DEVELOPMENT AND EVALUATION OF INVENTORY CONTROL AND MERCHANDISE ANALYSIS LEARNING GUIDES FOR SMALL APPAREL SHOPS

By

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DEVELOPMENT AND EVALUATION OF INVENTORY CONTROL

AND MERCHANDISE ANALYSIS LEARNING GUIDES

FOR SMALL APPAREL SHOPS

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CHAPTER I

INTRODUCTION

The independent retailer needs many skills to survive in today's highly complex, competitive business environment. According to Tate, Megginson, Scott and Trueblood (1975, p. 11) "the threat of failure is ever present for the small business."

The United States Department of Commerce (1976) reported that approximately 90 percent of the retail establishments in the United States are small operations with annual sales of less than $300,000 and two-thirds have fewer than four employees. Small specialty shops for women with annual sales of less than $500,000 represent 95 percent of the total volume sales and 58 percent of the total number of women's apparel stores in the United States (The Conference Board, 1972-73). The growth pattern for retail sales in apparel stores is expected to continue.

Broom and Longenecker (1975) reported that the root cause for failure of small businesses was managerial incapacity rather than fraud, neglect and disaster which account for relatively few failures. "Over 73 percent of the 1972 failures occurred in firms having less than $100,000 in liabilities," according to Broom and Longenecker (1975, p. 62) with men's and women's ready-to-wear having the highest failure rate for retailing firms.

The Small Business Administration (SBA) publication on Management Assistance (1976) emphasized that small business owners today must use modern methods to meet their competition.

> It is estimated that managerial deficiencies cause nine out of ten business failures. This represents a tremendous loss to the nation's economy. Many of these business failures could have been avoided had the owners received management assistance in time (1976, p. 1).

Some assistance is available for retailers. The United States Bureau of Census provides statistical abstracts of potential market areas. Free professional advice concerning market research can be obtained from local offices of the SBA. The principal functions of the SBA are to make it easier for owners of small firms to borrow money and to provide management assistance.

Kierulff (1975) noted a new frontier available for individuals and recognized organizations such as the SBA and Center for Venture Management which provide research in entrepreneurship. However, education for the small business owner-manager was described by Kierulff as "woefully inadequate" (1975, p. 43). Further research and education is needed for small apparel merchants to successfully compete in today's retailing world.

Statement of Purpose

The purposes of the study were to develop and evaluate training guides to aid the small apparel merchant in the development of effective inventory control systems. The three objectives of the study were to:

1. Develop learning guides related to selected inventory control plans for small apparel retailers.

2. Evaluate the learning guides during a workshop for small apparel retailers at the Dallas Apparel Mart, May 24, 1979.

3. Develop recommendations for improving the learning guides and make selected revisions.

Limitations of the Study

Two limitations related to the study were:

1. The content of the learning guides was limited to inventory control concepts applicable for small apparel merchants.

2. Participants for the pilot study workshop were limited to the 65 retailers enrolled in the Pre-Market Retailers' Workshop at the Dallas Apparel Mart, May 24, 1979.

Assumptions

Two assumptions made in regard to the study were:

1. Small apparel merchants have common needs in terms of management and control of inventories.

2. Systematic records of inventory purchases and sales can provide merchandise information needed by small apparel merchants.

Background of the Study

On August 24, 1978, a Pre-Market Retailers' Seminar was held at the Dallas Apparel Mart. There were 102 participants representing 74 stores in the central part of the United States. Two faculty members and one graduate assistant from the Clothing, Textiles and Merchandising Department at Oklahoma State University conducted the seminar in conjunction with the American Fashion Association (AFA), an

organization of apparel manufacture representatives in the Dallas Market.

The topic for the Pre-Market Seminar was Merchandise Management and Control with content designed to meet the requests and needs of small apparel merchants. A survey of the participants indicated that 95 percent had no formal education beyond high school and had obtained retail training primarily from seminars at the Dallas Market. Most retailers were from individually owned small specialty stores and had been in business less than five years.

The retailers expressed an interest in more in-depth seminars on specific topics such as inventory control, open-to-buy, markup and markdown and other merchandise control systems. The learning guides in this study were designed to fulfill these specific needs.

Definition of Terms

The following terms were used in the study:

Unit Control - An organized method of recording and reporting the individual and cumulative sales and stock figures by units of merchandise.

Evaluation - A process assessing the use of the learning guide.

Evaluation Instrument - A rating scale used by the adult trainees to assess the effectiveness of the learning guides developed in the study.

Apparel Retailers Advisory Committee (ARAC) - This committee was made up of small apparel merchants selected by representatives of the American Fashion Association which sponsored the workshop.

Performance Objective - Explicit statement to describe what the trainee would be able to do upon completion of each content segment within a learning guide.

Terminal Objective - Explicit statement to describe what the trainee would be able to do upon completion of each learning guide.

Small Apparel Retailer - Retail apparel merchant whose annual retail sales volume does not exceed $500,000.

Learning Guide - For the purpose of this study, each learning guide included definitive information about a selected topic, an example and a mini-problem designed to assist the learners in understanding the concepts related to each performance objective.

Role Model Apparel Retailer - Owners of small apparel shops who served as consultants for the writer in the development of the learning guides. Included in this group were the available ARAC members and other selected apparel merchants.

Research Team - Laura Kendrick and Debby Strickland, graduate students in the Clothing, Textiles and Merchandising Department, and Dr. Kathryn Greenwood, professor and research project director for the Dallas Apparel Mart Retailers' Workshop, May 24, 1979.

CHAPTER II

REVIEW OF LITERATURE

The small firm remains a dominant factor in the United States and the western world as far as the number of business units, the volume of business and the percentage of paid employment. The big firm is the exception and not the rule. Compared to other kindred businesses retailing has the largest percentages of small firms (Steinhoff, 1974).

Authorities on small business (Batchen, 1968; Gross, 1974; Tower, 1976) support the fact that healthy small businesses are the key to our nation's vitaility. LeGrand (1978) discussed the need to study the problems peculiar to the small business community. The review of literature has been organized into the following major topics: Small Businesses, Retail Problems, Characteristics of Adult Learners, Learning Materials and other related research.

Small Businesses

The Small Business Act, passed by Congress in 1953, defined a small business as one which is independently owned and operated and not dominant in its field of operations. Advantages of a small firm cited by Steinhoff (1974) emphasized the flexibility and personal and professional services offered, but pointed out disadvantages such as the inability of the small business to cope with monopolistic practices.

Small business owners are forced to seek modern methods to compete successfully today. They are seeking out information and counsel which will help them improve their management skills and productivity.

The Small Business Administration (SBA) provides management assistance, counseling and training and sponsors management training seminars for the owners of small businesses. Under the SBA the Service Corps of Retired Executives (SCORE) offers management assistance voluntarily to owners of small businesses. The Small Business Institute program involves graduate and undergraduate students in business administration in helping owners of small business to solve operational problems. One day workshops are sponsored by the SBA for busy owner-managers of small businesses.

The SBA currently publishes over 300 publications on a variety of management subjects (Gross, 1974). In 1974 small business loans were estimated at 2.6 billion (Gross, 1974). Towner (1976) noted that surveys show a significant portion of the small business community is not aware of the assistance available through existing SBA programs.

Retail Problems

Apparel stores invariably make Dun and Bradstreet's annual list of the top ten types of business failures. Batchen (1968) cited the most common reason for business failure as lack of experience resulting in poor management. The small store casualty list grows as the competition increases.

The United States Department of Commerce (1978) reported that profitability for small stores was a major problem. The absence of strong fashion trends, particularly in women's wear, resulted in

uninspiring financial results. Industry sales rose only six percent in 1977 after rising 13 percent in 1976. New profits rose to 3.7 percent in 1977 from 3.4 percent in 1976 (U. S. Dept. of Commerce, 1978).

A retailer's stock of merchandise represents a major investment and every caution must be taken to keep it from becoming a major liability. Batchen (1968, p. 9) cited that

> . . . the retailer must walk a tightrope between overbuying and underbuying; between having too large an inventory that can't be moved fast enough and too limited an inventory that fails to offer customers an adequate choice.

Changes in retailing will continue to create heavier demands on merchants. Far more data about kinds of merchandise sold will be available in the future and the important elements of this information must be processed and utilized (Dickinson, 1978). Future retail executives will have to be more skilled in the processing of data. Merchandise sales and consumer data must be developed into useful management information systems. Dickinson (1978) stressed that future executives should develop an acute sense of trends based on statistical analysis.

Certain facts about the merchandise are important for retailers to record in order to plan and manage the continued growth of the business. Troxell (1976) cited eight possible sources of information used for collecting inventory data: date of order, department number, classification of merchandise ordered, vendor's name and address, number and description of each style ordered, cost and retail prices of each style ordered, quantities of each style and details of color and size in each style.

Each retailer must determine the best type of inventory systems based on the nature of the merchandise. The checklist system is used

when the merchandise can be counted against records using a basic stock figure. With the checklist the retailer indicates a maximum (or model) stock level for each item, and an order is placed for the difference between this maximum and the actual stock count (Wingate and Samson, 1968). For fashion goods sudden changes in demand for some styles make it necessary to check the stock daily. Inventory reports are used to compile daily sales information recorded on the sales tickets. Retailers can collect the kinds of information they need to make merchandising decisions (Wingate and Samson, 1968). Computer services are also available to small apparel merchants. Some computer services operate according to the amount of sales volume or the services used. Available services for small apparel merchants include: accounts payable and receivable; daily transactions; customer monthly statements; sales check list; and month-to-date activity.

Characteristics of the Adult Learner

Knowles (1978) reported that the adult learner had become a neglected species. Very little thinking, investigating and writing about the adult learner has taken place. According to Chamberlain and Kelly (1975) the adult learner has special considerations and needs. The majority of adult education is done on a voluntary basis. To continually meet the needs of the adult learners it is imperative to maintain their interest. The material presented must be important to participants and must be presented in a positive and accepting atmosphere with less structured discipline (Chamberlain and Kelly, 1975). New concepts must be presented in a way that does not disturb long-established habits and attitudes. Adults may feel threatened about

changing from one instructional method to another. The thoughts and ideas of the adult learner should be handled with objectivity and individual contributions and viewpoints should be respected.

Adult learners have a greater capacity for attention for longer periods of time than adolescents and they are more likely to select and work toward long-range goals. Adult groups are likely to contain the same range of personality types as adolescent groups, but the adult may be less spontaneous and perhaps more reluctant to participate in group activities. Chamberlain and Kelly (1975) cited three basic principles involved in adult education: positive motivation, creative experiences and stimulating student-teacher interaction. Kreitlow (1976, p. 239) summarized adult learning patterns by stating "with such a variety of learning patterns for different kinds of adults, the adult educator has a real challenge."

Learning Materials

Learning materials for adult education programs have three specific requirements according to Grotelueschen (1976). First, the content must meet the individual needs of the learner and thus, reflect proper instructional strategies. Secondly, the materials must be utilized in an appropriate instructional setting; anything too complex will be ineffective. As a final consideration, adult learning materials must have an appealing presentation and they must be conducive to the concepts in the program.

The National Advisory Council on Adult Education (1972) pointed out that adult opportunities were limited by the emphasis on age limits. The diverse needs of adults should be reflected in career

education models.

