	91	2.7
Check items received against packing slip.	91	2.9
Inspect merchandise for damage during transport	88	2.9
Note discrepancies, shortages, and damages on packing slip.	88	2.9
Sign shipping receipt	91	2.9
Handle stock to avoid damage.	86	2.8
Locate packing slips.	91	2.9
Tag merchandise as it is unpacked	80	2.7
Identify bin locations of parts	91	2.9
Process shortages, loss, or damages claim	86	2.8
Mean Rating	88.3	2.8
Warehousing and Binning Parts and Other Merchandise		
Determine where materials should be stored.	88	2.6
Store merchandise on first-in first-out order	55	2.1
Place parts in bins	88	2.8
Mean Rating	77.0	2.5
Using and Maintaining Catalogs, Price Lists, and Operator's Manuals		
Locate the specifications of equipment.	77	2.4

TABLE VI (Cont.)

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE OF SPECIFIC TASKS

TASK STATEMENTS	Percent Performing	Average Level of Importance
Locate proper manuals	83	2.6
Interpret sketches and figures in manuals	83	2.7
Match figure numbers with parts descriptions and parts numbers.	86	2.8
Locate part description and number from customer's information.	86	2.8
Determine if a part has been superceded by a new or modified part	88	2.9
Determine if a part is still available if ordered from depot.	86	2.7
Determine the amount of a specific part packed in a standard package.	72	2.4
Identify and interpret prefix, body, and suffix of parts numbers.	83	2.7
Insert supplements and revisions in price lists, parts catalogs, and service manuals.	91	2.9
File manuals, price lists, parts lists, and catalogs.	88	2.9
Identify current and deleted sections of returnable parts list	75	2.6
Mean Rating	83.2	2.7
Picking Up and Delivering Equipment and Parts		
Determine location for pick-up and delivery	69	2.5
Select proper route to follow	44	2.1
Load and unload items	84	2.9
Mean Rating	65.7	2.5
Ordering and Purchasing Parts and Other Consumable Merchandise		
Determine how many parts should be ordered.	88	2.8
Determine what parts should be ordered.	86	2.8
Determine when parts will be needed	83	2.7
Determine the maximum and minimum quantities of parts to be kept in stock.	86	2.7
Assess the seasonality of the part for ordering purposes.	77	2.5
Evaluate the average sales of various parts for the previous year	69	2.3
Prepare weekly stock orders	61	2.2
Prepare pre-season or seasonal orders	72	2.6

TABLE VI (Cont.)

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE OF SPECIFIC TASKS

TASK STATEMENTS	Percent Performing	Average Level of Importance
Prepare mail parts order for breakdown or emergency repairs	72	2.5
Prepare special merchandising orders	69	2.3
Prepare fill-in orders for mail requesting stocked and non-stocked items	61	2.3
Round out orders to make maximum use of discounts available	72	2.5
Interpret stock order agreement between dealer and the company	50	2.1
Check inventory file for reorder cards	58	2.2
Remove reorder cards	52	2.0
Calculate transportation charges for parts	52	2.2
Analyze the market for parts-stocking purposes	52	2.1
Prepare daily stock order	27	1.7
Prepare monthly stock order	58	2.4
Use a pre-season control formula for determining high-activity parts to be ordered	47	2.1
Use manufacturer's emergency parts ordering system for machine-down orders	83	2.7
Mean Rating	65.5	2.4
Returning Parts		
Complete special credit forms for returning parts	80	2.8
Determine amount of parts that may be returned	77	2.7
Determine when surplus parts may be scheduled for return	75	2.7
Identify surplus parts and parts that may be returned	83	2.8
Inspect condition of parts to be returned	83	2.7
Pack parts to be returned	83	2.7
Ship parts to service depot by appropriate means	80	2.7
Mean Rating	80.1	2.7
Inspecting and Diagnosing Parts and Equipment Malfunctions		
Assess the influence damages or breakages in specific parts will have on the operating performance of the equipment	58	2.2
Determine potential causes of equipment failure from customer's descriptions	66	2.1
Diagnose potential causes of equipment failure from symptoms observed on damaged or broken parts	66	2.2

TABLE VI (Cont.)

PERCENTAGE PERFORMANCE AND AVERAGE RATING OF IMPORTANCE OF SPECIFIC TASKS

TASK STATEMENTS	Percent Performing	Average Level of Importance
Inspect parts for damage.	72	2.4
Interpret maintenance procedures for customers to prevent operating problems	58	2.2
Recommend appropriate parts needed to correct equipment malfunctions	63	2.4
Mean Rating	63.8	2.3
Planning and Organizing the Parts Department		
Organize a parts inventory system	69	2.5
Organize a parts storage system	75	2.7
Mean Rating	72.0	2.6
Summarizing and Analyzing the Parts Operation		
Analyze monthly parts operation report.	44	2.1
Analyze parts department daily computer printouts from manufacturer's regional service center	25	1.8
Mean Rating	34.5	2.0