One method of handling the adult learner involves the open entry-open exit approach. This method allows the learner flexibility to begin an educational program as individual needs require and to leave the program when the established objectives have been accomplished (Paulsen and Berg, 1976).

Research directed by Greenwood and Pestle (1977) identified barriers to the implementation of open entry-open exit type programs at the secondary and adult educational levels. At the adult level the lack of learning materials which could be used in such programs was identified as a major barrier.

Another area of emphasis in adult education programs is competency-based instruction. Specific competencies must be identified and statements formulated to indicate what the learner will be able to do upon completion of the programs.

Kotaska and Dickinson (1975) stressed the increasing importance of individualized instruction in adult education programs. The learning needs of adults who are unable or unwilling to engage in group methods should be considered in developing individualized learning materials.

Carson (1975) pointed out that instructional materials for adults should stress readability on the level of the learner. Personal words and sentences should be used to keep the reader's attention.

Grotelueschen (1976) discussed factors that constitute high quality instruction and the complexities of developing effective adult education programs. He stated that there are four contexts in adult basic education: classroom, local program, state and federal. Each context has different responsibilities, different impact on the quality

of instruction offered in adult basic education programs, and different evaluation and information needs.

Evaluation should be considered as one of the tools a competent educator uses to study and improve program practices. Educational programs are evaluated for three reasons: the program financial structure demands it; to justify the existence of the program; and to improve or change the program.

The importance of continually evaluating the adequacy of the setting in which the program is conducted was stressed by Groteluesch en (1976, p. 119), who stated:

> Aspects such as physical facilities, type of neighborhood, proximity to target population and social climate contribute to the perception various publics (teachers, participants, community members, institutional representatives) have about the program.

Other Related Research

Peavler (1977) developed learning materials for high school students working in apparel stores. This study was part of the research project directed by Greenwood and Pestle and funded by the United States Office of Education (Greenwood and Pestle, 1977).

Apparel shop entrepreneurship learning materials were developed by Cremer and LeMay in conjunction with a USOE project directed by Greenwood, Callsen and Mott (1978). This material focused on assisting adults in the preparation of specific plans for opening an apparel shop. LeGrand (1978) found that the greatest number of problems reported by owners or managers of apparel stores were in the areas of buying and merchandising. Specifically, three-fourths of the responses in the survey indicated that returning merchandise to the

vendor was a problem and two-thirds of the respondents considered delays in receiving new merchandise were definitely a problem.

Diggs' dissertation (1978) focused on evaluating individualized instructional materials developed for use by potential apparel shop entrepreneurs. Role model merchants were used as evaluators for the purpose of the Diggs study. One of the objectives of the study was concerned with the evidence of achievement or lack of achievement of the behavioral objectives specified in the learning materials.

The literature search was extended, for the purposes of this study, to include factual information related to the content of the learning guides. The additional sources are referred to in the procedures described in Chapter Three.

Summary of Literature

Within this chapter, selected literature was discussed with respect to the development of learning materials for small apparel retailers. The discussion provided factual information about the advantages and disadvantages of small businesses. The role of the Small Business Administration was defined. The retail problems presented related specifically to inventory control and merchandise analysis for the small retailer. Types of inventory systems were discussed in relation to the small apparel merchant.

Consideration was given to the importance of designing learning materials to meet the specific needs of adult learners. Some of the problems with adult learning materials were identified and types of suitable learning materials were discussed. Characteristics of the adult learner were identified and special consideration was given to

the differences in adult learning modes. The presentation and appearance of the learning materials in relation to the adult learner were discussed. The review of additional studies related to the development of instructional materials for adult learners, specifically small apparel shop owners.

CHAPTER III

METHODS AND PROCEDURES

Inventory control is a necessity for a successful retail operation. The apparel business requires a flexible inventory control system which can adapt readily to new fashion trends as reflected within seasonal possibilities. The study is an attempt to provide the small apparel merchant with useful information about inventory control systems.

The procedures used in the study are discussed in relation to the three objectives:

1. Develop learning guides related to selected inventory control plans for small apparel retailers.

2. Evaluate learning guides during a workshop for small apparel retailers in the Dallas Apparel Mart, May 24, 1979.

3. Develop recommendations for improving the learning guides and make selected revisions.

Development of the Learning Guides

Procedures for objective one involved the development of learning guides related to selected inventory control systems. The schematic drawing in Figure 1 depicts the process the research team formulated to guide the development of the learning guides. The writer followed the step-by-step process for the purposes of the study.

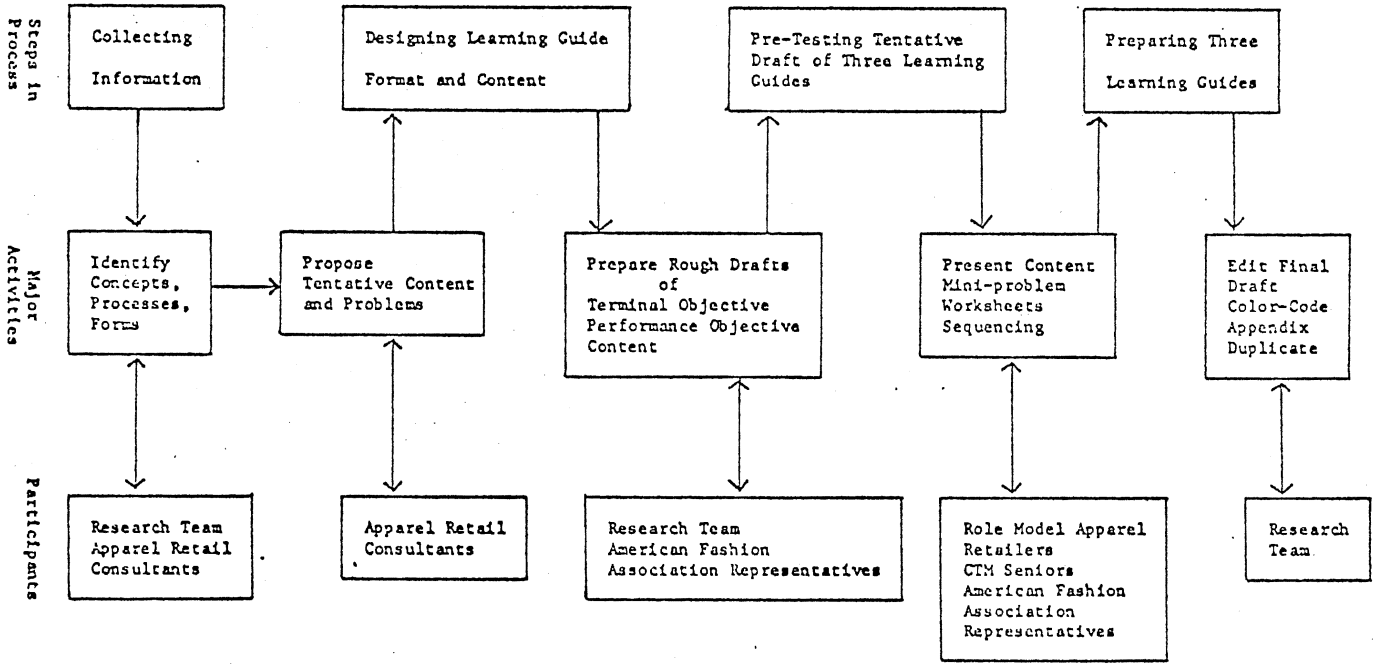

Figure 1. Schematic Presentation of the Process Developed to Determine the Format and the Content and to Prepare the Learning Guides

Collecting Information

Definitive information was collected about several topics related to inventory control: unit control; merchandise classification; style and resource performance; visual, perpetual and periodic control; and evaluation forms. A system was devised to combine all related research on each of the topics. Sources included references by authorities in the retail merchandising field listed in Appendix A. Other sources of literature in the field were materials from the Small Business Administration, National Retail Merchants Association, American Fashion Association and materials produced by publishers of record keeping forms. Role model apparel retailers were utilized as a reference source. These apparel retailers reviewed the progression of the learning guides and provided feedback as to the feasibility of using the learning guides in actual retail operation. Personal interviews with three selected apparel merchants provided additional information about various kinds of inventory records and systems. Consultants, advisory groups and interview questions are included in Appendix B.

The needs expressed by the participants in the previous Pre-Market Retailers' Seminar in Dallas (August, 1978) were used in selecting topics for the learning guides. Examples of comments are provided in Appendix C.

The process used to select definitive information about the concepts related to unit control systems for small apparel merchants was:

1. Collect factual information and key words concerning each concept.

2. Develop examples and problems related to concepts to illustrate the information.

3. Develop mini-problems to aid the learner in actually working with the concept.

4. Design worksheets to help the learner understand the cluster of concepts in the learning guides.

A file system was used to organize types of inventory records used by small apparel merchants. Some examples of kinds of record forms collected were: computer systems; physical inventory; vendor performance; daily report of item activity; sales slip; dollar summary; stock cards; initial order forms; price tags; and price line record forms.

Designing the Learning Guides

Tentative ideas for the content of the learning guides were examined by several members of the American Fashion Association at the Dallas Apparel Mart on January 22, 1979. Based on the reactions of this group, the following directions were proposed to aid in the development of the learning guides:

1. Title - select topic of each learning guide.

2. Terminal objective - clarify a cluster of concepts included in each learning guide.

3. Performance objective - clarify each concept related to the terminal objective.

4. Content - define terms and phrases related to each concept; underline headings, subheadings and key words.

5. Example - illustrate how to use concepts to achieve the performance objective.

6. Mini-Problem - simulate a problem to give the learner an opportunity to apply the concepts in each performance objective.

7. Worksheet - design an exercise to enable the learner to achieve each terminal objective.

Participants of the first Pre-Market Retailers' Seminar (August, 1978) were sent letters and a reaction sheet to obtain suggestions concerning the second pre-market workshop (May, 1979). Examples of the letter and a reaction sheet are in Appendix D.

Pre-Testing Activities

Five selected apparel retailers were asked to review a rough draft of the learning guides and make constructive comments. Suggestions concerning the merchandise classification and purchase order records were considered and revisions were made in the rough draft. Copies of the revised learning guides were reviewed by representatives of the Apparel Retailers Advisory Committee. The president of the American Fashion Association reviewed the material during a meeting at the Dallas Apparel Mart, March 31, 1979. Suggestions and questions pertained to the length of the learning guides, the simplification of the inventory control forms and the inclusion of merchandise classifications. Ideas for presentation of the learning guides during the workshop were also discussed. Revisions were made in the learning guides as a result of the meeting. The revised learning guides were pretested by a selected group of five apparel retailers from Oklahoma City on April 9, 1979. Criteria for the selection of the merchants included: in business less than three years; less than $300,000 annual retail sales volume; and owners of ladies ready-to-wear shops.

The reactions of the apparel retailers to the learning guides during the pre-test were supportive of both the content and the format.

Minor changes included the addition of style cards to the Perpetual Control learning guide.

The learning guides were reviewed by 21 seniors in the Clothing, Textiles and Merchandising Department at Oklahoma State University. Irregularities in procedures, instructions, presentation techniques and timing were noted by the writer.

Preparing the Learning Guides

The research team reviewed the learning guides and made final decisions based on the results of the preceding procedures. The format was condensed to two pages for each performance objective and the worksheet was simplified to one page. A color code for the worksheet was established for duplication purposes.

Evaluation of the Learning Guides

The procedures for objective two involved the evaluation of the learning guides during a workshop for small apparel retailers in the Dallas Apparel Mart, May 24, 1979. The learning guides were evaluated by the 65 participants in the workshop. Positive as well as negative reactions were obtained to evaluate the effectiveness of the learning guides. The writer used the process depicted in the schematic presentation in Figure 2 as a guide in the evaluation and revision of the learning guides.

Developing the Instruments

Evaluation instruments were developed to obtain the reactions of the workshop participants to each of the three learning guides. One

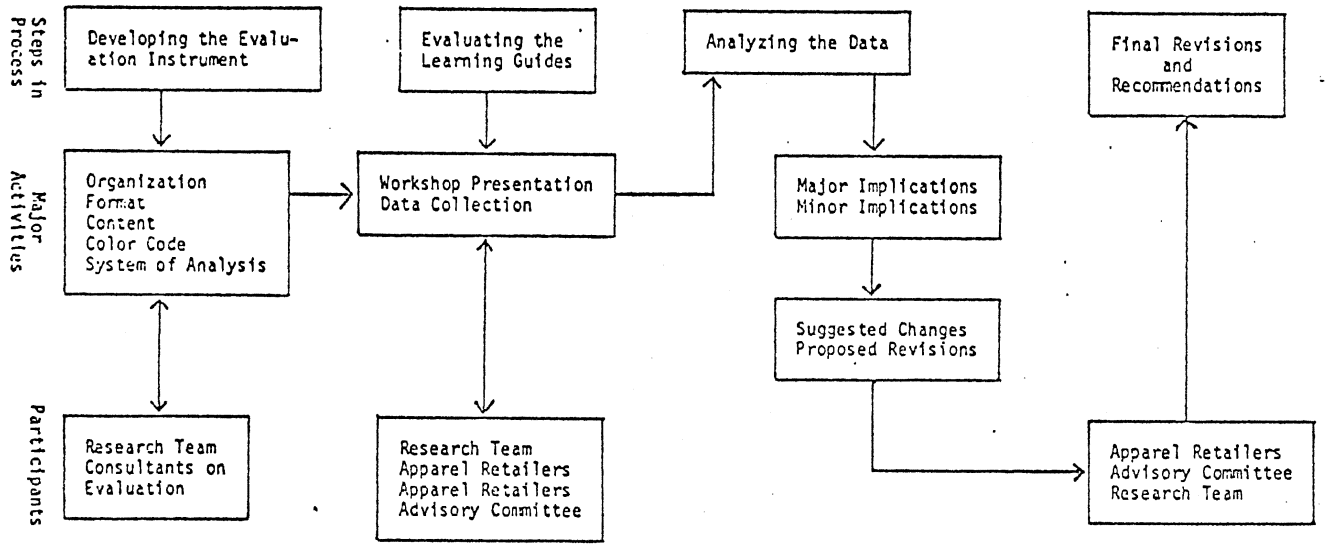

Figure 2. Schematic Presentation of the Process Developed to Evaluate and Revise the Learning Guide

section of the evaluation instrument pertained to the performance objectives. Two questions were asked about each performance objective: one concerning the participants' understanding of the information and example, and one related to the completion of the mini-problems without errors.

The second section of the evaluation form was concerned with the achievement of the terminal objective. The participants' reactions to the worksheet were obtained and space was provided for additional comments. A copy of the evaluation instrument for each of the three learning guides is in Appendix E.

The overall evaluation instrument developed by the research team for the total workshop included several questions which were used in evaluating the Inventory Control and Merchandise Analysis learning guides. A copy of the instrument used for the Evaluation of the Total Workshop is in Appendix F and the questions pertaining to Inventory Control and Merchandise Analysis has been circled.

Evaluating the Learning Guides

During the workshop the writer presented the information and examples for each performance objective using the overhead projector. The participants were then asked to complete the mini-problem according to the instructions. The answers to each mini-problem were presented on the overhead projector and the participants were asked to circle all incorrect answers with a red pencil. The worksheet corresponding to each terminal objective was completed by the participants. Time was allotted for each participant to respond to the questions on the evaluation instrument after the completion of each of the three

worksheets. The three evaluation instruments were collected from each participant after the Inventory Control and Merchandise Analysis Session of the workshop was finished.

Analyzing the Data

The responses to the questions on the three evaluation instruments were coded and a computerized analysis was made of the frequencies and percentages of responses. The mean scores were calculated for the responses using the following formula:

Yes - 1

Uncertain - 2

No - 3

A list of positive and negative reactions was compiled based on the additional comments on the evaluation forms and the reactions on the evaluation of the total workshop.

In addition a descriptive profile was prepared of the kinds of stores represented by the participants including information about store location, size of store and type of merchandise, and length of time the store had been in business. A copy of the Pre-Workshop Survey used to obtain this information is in Appendix G. The data were obtained from participants from 50 of the 58 stores represented at the workshops.

Revision of the Learning Guides

The procedures for objective three were concerned with the analysis of the data and the revision of the learning guides. Following is a summary of the procedures:

1. The data for each learning guide were reviewed. The mean scores were compared with the percentage scores and were not considered to contribute negatively to the evaluation. Therefore, only the percentages for the yes, no and uncertain responses were included in the tables for the purpose of reporting the findings and drawing implications for change.

2. The tables were studied in relation to the responses for each performance objective and each terminal objective. The following criteria were established as a basis for drawing implications for changes. The data were reviewed and the percentages were arbitrarily used to indicate the need for major and minor changes.

Major implications for changes were drawn if the percentage of yes responses to a question was below 70 percent.

Minor implications for changes were drawn if the percentage of yes responses to a question was between 70-84 percent.

No implications for changes were drawn if the percentage of yes responses to a question was 85 percent or above.

3. Each learning guide was reviewed in relation to the implications for changes for each performance objective and the terminal objective. Procedures for formulating final recommendations for revisions were established by the research team and are summarized in Figure 3. A tentative list of suggested changes was compiled by the writer to correspond with the major and minor implications drawn. Kinds of suggested changes which were considered included: additions to the factual information clarification or expansion of the example improvement of the instructions or format of the mini-problems and worksheet. Criteria and procedures used to formulate suggested

changes are summarized in Appendix H.

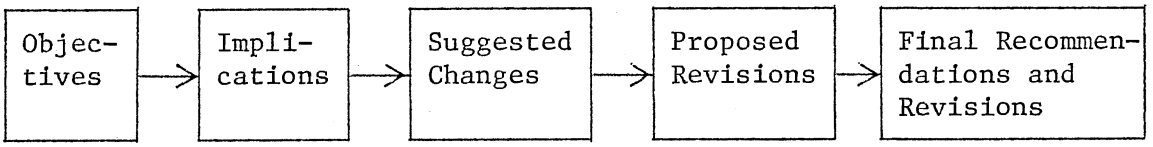

Figure 3. Process Developed to Use in Formulating Final Recommendations for Revisions in the Learning Guides

4. Proposed revisions were formulated based on suggested major and minor changes in the learning guides. Examples were prepared for four of the proposed revisions.

5. The five members of the Apparel Retailers Advisory Committee Group and a representative of the American Fashion Association were asked to react to the proposed revisions in the learning guides. A copy of the letter and proposed revisions including the examples prepared by the writer appear in Appendix I. The writer had a telephone conference with each of the five Apparel Retailers Committee members and tabulated their responses to the proposed revisions.

The final recommendations for major and minor revision of the learning guides were developed and considered by the research team. Four selected revisions were implemented by the writer.

CHAPTER IV

FINDINGS AND RESULTS

The major purposes of this study were to develop and evaluate learning guides to be used to assist small apparel shop owners in inventory control and merchandise analysis. The three objectives related to this study were organized as follows:

1. Develop learning guides related to selected inventory control plans for small apparel retailers.

2. Evaluate the learning guides during a workshop for small apparel retailers at the Dallas Apparel Mart, May 24, 1979.

3. Develop recommendations for improving the learning guides and make selected revisions.

The findings and results are discussed under the following headings: content and use of the learning guides, description of the participants, evaluation of the learning guides and revisions for the learning guides.

Content and Use of the Learning Guides

In Table I the format and content are presented for the learning guides on Inventory Control and Merchandise Analysis. The content of the learning guides included factual information, an example, and a mini-problem pertaining to each performance objective. Each learning guide was concluded with a worksheet which related to the terminal

TABLE I

TOPICS AND OBJECTIVES FOR LEARNING GUIDES FOR
INVENTORY CONTROL AND MERCHANDISE ANALYSIS

Topics	Terminal Objectives	Performance Objectives
Perpetual Control	To initiate a perpetual inventory system that will be suitable for major merchandise classifications.	1. Complete a price ticket given the information from the purchase order. 2. Record on the purchase order merchandise received and sold. 3. Record on the purchase order merchandise marked down and returned.
Periodic Control	To identify physical inventory control systems which are appropriate for certain merchandise classifications according to percentages.	1. Apply visual inventory control to some merchandise classifications. 2. Apply a periodic control method (physical count) for inventory purposes. 3. Summarize the breakdown of the inventory into classifications by percentage.
Merchandise Analysis	To analyze the performance records of resources.	1. Analyze the stock shortages, slow sellers and runners from the information recorded on the purchase order. 2. Evaluate the performance of resources based on markdowns, returns, sales, etc.

objective. An example of the content and format for each learning guide is included in Appendix J. The content for the performance objectives in each learning guide is described in the following discussion.

Perpetual Control

Performance objective one pertained to the manner in which a price ticket was used as a part of the perpetual control system. Certain facts about recording the history of the merchandise and the various sources for collecting information were discussed. The example included a purchase order and a price ticket illustrating how the data collected from the purchase order could be transferred onto the price ticket to maintain a perpetual control system. A mini-problem followed the example in order to give the participant an opportunity to work a problem in which information from an actual purchase order was transferred to a blank price ticket.

Performance objective two included instructions for recording on the purchase order information about merchandise received and sold at full retail price. The example illustrated a system for checking the purchase order to indicate each style as it was received and slashing across each size as it was sold at full retail price. The mini-problem involved the recording of transactions of merchandise received and sold on a purchase order. The participants were asked to answer questions concerning the number of items ordered, received, sold at full retail price or left in stock.

Performance objective three pertained to the recording of transactions of merchandise sold at markdown, merchandise which the retailer

returned to the manufacturer and merchandise customers returned to the retailer. The example presented a purchase order indicating transactions of merchandise sold at markdown with a red slash across each item. A red R was used to indicate merchandise returned to stock and a red RM for merchandise returned to the manufacturer. The mini-problem included a purchase order example and the participant was asked to answer questions concerning the transactions indicated on the purchase order, such as, how many items were sold at the markdown, returned to stock, or returned to the manufacturer.

The worksheet related to the terminal objective for the learning guide. All of the transactions were combined on a purchase order example and the participant was asked to answer questions about merchandise received, sold at full retail price, sold at markdown, returned to stock and returned to the manufacturer. A copy of the worksheet for the Perpetual Control learning guide is in Appendix K.

Periodic Control

Performance objective one explained the visual control of merchandise as a particular kind of inventory system. The example provided a story relating how a small apparel merchant used visual control for evening wear which was limited in the number of units. A mini-problem followed describing a particular stock situation for a store in which visual control was used. The participants were asked how a stock shortage could be handled given the situation with several possible answers.

In performance objective two another type of inventory control, physical count, was discussed. Emphasis was placed on counting the

stock at regular intervals and designating inventory controls according to the nature of the merchandise. An example indicated how a stock card could be used for periodic counting of basic types of merchandise which might be found in a small apparel store. The participants were given a mini-problem with a case study of a small apparel shop. Questions were asked about the merchandise that was reported on the stock card, including merchandise that was selling fast or slow and the exact quantity in stock.

Performance objective three was concerned with the actual breakdown of merchandise classifications by percentages. The discussion of classifications and sub-classifications pointed out that the end function or a season designates the merchandise classification to which the item belongs. An example was given of a typical merchandise breakdown in a small apparel shop and the major and sub-classifications of the total inventory.

The worksheet related to the terminal objective for the learning guide. An instruction sheet described how to answer the worksheet by inserting percentages for classifications in the participant's own store. Participants were asked to answer questions about the use of visual, periodic and perpetual control methods for inventory control. The worksheet included a list of merchandise classifications with blank columns and each participant was asked to indicate the percentages of merchandise for each classification in their store. A copy of the worksheet is in Appendix K.

Merchandise Analysis

Performance objective one described merchandise analysis in terms

of stock shortages, slow sellers and fast sellers or runners. The information summarized the records kept on the purchase order. The example presented a purchase order illustrating the transactions which had been discussed in the Perpetual Control learning guide. In the mini-problem, the participants were asked to identify which styles were slow sellers, which were runners and how many items were still in stock.

Performance objective two included a summary of all the data collected from the purchase order transactions and evaluated resources from the data. The example of a purchase order indicated merchandise that had been received, sold at full retail price, sold at markdown, returned to stock, returned to the manufacturer, and the quantity of merchandise on hand. These transactions were tallied and percentages were calculated based on the total received. The mini-problem gave the participants several styles to evaluate according to the transactions discussed.

The worksheet, related to the terminal objective, combined information about several resources into a Resource Performance Report and the participant was asked to rank each resource in numerical order according to overall performance. A copy of the worksheet is in Appendix K.

Description of the Participants

Sixty-five retailers participated in the workshop, and 58 stores were represented. Three stores had more than one person attending the workshop. Retailers from ten states were present at the workshop, including Arkansas, Kansas, Louisiana, Minnesota, Mississippi,

Missouri, New Mexico, New York, Oklahoma and Texas. Characteristics of the participants from the Pre-Workshop Survey are presented in Table II.

The largest group of participants (47%) indicated that their stores were located in the downtown area but a sizable group (39%) were in a mall or shopping center. The largest single group of stores (25%) were located in a population area of over 100,000. Over half of the participants (51%) represented stores which maintained an annual sales volume of $100,001 - $300,000. Of the total group of stores, only 13 percent had an annual sales volume of over $300,000. The majority (59%) had two or fewer full-time employees and 63 percent had two or fewer part-time employees. Seventy-two percent of the stores had junior size ranges and 66 percent had misses sizes. Some retailers indicated that both categories were carried in their stores. The greatest majority of the stores had moderate (92%) or better (60%) price lines, and some carried more than one price range. Almost one-half of the stores (48%) had been in business less than two years, and 75 percent had been in business less than four years. The square footage of selling space in a majority (71%) of the stores was under 2099 square feet.

Evaluation of the Learning Guides

The analysis of the evaluation data and the revisions were related to the performance objectives and the terminal objective for each of the three learning guides: Perpetual Control; Periodic Control; and Merchandise Analysis.

TABLE II

RESPONSES OF PARTICIPANTS TO THE PRE-MARKET SURVEY AT THE WORKSHOP, DALLAS APPAREL MART MAY 24, 1979 (N=50)

Information	N[a]	%
1. Store Location of Seminar Participants		
Downtown	23	47
Mall or Shopping Center	19	39
Other[b]	4	14
2. Approximate Size of Town or City Where Store Are Located		
Below 5,000	2	4
5,000 - 10,000	12	21
10,001 - 25,000	8	14
25,001 - 50,000	8	14
50,001 - 75,000	8	14
75,001 - 100,000	4	7
Over 100,000	14	25
3. Size of Store in Terms of Annual Sales Volume		
$100,000 or less	16	36
$100,001 - $300,000	23	51
$300,001 - $500,000	1	2
$500,001 or More	5	11
4. Size of Store in Terms of Full-Time Employees		
1	15	38
2	8	21
3	7	18
4	4	10
5 - 10	3	8
11 or More	2	5
5. Merchandise Classification[c]		
Coats	25	50
Dresses	48	96
Sportswear	50	100
Lingerie	37	74

TABLE II (Continued)

Information	N	%
6. Size Ranges		
Junior	36	72
Misses	33	66
Women's	15	.03
Other[d]	8	.14
7. Price Lines		
Budget	3	.06
Moderate	46	92
Better	30	60
8. Length of Time Stores Have Been in Operation		
Less than 1 Year	12	22
1 - 2 Years	14	26
3 - 4 Years	9	17
5 - 10 Years	11	20
10 - 20 Years	5	15
9. Approximate Size of Store in Terms of Square Footage of Selling Space		
400 - 999 sq. ft.	11	21
1000 - 1599 sq. ft.	19	37
1600 - 2099 sq. ft.	7	13
2100 - 3999 sq. ft.	7	13
Over 4000 sq. ft.	8	15

[a]All of the participants did not complete the Pre-Market Survey, however information about 50 of the 58 stores was included in this table.

[b]Includes renovated house, neighborhood shopping area, free standing structure, office building, strip center and university area.

[c]Participants checked more than one response.

[d]Includes men's wear, children's wear and extra large sizes.

The findings were discussed in terms of percentage of responses (yes, no and uncertain) to the questions for each of the performance objectives. Evaluations were received from 56 of the 65 participants. Percentage scores were calculated for each response (yes, no and uncertain) and are reported in Appendix L. For the purpose of evaluation only the percentages for the yes answers were considered as positive responses. Answers to multiple choice questions were included in the discussion along with additional comments and questions.

Implications for changes were drawn for each performance objective and each terminal objective according to the following criteria:

Percentage of Positive Responses (Yes)	Guide for Implications
100% - 85%	No implication drawn for change
84% - 70%	Implications drawn for minor changes
Below 70%	Implications drawn for major changes

The findings related to each of the three learning guides are presented in the following discussion.

Perpetual Control

The reaction of the participants to the three performance objectives and the terminal objective in the Perpetual Control learning guide are presented in Table III.

Findings. All of the responding participants (100%) indicated that they understood the information and the example related to performance objective one. However, only 78 percent completed the price ticket correctly on the first try. The lowest percentage of participants (69%) completed the markdown and return transactions correctly

TABLE III

RESPONSES OF PARTICIPANTS TO THE QUESTIONS CONCERNING THE PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE FOR THE PERPETUAL CONTROL LEARNING GUIDE (N=56)

Objectives	Questions	N	Responses Yes %	No %	Uncertain %
Performance Objectives:					
1.	1. I understood the information and example about using purchase order information on the price ticket.	55	100	0	0
	2. I completed the price ticket correctly the first try.	55	78	22	0
2.	3. I understood the information and example about recording merchandise received and sold.	55	98	2	0
	4. I answered the questions about merchandise received and sold correctly the first try.	55	78	22	0
3.	5. I understood the information and example about recording merchandise marked down and returned.	55	89	7	4
	6. I answered the questions about the merchandise marked down and returned correctly the first try.	51	69	31	0
Terminal Objective:	9. I answered the questions about the transactions correctly the first try.	51	71	29	0
	10. I think the information will help me to initiate or improve the perpetual inventory system for my store.	55	87	11	2

on the first try in the mini-problem for objective three.

Although only 71 percent of the participants answered the questions about the transactions correctly on the worksheet on the first try, 87 percent indicated that they felt the information would help them to initiate or improve the perpetual inventory system for their store.

Other Reactions. In terms of cause of errors, five of the participants indicated that the cause of errors was due to not understanding the examples. Several participants wrote additional comments concerning the perpetual inventory system indicating that the time factor might be a problem in keeping these records, and one participant questioned why the retail price was not reflected on the purchase order. In regard to the worksheet, 46 of the participants indicated the transactions on the purchase order were easy to understand. Additional data pertaining to the comments and reactions from participants are in Appendix M.

Implications. Based on the established criteria for major and minor changes, implications were drawn for revisions of the Perpetual Control learning guide.

A major change in the mini-problem for performance objective three was indicated by Table III with only 69 percent of the participants able to work the problems correctly the first try. Minor changes were also considered for the worksheet with only 71 percent of the participants answering the questions correctly the first try.

Periodic Control

In Table IV the reactions of the participants are presented to the three performance objectives and the terminal objective in the Periodic Control learning guide.

Findings. Most of the participants (96% or higher) indicated that they understood the information and example for performance objective one and two. However, only 83 percent of the participants answered the questions about visual stock control correctly the first try. The information and example for performance objective three also fell below the established criteria with only 83 percent of the participants responding that they understood the information and example satisfactorily.

The participants had difficulty estimating their own merchandise classifications by percentages as only 36 percent responded positively (yes). The majority (77%), however, answered the questions on the instruction sheet concerning stock counts and perpetual inventory. The final responses pertaining to the terminal objective indicated that 89 percent of the participants felt that the information would help them identify physical inventory systems which would be appropriate for certain merchandise classifications.

Other Reactions. Ten participants indicated that the cause of errors was due to a lack of understanding the examples, however, none of the participants indicated that the instructions were not clearly written. Twenty-two of the participants did not make any errors. Additional comments listed in Appendix M indicated that more help was

TABLE IV

RESPONSES OF PARTICIPANTS TO THE QUESTIONS CONCERNING THE PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE FOR THE PERIODIC CONTROL LEARNING GUIDE (N=56)

Objectives	Questions	N	Responses Yes %	No %	Uncertain %
Performance Objectives:					
1.	1. I understood the information and example about the application of visual inventory control to some merchandise classifications.	52	96	0	4
	2. I answered the questions about visual stock control correctly the first try.	52	83	15	2
2.	3. I understood the information and example about the periodic control method (physical count).	51	98	2	0
	4. I answered the questions about the periodic control (physical count) correctly the first try.	50	86	10	4
3.	5. I understood the information and example about the breakdown of the inventory into classification by percentage.	48	83	4	13
	6. I answered the questions about the breakdown of the total inventory into merchandise classifications correctly the first try.	45	87	11	2
Terminal Objectives:					
	9. I was able to estimate the merchandise classification by percentages for the inventory in my store.	45	36	35	29
	10. I was able to answer the questions on the instruction sheet about stock counts and perpetual inventory.	43	77	19	4
	11. I think the information will help me to identify physical inventory systems which would be appropriate for certain merchandise classifications.	44	89	0	11

needed in determining the percentage for each merchandise classification. Thirty-four participants indicated that the worksheet was easy to understand and 16 indicated it was helpful.

Implications. Based on the criteria for major and minor changes, implications were drawn for the Periodic Control learning guide. A major change in the worksheet was indicated by Table IV with only 36 percent of the participants responding that they could estimate the merchandise classifications by percentages for the inventory in their store.

On performance objective one a minor change was considered in the mini-problem with only 83 percent of the participants responding that they could answer the questions about visual stock control on the first try. The second minor change for Periodic Control was on performance objective three with only 83 percent of the participants understanding the information and example about the breakdown of the inventory into classification by percentage. Another minor change for the learning guide was in the worksheet, only 77 percent of the participants responded that they could answer the questions on the instruction sheet about stock counts and perpetual inventory.

Merchandise Analysis

The reactions of the participants to both the performance objectives and the terminal objective in the Merchandise Analysis learning guide is presented in Table V.

Findings. In regard to objective one and two, all of the reactions of the participants (94% or higher) were above the established

TABLE V

RESPONSES OF PARTICIPANTS TO THE QUESTIONS CONCERNING THE PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE FOR THE MERCHANDISE ANALYSIS LEARNING GUIDE (N=56)

Objectives	Questions	N	Responses Yes %	No %	Uncertain %
Performance Objectives:					
1.	1. I understood the information and example about analyzing stock shortages, slow sellers and runners from the information recorded on the purchase order.	48	100	0	0
	2. I answered the questions about stock shortages, slow sellers and runners correctly the first try.	44	94	6	0
2.	3. The information and example would help me evaluate the performance of resources based on markdowns, returns and sales.	46	98	0	2
	4. I answered the questions about the Resource Performance Report correctly the first try.	44	98	2	0
Terminal Objective:					
	7. I think the information will help me to analyze the performance records of my resources.	42	98	2	0

criteria used in drawing implications for change. In regard to the terminal objectives, the majority of the participants (98%) thought that the information would help them analyze the performance records of their own resources.

Other Reactions. In terms of cause of errors, 26 of the participants responded that no errors occurred and only three responded that the errors were due to not understanding the examples. As indicated in Appendix M an additional comment from one participant was concerned with how the percentage figures for the Resource Performance Report were obtained and whether they were based on the total amount of merchandise received. Six participants indicated that the worksheet was easy to understand, and 41 responded that it was helpful. Only one participant responded that the worksheet was too complicated and one responded that the worksheet was a waste of time.

Implications. From the data indicated in Table V no implications for major or minor changes were drawn. However, based on one of the comments, consideration was given to the restating of the percentage instructions to clarify the Resource Performance Report for performance objective two.

Evaluation of Total Workshop

The overall evaluation of the total workshop included two specific sections related to Inventory Control and Merchandise Analysis. The data related to these two sections appear in Appendix N.

The participants reacted to the helpfulness of the topics in regard to the Inventory Control and Merchandise Analysis learning

guides. In the responses shown in Table VI, the percentages for strongly agree and agree were combined and indicated as positive. The percentages for tend to disagree, disagree and strongly disagree were similarly combined and indicated as negative.

TABLE VI

OVERALL EVALUATION OF THE RESPONSES TO THE THREE LEARNING GUIDES (N=56)

Topics	Number of Responses	Positive	Negative
Perpetual inventory method	53	92%	8%
Physical inventory method	53	93%	7%
Merchandise classification percentages	52	92%	8%
Resource evaluation	53	93%	7%

The largest percentage (92%) were positive in their reaction to the Resource Evaluation in the Merchandise Analysis learning guide. Eight percent of the participants had negative reactions to the perpetual inventory method and to the merchandise classification percentages.

The comments of the participants as to what they liked most about the Inventory Control and Merchandise Analysis session of the workshop

included: new ideas for inventory control; practicality for smaller shop; analysis of merchandise transactions; purchase order approach; and presentation using overhead projector.

Comments from the participants regarding what they liked least about the workshop were: information geared to small store; price ticket; merchandise classification breakdown; physical setting; and timing of presentation.

Other suggestions made by the participants regarding future workshops are summarized in Appendix O. These comments were considered in developing specific suggestions for revisions and in making recommendations for improving the learning guides.

The final evaluation presented to the participants was the Overall Evaluation of the workshop presentation as shown in Table VII. Ninety percent of the participants indicated a positive reaction to the total program.

TABLE VII

OVERALL EVALUATION OF THE TOTAL WORKSHOP
(N=56)

Topic	Number of Responses	Positive	Negative
Reactions to workshop presentation	51	90%	10%

Revision of Learning Guides

Revisions of the learning guides resulted from an analysis of the data. Implications were drawn and suggested changes were formulated according to the procedures detailed in Chapter Three. Presented in Tables VIII, IX and X is a summary of the implications drawn and a list of suggested changes formulated for each performance objective and terminal objective in the three learning guides.

Proposed revisions based on the suggested changes were prepared and the reactions of the Apparel Retailers Advisory Committee members and the representatives of the American Fashion Association were obtained in regard to each revision.

The Apparel Retailers Advisory Committee group unanimously agreed that the proposed revisions would improve the learning guides. There were no additional suggestions and no additional questions about the proposed revisions.

Based on the findings of the study and the decisions of the research team, the four proposed revisions which appear in Appendix I were recommended by the writer for incorporation into the appropriate learning guides. In addition the writer recommended the implementation of other proposed revisions summarized in Appendix I and suggested that editorial, content and format changes be made for the purpose of continuity in the three learning guides.

TABLE VIII

SUGGESTED CHANGES FOR PERPETUAL CONTROL LEARNING GUIDE BASED ON IMPLICATIONS DRAWN FROM ANALYSIS OF EVALUATION FOR EACH PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE

Objectives	Implication	Suggested Changes
Performance Objectives:		
1. Complete a price ticket from purchase order.	Minor change in information and example.	1. Rewrite merchandise information. Include more detailed content of the double ticket function, resource assigned number and retail price.
	Minor change in mini-problem.	1. Move position of price ticket to margin on bottom of page for more room. 2. Draw arrows to blank spaces for answers on price ticket.
2. Record on purchase order merchandise received and sold.	Minor change in mini-problem.	1. Restate purchase order code in instructions clearer.
3. Record on purchase order merchandise marked down and returned.	Minor change in example.	1. Restate purchase order code in instructions.
	Major change in mini-problem.	1. Restate purchase order code in instructions. 2. Add one question asking the number of markdowns that had occurred. 3. Ask the participants to transfer the answers to the worksheet.
Terminal Objective:		
Initiate a perpetual inventory system that will be suitable for major merchandise classifications.	Minor change in worksheet.	1. Restate code in more precise manner.

TABLE IX

SUGGESTED CHANGES FOR PERIODIC CONTROL LEARNING GUIDE BASED ON IMPLICATIONS DRAWN FROM ANALYSIS OF EVALUATION FOR EACH PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE

O jectives	Implications	Suggested Changes
Performance Objectives:		
1. Apply visual inventory control to some merchandise classifications.	Minor change in example	1. Rewrite example to include more merchandise transactions.
	Minor change in mini-problem.	1. Rewrite the mini-problem with more merchandise transactions.
2. Apply periodic control method for inventory purposes.	No implications drawn.	No suggested changes.
3. Summarize breakdown of inventory into classifications by percentages.	Minor change in example.	1. Include three types of stores in example.
	Minor change in mini-problem.	1. Add more categories which are more realistic. 2. Eliminate questions on instruction sheet.
Terminal Objective:		
Identify physical inventory control systems which are appropriate for certain merchandise classifications according to percentages.	Major change in worksheet.	1. Produce a new worksheet that has a problem that can be worked and evaluated.

TABLE X

SUGGESTED CHANGES FOR MERCHANDISE ANALYSIS LEARNING GUIDE BASED ON IMPLICATIONS DRAWN FROM ANALYSIS OF EVALUATION FOR EACH PERFORMANCE OBJECTIVE AND TERMINAL OBJECTIVE

Objectives	Implications	Suggested Changes
Performance Objectives:		
1. Analyze stock shortages, slow sellers and runners from information on purchase order.	No implication drawn.	No suggested changes.
2. Evaluate the performance of resources based on markdowns, returns, sales, etc.	Minor change in the example.	1. Include percentage formula.
Terminal Objective:		
Analyze the performance records of resources.	Minor change in the worksheet.	1. Add instructions on how to achieve percentages.

CHAPTER V

SUMMARY AND RECOMMENDATIONS

Inventory Control and Merchandise Analysis learning guides were developed and evaluated as a part of this study. Sixty-five apparel retailers used the learning guides in a Pre-Market Workshop at the Dallas Apparel Mart, May 24, 1979. The reactions of the participants were analyzed and implications for change were drawn. Suggested changes were developed for each learning guide. Final recommendations were based on the reactions of the Apparel Retailers Advisory Committee to the proposed revisions. Selected revisions were made in the learning guides based on the final decisions of the research team.

Learning Guides

Three learning guides were developed to aid the small merchant in inventory control and merchandise analysis. Each learning guide had one terminal objective and several performance objectives. Information, examples and mini-problems were provided for each performance objective and a worksheet was designed to correspond with the terminal objective. The Perpetual Control learning guide included the price ticket information and the use of the purchase order to record merchandise transactions. The Periodic Control learning guide focused on visual control, physical count and merchandise classification. The third learning guide, Merchandise Analysis, involved the analysis of

stock shortages, merchandise movement and evaluation of resource performance.

Evaluation instruments were developed to assess the ability of the participants to achieve the performance objectives and terminal objectives for each of the learning guides. The evaluation data were analyzed by computing mean scores and percentages of the participants' responses pertaining to the use of the three learning guides.

Summary of Findings

Sixty-five retailers participated in the workshop representing 58 stores in ten states. An annual sales volume of $300,000 or less was estimated for 87 percent of the stores, and 65 percent of the participants indicated they had been in business less than four years. The analysis of the data indicated that over one-half of the participants understood the information and examples and were able to complete the mini-problems and worksheet pertaining to two of the learning guides. However, less than one-half of the participants (36%) were able to complete the worksheet for the Periodic Control learning guide.

Based on the criteria established for major implications for change (positive reaction below 70%) two major revisions were proposed. One pertained to the Perpetual Control learning guide and one to the Periodic Control learning guide.

The overall workshop was evaluated by the participants and 90 percent of the responses to the workshop presentation were positive. The American Fashion Association sponsored the workshop for the purposes of this study and have indicated an interest in supporting future

presentations of the revised Inventory Control and Merchandise Analysis learning guides.

Conclusions

The findings of the study are supportive of several major conclusions drawn by the research team as a result of their involvement with the total workshop. Small apparel retailers have specialized problems and need educational assistance in order to improve their merchandizing techniques. Adult learners are responsive to individualized instruction and to small group activities; however, the content of learning materials must be applicable to the needs of specific groups.

Recommendations

The following recommendations were developed as a result of the study:

1. A follow-up study should be made of the 65 retailers who participated in the workshop and problems encountered in implementing the procedures in the learning guides should be identified for further research.

2. The learning guides prepared as a part of the study should be revised and retested in future workshops in various apparel markets.

3. Additional learning guides should be developed based on other topics of concern to small apparel retailers. The model used in this study could be used as a guide to formulating other merchandising procedures which would be applicable for small apparel retailers.

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APPENDIXES

APPENDIX A

REFERENCES USED IN FACTUAL INFORMATION

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APPENDIX B

CONSULTANTS, ADVISORY GROUPS AND INTERVIEW QUESTIONS

Description of the Apparel Retailer Consultants (ARC):

Four Stillwater and two Tulsa retailers who owned and operated one or more small apparel shops which had similar characteristics to the stores represented by the participants in the Pre-Market Workshop.

Purpose of the ARC:

A. Determine merchandising difficulties peculiar to apparel shops.
B. Suggest areas for improvements in store management and planning.
C. Recommend topics for discussion in materials.

Types of questions asked of the ARC:

A. Was the content necessary to merchandise management?
    1. What additional topics or ideas should be added?
    2. What topics of ideas should be deleted?
B. What problems are pertinent to merchandise management?
    1. What kinds of records and figures are needed?
    2. What kinds of plans did they make for seasonal buying?
C. Would the materials provided in these learning guides be helpful to new retailers?

Description of American Fashion Association (AFA)

This organization was established 14 years ago with the goal of stimulating and improving activities between retailers and salesmen. AFA is the official women's and children's apparel salesmen's organization, recognized by the Apparel Mart.

Purpose of the AFA:

AFA emphasizes the need for retailers to know how to obtain merchandise. The AFA publishes a Buyer's Guide five times a year, aids first-time exhibitors in becoming established in the Mart and co-sponsors many all-day seminars for the retailers.

Types of questions asked of the AFA:

A. Was the content of the learning guides pertinent to the needs of the small apparel retailer?
    1. Was the organization of the learning guides understandable?
    2. Are the topics and information included in the learning guides needed by the small apparel retailer?
B. Will the workshop presentation technique be acceptable to the small apparel retailers?
C. Do you have other suggested approaches to meeting the needs of merchandise management of the small apparel retailer?
D. Are there topics of information you would recommend to be presented for the small apparel retailer?

Description of the Apparel Retailers' Advisory Committee (ARAC):

Six retailers were selected as members of this committee representing the American Fashion Association. Five states are represented including Texas, Oklahoma, Arkansas, Louisiana and Mississippi.

Purpose of the ARAC:

A. Advise with the workshop leaders and the AFA board concerning the content of the materials to be presented in the May workshop.

B. Serve as a resource retailer during the workshop's small group sessions.

C. React to the workshop and make suggestions concerning future programs sponsored by AFA.

Types of questions asked of the ARAC:

A. Is the content and format appealing and informative to a small retailer?

B. Suggestions to aid the new retailer in establishing a new business.

C. React to the small group discussion questions and problems:

1. Give actual experiences in similar problems.
2. Make suggestions on how to make plans and stick with them no matter what salesmen may say to change the plan for the good of the new season.

Members of the ARAC:

Percy DeLoach Greenwood, Missouri	Mary Holt Little Rock, Arkansas	Kay Thorne Vernon, Texas

Morris Gershon
Stillwater, Oklahoma

W. B. Little
Oklahoma City, Oklahoma

Harold Wormser
New Iberia, Louisiana

Carl Freel
Nashville, Arkansas

Description of the Role Model Apparel Retailers (RMAR):

Five Oklahoma City retailers who own and operate four stores with similar characteristics to the stores represented by the participants in the Pre-Market Workshop.

Purpose of the RMAR:

A. Pre-test the learning guides:
    1. React to the information in the learning guides.
    2. React to the method of presentation of the materials.
B. Discuss problems which are most difficult for them as a small retailer:
    1. Developing plans and following through with them.
    2. Making the most of the time and dollars when it is market time.
    3. Understanding merchandising techniques and how they relate to their store.
    4. Knowing what records to keep for future reference and then knowing how to use them in developing seasonal plans.

Types of questions asked of the RMAR:

A. Is the format presented understandable?
    1. Do you think you can use the materials included in the learning guides in your store planning?
B. Are the topics pertinent to store management?
    1. Do you have further suggestions for topics to be included?
    2. Do you have some suggested solutions to present that might help others with similar type stores?

Interview Questions--Inventory or Unit Control Systems

1. What types of control systems do you find best for you? Computer, manual, visual, perpetual, periodic.

2. In what ways have you improved your control systems throughout the years?

3. What merchandise classifications do you use?

4. What data do you record for your control system?

5. Do you have a person designated to do perpetual inventory controls? What are the responsibilities and duties of that person?

6. If your inventory is periodical, how often do you do it? Does inventory control take place on different times for different classifications?

7. Do your classifications change with each season? If so, do these changes affect your record keeping system? In what way?

8. Do you have a "rule of thumb" (a set way) to order within various merchandise classifications? i.e., tops to dresses to bottoms?

9. Based on information gained from your control systems, how late in the season do you reorder a "hot" item?

10. How does your control system influence your seasonal planning?

11. Do you have basic stock in each merchandise classification?

12. When the look is new, how do you determine how deep you should order?

13. Do you have a particular method for determining depth on basic stock? i.e., hosiery, bras, panties, sweaters, slacks.

14. Additional comments.

APPENDIX C

COMMENTS FROM PARTICIPANTS OF PRE-MARKET RETAILERS' SEMINAR, DALLAS/APPAREL MART, AUGUST, 1978

Comments from Participants of Pre-Market Retailers' Seminar

Dallas/Apparel Mart, August, 1978

Selected comments related to Inventory Control and Merchandise Analysis:

1. More seminars on specific subject areas; OTB, Unit Control, How to Buy, Markdowns and Markups.
2. Would like more learning aids.
3. Need worksheets to do Problems!
4. Sessions for individual classifications.
5. Cash flow analysis, OTB, Merchandising, Record Keeping, Management Problems.
6. Good discussion, exchange of ideas and methods.
7. All day seminars on individual aspects and inventory control.
8. Inventory and control systems in depth.
9. Ways to communicate better with manufacturer in terms of shipping, dating and returns.
10. Prefer OTB and inventory control only.

APPENDIX D

LETTER AND REACTION SHEET SENT TO PARTICIPANTS IN PRE-MARKET RETAILERS' SEMINAR, AUGUST, 1978

Oklahoma State University
Division of Home Economics

Stillwater, Oklahoma 74074
Home Economics West
(405)624-5053

January 29, 1979

Dear August Seminar Participant:

We trust that you received the learning materials and certificate for participation in the Dallas Pre-Market Retailers Seminar, August 24, 1978. We hope the seminar and the materials have helped you to improve your merchandise management and control.

Based on the evaluations and comments from the seminar last August, we are planning a workshop to allow participants to learn how to develop inventory control systems and to project open-to-buy figures which will meet individual store needs. Worksheets and calculators will be provided. Participants may use typical store figures to complete the worksheets or may use their own figures if they are available.

Attached is an outline of the workshop to be held May 24, 1979. The workshop is designed to meet the needs of the owners/managers of small apparel shops. We thought you might be interested in attending and/or you may know of other apparel retailers who want to learn more about inventory control and open-to-buy.

We would appreciate your taking a few minutes to complete the attached reaction sheet. Please return this to address below. Thank you for your assistance. We look forward to hearing from you in the near future.

Sincerely,

/s/ Kathryn Greenwood

Dr. Kathryn Greenwood
Clothing, Textiles & Merchandising
#315 Home Ec West
Oklahoma State University
Stillwater, OK 74074

KMG/ch

Enclosures (2)

cc Bette Hamilton, AFA

REACTION SHEET

NAME: _____

STORE NAME: _____

LOCATION: _____
Address City State/Zip Code

1. I did receive the learning materials _____ certificate _____.
2. At this time, my reaction to the August 1978 Pre-Market Seminar is that it was (check one) very helpful____, somewhat helpful____, are not applicable to my needs____.
3. At this time, my reaction to the materials I received following the August 1978 Seminar have been (check one) very useful____, somewhat useful____, are not useful for my needs____.
4. In your inventory records do you presently use: (check those pertaining to your business) style cards____, vendor-performance records____, summary reports weekly____ monthly____ seasonly____, list other reports you use_____
5. Do you presently develop season merchandise plans prior to going to market? yes_____ no_____
6. Do you prepare Open-to-Buy by $ Budget _____ by Units_____.
7. Do you plan assortments by size_____ color_____ style_____.
8. List other kinds of plans you make prior to market_____

_____

9. My reactions to the outline for the Pre-Market Retailer's Workshop for May 24, 1979 are: (check one) would like to attend____, cannot attend but would like to____, not interested in attending _____.
10. I know someone else who might be interested in attending the May workshop.

NAME: _____

STORE NAME: _____

LOCATION: _____
Address City State/Zip Code

Return To: Dr. Kathryn Greenwood
Clothing, Textiles & Merchandising
Oklahoma State University
Stillwater, Oklahoma 74074

APPENDIX E

EVALUATION INSTRUMENTS FOR

THREE LEARNING GUIDES

PART I

EVALUATION OF PERPETUAL CONTROL

Complete evaluation form after finishing Worksheet I.

Please indicate your reactions to the following statements (circle the appropriate number)	Yes	No	Uncertain
1. I understood the information and example about using purchase order information on the price ticket (page 2)	3	2	1
2. I completed the price ticket correctly the first try (no red circles, p. 3)	3	2	1
3. I understood the information and example about recording merchandise received and sold (p. 4)	3	2	1
4. I answered the questions about the merchandise received and sold correctly the first try (no red circles, p. 5)	3	2	1
5. I understood the information and example about recording merchandise marked down and returned (p. 6)	3	2	1
6. I answered the questions about the merchandise marked down and returned correctly the first try (no red circles, p. 7)	3	2	1

7. The majority of the red circles were caused by (check one)
   ___a. instruction not clearly written
   ___b. didn't understand examples
   ___c. both of the above
   ___d. no red circles

WORKSHEET I - Purchase Orders (p. 18)

8. The transactions on the Purchase Order were: (check one)
   ___a. easy to understand ___c. waste of time
   ___b. too complicated ___d. helpful

9. I answered the questions about the transactions correctly the first try (no red circles)	3	2	1
10. I think the information will help me to initiate or improve the perpetual inventory system for my store	3	2	1

11. List additional comments or questions below concerning perpetual control

_____

_____

PART I

EVALUATION OF PERIODIC CONTROL

Complete the evaluation form after finishing Worksheet 2.

Please indicate your reactions to the following statements (circle the appropriate number)	Yes	No	Uncertain
1. I understood the information and example about the application of visual inventory control to some merchandise classification (p. 10)	3	2	1
2. I answered the question about visual stock control correctly the first try (no red circles, p. 11)	3	2	1
3. I understood the information and example about the periodic control method (physical count, p. 12)	3	2	1
4. I answered the question about periodic control (physical count) the first try (no red circles, p. 13)	3	2	1
5. I understood the information and example about the breakdown of the inventory into classification by percentage (p. 14)	3	2	1
6. I answered the questions about the breakdown of the total inventory into merchandise classifications correctly the first try (no red circles, p. 15)	3	2	1

7. The majority of the red circles were caused by (check one):
   ___a. instructions not clearly written
   ___b. didn't understand examples
   ___c. both of the above
   ___d. no red circles

WORKSHEET 2 - Merchandise Classification Checksheet (p. 17)

8. The Merchandise Classifications Checksheet was (check one):
   ___a. easy to understand ___c. waste of time
   ___b. too complicated ___d. helpful

9. I was able to estimate the merchandise classification by percentages for the inventory in my store	3	2	1
10. I was able to answer the questions on the instruction sheet about stock counts and perpetual inventory (p. 16)	3	2	1

Evaluation of Periodic Control, p. 2

	Yes	No	Uncertain
11. I think the information will help me to identify physical inventory systems which would be appropriate for certain merchandise classifications.	3	2	1

12. List additional comments or questions below concerning periodic control.

_____

_____

_____

Next: Small Discussion Group. See questions on the last page of your evaluation packet.

PART I

EVALUATION OF MERCHANDISE ANALYSIS

Complete the evaluation form after finishing Worksheet 3.

Please indicate your reactions to the following statement (circle the appropriate number)	Yes	No	Uncertain
1. I understood the information and example about analyzing stock shortages, slow sellers and runners from the information recorded on the purchase order (p. 19)	3	2	1
2. I answered the questions about stock shortages, slow sellers and runners correctly the first try (no red circles, p. 20)	3	2	1
3. The information and example would help me evaluate the performance of resources based on markdowns, returns and sales (p. 21)	3	2	1
4. I answered the questions about the Resource Performance Report correctly the first try (no red circles, p. 22)	3	2	1

5. The majority of the red circles were caused by (check one):
   ___a. instructions not clearly written
   ___b. didn't understand examples
   ___c. both of the above
   ___d. no red circles

WORKSHEET 3 - Resource Performance Report (p. 23)

6. The Resource Performance Report was (check one):
   ___a. easy to understand ___c. waste of time
   ___b. too complicated ___d. helpful

7. I think the information will help me to analyze the performance records of my resources.	3	2	1

8. List additional comments or questions below concerning Merchandise Analysis

_____

_____

_____

Next: Small Discussion Group. See questions on the last page of your evaluation packet

APPENDIX F

EVALUATION OF TOTAL WORKSHOP

EVALUATION OF TOTAL WORKSHOP

Complete Evaluation Form at the End of the Workshop.

Please indicate your reactions to the following statements (circle the appropriate number)	Strongly Agree	Agree	Tend to Disagree	Disagree	Strongly Disagree
1. My time was well spent	5	4	3	2	1
2. I will be able to use the concepts I learned	5	4	3	2	1
3. I was satisfied with the quality of the material presented	5	4	3	2	1
4. We spent enough time relating theory to practice	5	4	3	2	1
5. I had adequate opportunities to participate	5	4	3	2	1
6. The Workshop was stimulating	5	4	3	2	1
7. The Workshop objectives were met	5	4	3	2	1
8. The physical environment of the Workshop including arrangement of room, ability to hear, etc. was satisfactory	5	4	3	2	1

Please indicate your reactions to the format of the Workshop materials (circle appropriate number)

The following features were helpful:

9. The organization of materials by terminal objectives and performance objectives	5	4	3	2	1
10. The use of examples and mini problems to achieve each performance objective	5	4	3	2	1
11. The use of worksheets to complete each terminal objective	5	4	3	2	1
12. The opportunity to work mini-problems and complete worksheets individually	5	4	3	2	1
13. The availability of calculators for math problems	5	4	3	2	1
14. The opportunity to have discussion in small groups	5	4	3	2	1
15. The opportunity to evaluate the workshop materials	5	4	3	2	1

	Strongly Agree	Agree	Tend to Disagree	Disagree	Strongly Disagree
16. The availability of the forms in the appendix	5	4	3	2	1

Please indicate your reactions to the content of the Workshop materials (circle the appropriate number)

The following topics were helpful:

Part I - Morning Session

17. Perpetual inventory methods	5	4	3	2	1
18. Physical inventory methods	5	4	3	2	1
19. Merchandise classification percentages	5	4	3	2	1
20. Resource evaluation	5	4	3	2	1

Part II - Afternoon Session

21. Dollar Merchandise Plan	5	4	3	2	1
22. Open-to-buy plan	5	4	3	2	1
23. Market plan	5	4	3	2	1

24. What was your overall evaluation of the Workshop?

___Excellent ___Good ___Satisfactory ___Unsatisfactory

25. What did you like most and least about the Workshop?

Most - Morning Session	Least - Morning Session
_____	_____
_____	_____
_____	_____

Most - Afternoon Session	Least - Afternoon Session
_____	_____
_____	_____
_____	_____

26. What would you most like to see changed for future workshops?

	More	Satisfactory	Less
a. Time for large group sessions	3	2	1
b. Time for small discussion groups	3	2	1
c. Examples	3	2	1

	More	Satisfactory	Less
d. Mini problems	3	2	1
e. Worksheets	3	2	1

f. Other things I would change are: (list below)

_____

_____

_____

27. What topics would you like for future Workshops?

_____

_____

_____

Other Comments:

APPENDIX G

PRE-WORKSHOP SURVEY

PRE-WORKSHOP SURVEY

Name of Store: _____

Address: _____ Phone: _____

Name of Owner/Manager: _____

Name(s) of person(s) attending the seminar:

Name _____ Title: _____

Name _____ Title: _____

1. Store Location: Downtown _____
   Mall or Shopping Center _____
   Other (Please explain) _____

2. Approximate size of town or city in which the store is located:
   - Below 5,000 _____
   - 5,000-10,000 _____
   - 10,001-25,000 _____
   - 25,001-50,000 _____
   - 50,001-75,000 _____
   - 75,001-100,000 _____
   - Over 100,000 _____

4. Merchandise carried (check one or more):

   Major classifications
   - coats _____
   - dresses _____
   - sportswear _____
   - lingerie _____
   - Other (please list) _____

   Accessories (please list)
   _____
   _____

   Size ranges
   - Junior _____
   - Misses _____
   - Women's _____
   - Other (please list) _____

   Price lines
   - Budget _____
   - Moderate _____
   - Better _____
   - Other (please list) _____

5. Approximate time store has been in operation:
   - Less than 1 year _____
   - 1-2 years _____
   - 3-4 years _____
   - 5-10 years _____
   - 11 or more _____

6. Approximate size of the store in terms of annual sales volume:
   - $100,000 or less _____
   - $100,001-$300,000 _____
   - $300,001-$500,000 _____
   - $500,001-or more _____

7. Approximate square footage of selling space (please list): _____

   _____

8. Number of employees (please list): full time_____ part time_____ (excluding owner)

9. Have you attended any retail seminars or received any formal training in merchandising since high school? Yes_____ No_____
If yes, please briefly explain: _____

_____

_____

10. Following is a list of topics to be discussed at the May 24th workshop. Please list one or more questions that you have about each of the following:

Topics	Your Questions
a. Maintaining inventory records	
b. Analyzing unit sales and stock	
c. Evaluating vendor performance	
d. Preparing seasonal merchandise plans	
e. Establishing markup and markdown policies	
f. Developing buying plans	

Other questions or comments:

Return to: Dr. Kathryn M. Greenwood, Coordinator
Fashion Merchandising Program, CTM Department
Oklahoma State University
Stillwater, Oklahoma 74074

APPENDIX H

SUMMARY OF CRITERIA, AND PROCEDURES USED TO FORMULATE SUGGESTED CHANGES

Summary of Criteria and Procedures used to Formulate Suggested Changes

Criteria used to determine the suggestions for the major changes included:

A. Redesign format.

B. Reorganize and/or expand content.

C. Clarify or expand example or mini-problem in relation to performance objectives.

D. Improve instructions and format worksheet in relation to terminal objective.

Criteria used to determine the suggestions for minor changes included:

A. Deletion of words.

B. Add words to clarify the statements.

C. Explain the formulas.

D. Simplify the computations.

E. Revise to conform for continuity purposes.

Procedures for formulating suggested changes:

A. Review the evaluation statement.

B. Review the related sections of each learning guide (LG).

C. Draw implications for each LG.

D. Formulate specific suggestions for major and minor revisions.

APPENDIX I

LETTER AND PROPOSED REVISIONS SENT TO APPAREL RETAILERS ADVISORY COMMITTEE

Oklahoma State University
Division of Home Economics

137 Home Economics West
Stillwater, OK 74074
(405) 624-6571

American Fashion
Association, Incorporated

59352 Apparel Mart
2300 Stemmons
Dallas, TX 75027
(214) 631-0821

June 29, 1979

Mr. David Wormser
WORMSER'S STORE
112 East Main
New Iberia, LA 70560

Dear Mr. Wormser:

We have analyzed the reactions of the participants to the inventory control and merchandise analysis materials presented in the morning session of the Retailers' workshop May 24, 1979. A list of proposed revisions in the materials has been prepared. We have indicated the specific change and the page numbers so that it will be relatively easy for you to decide whether or not you agree with the proposed revisions. Also enclosed are the revised pages which have major changes.

Laura plans to call you the week of July 9th to discuss the proposed revision and obtain your reactions. Please feel free to make suggestions and to raise questions about the specific changes when we call.

Your help in improving the workshop materials is greatly appreciated.

Sincerely,

/s/

Kathryn Greenwood

Laura Kendrick

gh

Enclosure

INVENTORY CONTROL AND MERCHANDISE ANALYSIS
LIST OF PROPOSED REVISIONS IN MATERIALS FOR MORNING SESSION (PINK)

The following changes have been developed based on the reactions of the participants in the Retailers' Workshop, May 24, 1979, Dallas Apparel Mart.

Check your reactions in the appropriate column.	AGREE	UNCERTAIN	DISAGREE	COMMENTS
1. Merchandise Information Section (p. 2) Explain in more detail how one section of the perforated price ticket can be used in inventory control.				
2. Example (p. 2) a. Explain the optional use of an assigned code for each resource on the price ticket. b. Explain use of keystone concept for retail price and optional use of cost on price ticket. c. Explain use of code for date on price ticket.				
3. Mini-Problem (p. 3) a. Move the price ticket to lower right hand section of page. b. Draw a line to indicate appropriate location of each item of information on the price ticket.				
4. Example (p. 4) Add column for description between price and classification columns.				
5. Mini-Problem (p. 5) Restate information using list format for code and separate instructions (see Exhibit A).				
6. Example (p. 6) a. Change symbol for returned to manufacturer to RM instead of RD (returned defective). b. Restate information using list format for code and separate instructions (as in Exhibit A).				
7. Mini-Problem (p. 7) a. Restate information using list format for code and separate instructions (as in Exhibit A). b. Add question asking how many items were sold at mark down. c. Change symbol for RD to RM. d. Add instructions at the bottom of page asking participants to transfer information on style #255 from mini-problem to worksheet.				

	AGREE	UNCERTAIN	DISAGREE	COMMENTS
8. Worksheet (p. 8) a. Add instructions for marking transactions in red pencil as indicated in code. b. Add questions asking how many items were sold at mark down.				
9. Example (p. 10) Expand to include more merchandising possibilities for visual control.				
10. Example (p. 14) Rewrite describing three different types of stores and give percentage of merchandise classifications in a comparative table (see Exhibit B).				
11. Mini-Problem (p. 15) a. Revise merchandise classifications to correspond with worksheet (see Exhibit C). b. Instruct participants to transfer percentage totals for major classifications to designated column on worksheet (see Exhibit C).				
12. Worksheet (p. 17) a. Eliminate questions on p. 16. b. Revise Merchandise Classification columns to Transferred Totals for Spring, Projected Totals for Fall and Calculated Increase (+) or Decrease (-) (see Exhibit D). c. Instruct participants to calculate increase or decrease in appropriate column (see Exhibit D).				
13. Example (p. 19) Correct tense to be consistent.				
14. Example (p. 21) a. Explain formula for calculating percentage. b. Correct percentage column to show formula for each answer.				
15. Worksheet (p. 23) Change tally to equal 25 on Victoria's merchandise analysis.				

Note additional ideas for discussion during telephone conference the week of July 9:

PROPOSED REVISION ONE
PERPETUAL CONTROL LEARNING GUIDE

Mini-Problem

The purpose order below shows that six skirts were ordered in style #255.

Instructions: Mark the transactions for style #255 as indicated in the following code and answer the questions.

√-Check in red the style received (#255).
O-Circle sizes received in each style (3,5,7,9,11).
/-Slash across each size sold at full retail price (9).
/-Slash in red across each size sold at mark down (7).
R-Use a red R to indicate merchandise returned by the customer and placed back in stock (3).
RM-Use a red RM to indicate merchandise returned to manufacturer (11).

Style	Price	Descr.	Class.	Qty.	Color	3	5	7	9	11	13
255	12.00	skirt	S	6	red	1	1	1	1	1	1

1. How many items were ordered? _____
2. How many items were received? _____
3. How many items were sold at full retail price? _____
4. How many items were sold at markdown? _____
5. What size(s) is left in stock? _____
6. How many items of merchandise were returned to stock? _____
7. How many items of merchandise were returned to manufacturer? _____

After you have checked your answers please transfer the transactions for style #255 to the appropriate line on page 8 (Worksheet #1).

PROPOSED REVISION TWO
PERIODIC LEARNING GUIDE

Example

Three small apparel merchants specialize in different types of merchandise. The Modern Shop has a major emphasis on missy fashions and the Campus Shop focuses strictly on junior merchandise. A junior and missy emphasis is used at the Elite Shop. Each merchandise classification is listed below.

Classifications	Modern Shop		Campus Shop		Elite Shop	
	Sub	Major	Sub	Major	Sub	Major
Dresses		12%		10%		10%
Coats/Jackets		-		-		3%
Sweaters		3%		5%		4%
Blouses		10%		15%		8%
Sportswear		71%		63%		64%
Coordinated Groups .	50%		25%		40%	
Separates	21%		38%		24%	
Pants						
Tops						
Jackets						
Blouses						
Skirts						
Jeans						
Lingerie		-		-		3%
Accessories		3%		5%		6%
Gifts		1%		1%		1%
Furs		-		-		-
Swimwear		-		1%		1%
TOTAL		100%		100%		100%

PROPOSED REVISION THREE
PERIODIC LEARNING GUIDE

Mini-Problem

The breakdown of the total inventory of the Village Specialty Shop is given according to the merchandise classifications listed below. From this information given, you should be able to find the total percentage of inventory in the Separates and Accessory Classifications.

Instructions: Calculate the total percentage for Separates. Next, add the totals of the merchandise classifications and subtract from 100% to determine the Accessory Classification.

Village Specialty Shop	
	%
Dresses	10%
Sweaters	2%
Blouses:	
8% Basic	
7% Fashion	
Other	
Sportswear:	
25% Coordinated Groups	25%
Separates:	%
11% Tops	
9% Pants	
2% Vests	
5% Jackets	
3% Skirts	
Other	
Jeans	10%
Lingerie	1%
Accessories	%
Gifts	1%
Furs	
Swimwear	1%
Total	100%

After you have checked your answers please transfer them to the Transferred Totals for Spring column on page 17.

PROPOSED REVISION FOUR
PERIODIC LEARNING GUIDE

REVISED WORKSHEET #2
MERCHANDISE CLASSIFICATION CHECKSHEET
Fall Projection

Classification	Approximate % Inventory		Calculated
	Transferred Totals Spring	Projected Totals Fall	Increase or Decrease
Dresses:	____%	12%	____%
Suits:	-	-	-
Coats/Jackets:	-	3%	____%
Sweaters:	____%	5%	____%
Blouses:	____%	5%	____%
___Basic			
___Fashion			
___Other			
Sportswear:			
___Coordinated	____%	35%	____%
Groups			
___Separates	____%	21%	____%
___Tops			
___Pants			
___Vests			
___Jackets			
___Skirts			
___Other			
Pantsuits:	-	-	-
Jeans:	____%	5%	____%
Lingerie/Loungewear:	____%	3%	____%
___Robes			
___Sleepwear			
___Slips			
___Hosiery			
___Other			
Accessories:	____%	7%	____%
___Purses			
___Scarves			
___Jewelry			
___Cosmetics			
___Other			
Gifts:	____%	3%	____%
Furs:	-	1%	____%
Swimwear:	____%	-	____%
Other:			
___			
___			
TOTAL	100%	100%	

Instructions: Calculate percentage of increase (+) or decrease (-) for each major classification in appropriate column.

APPENDIX J

EXAMPLE OF THE CONTENT AND FORMAT OF THE LEARNING GUIDE

PERPETUAL CONTROL

Performance Objective 1: You will be able to complete a price ticket given the information from the purchase order.

Merchandise Information

Certain facts are important for the merchant to record in order to plan and manage the continued growth of business. There are principal sources of information which can be used in setting up procedures for collecting data for a perpetual control system. Each store must determine the best type of system based on the nature of merchandise handled.

The purchase order is one of the sources of pertinent information which should be recorded on the price ticket. Kinds of information usually found on a purchase order include: date of order, resource's name and address, number and description of each style, cost price, quantities of each style ordered, sizes ordered, colors ordered, completion date and signature of buyer.

From the purchase order the merchant is able to record on the price ticket pertinent information for later use in recording sales. A perforated price ticket should be used to enable the retailer to collect the necessary information for a perpetual control system.

Example

The owner of the Vogue Fashion Store used the following purchase order to complete the price ticket for size 7, style #560.

201-645-0731
Order No. J R Dresses Inc. 1101 N. Robinson Los Angeles, Calif. 91064

May 24 1979

Sold to Vogue Fashions (#102)

Address 225 Elm

City Boston State Mass. ZIP Code 06322

When Ship 6-15-79 Ship Via cheapest

Terms: 8/10 eom F.O.B. Factory complete 5-1-79 Salesman Mark Jones

STYLE NO.	COLORS	QUAN.	DESCRIPTION	3	5	7	9	11	13	15	8	10	12	14	16	18	20	PRICE
406	Blk.	6	dress-V neck	1	1	1	1	1	1									24 —
326	Brown	6	2 pc. suit	1	1	1	1	1	1									32 —
560	Blue	6	dress-cord.	1	1	1	1	1	1									36 —

RECEIVED MAY 11

59 -102 400 Style 560 Size 7 Blue Price 72.00

59 -102 400 Style 560 Size 7 Blue Price 72.00

Mini-Problem

Given the following purchase order, complete the price ticket below according to the previous example, for a size 9 red skirt.

Order No.

RA-Designs

1560 Norwood L.A. Calif. 72503 213-642-0107 April 1 197 9

Sold to Vogue Fashions (#102)

Address 5000 Elm

City Houston State Texas ZIP Code 76201

When Ship As ready Ship Via cheapest

Terms: 8/10/EOM F.O.B. Factory Salesman Mark Jones

STYLE NO.	C/	COLORS	QUAN.	DESCRIPTION	3	5	7	9	11	13	15	8	10	12	14	16	18	20	PRICE
255	S	red	6	skirt	1	1	1	1	1	1									12 60

RECEIVED MAY 11 Okla.

Style	Size	Price
Style	Size	Price

Information on Price Ticket:

1. Date received
2. Resource assigned #
3. Style #
4. Size
5. Cost
6. Retail
7. Color

APPENDIX K

EXAMPLES OF THE WORKSHEETS FOR THE THREE LEARNING GUIDES

WORKSHEET I

PURCHASE ORDER

Sold to:

Village Inn Shop
2010 N. 2nd
Kansas City, Kansas

Date 4-9-79 Terms: 8/10/EOM
Completion Date 7-1-79
Shipping Instructions:
Ship via: Cheapest

DO NOT SHIP AGAINST THIS ORDER AFTER COMPLETION DATE!

Purchased from:

Casual Sportswear
1006 Main
Dallas, Texas 75207

Classification: Sportswear

Style	Price	Descr.	Class.	Qty.	Color	3	5	7	9	11	13
1402	12.00	robe	L	5	blue	1	(1)	(Ø)	(Ø)	1	
1255	12.00	skirt	S	6	red	R(1)	(1)	(Ø)	(Ø)	RD	1
1350	12.00	dress	D	6	red	(Ø)	(Ø)	(Ø)	(Ø)	(Ø)	(Ø)
1560	4.00	skirt	S	6	navy	R(1)	(Ø)	R(Ø)	(1)	(Ø)	(1)

Read the transactions that have taken place on the purchase order and then answer the following questions:

1. How many total items were ordered? ____
2. How many total items were received? ____
3. How many total items were sold at regular price? ____
4. What size(s) is left in stock? ____
5. How many items were returned to stock? ____
6. How many items were returned to manufacturer? ____

CODE:

style received - ✓
size received - O
size sold - /
return to manufacturer - RD
return by customer - R
markdown - /

WORKSHEET II

MERCHANDISE CLASSIFICATION CHECKSHEET

Classification	Approximate % Inventory					
	Now Have			Plan to Have		
	Missy	Junior	Total	Missy	Junior	Total
Dresses: ----------						
Suits: ----------						
Coats/Jackets: --------						
Sweaters: ----------						
Blouses: ----------						
___Basic						
___Fashion						
___Other						
Sportswear: ----------						
___Coordinated Groups						
Separates						
___Tops						
___Pants						
___Vests						
___Jackets						
___Skirts						
___Other						
Pantsuits: ----------						
Jeans: ----------						
Lingerie/Loungewear:---						
___Robes						
___Sleepwear						
___Slips						
___Hosiery						
___Other						
Accessories:----------						
___Purses						
___Scarves						
___Jewelry						
___Cosmetics						
___Other						
Gifts: ----------						
Furs: ----------						
Swimwear: ----------						
Other: ----------						
___						
___						
___						

WORKSHEET III

RESOURCE PERFORMANCE REPORT

Given the four resource unit summaries, rank the four resources as far as overall performance 1 - 2 - 3 - 4, with 1 having the highest rank.

Rank	Classification		%	Comments
	Resource			
	Total Received			
	Total Returned			
	Total Sold			
	(at full retail)			
	Total Marked Down			
	Total Left on Hand			
Rank	Classification	Dresses		Good delivery!
	Resource	Imperial		
	Total Received	25	100%	Co-op advertising
	Total Returned	2	8%	
	Total Sold	19	76%	Fast reorders
	(at full retail)			
	Total Marked Down	3	12%	
	Total Left on Hand	1	4%	
Rank	Classification	Dresses		Markdowns due to poor fit
	Resource	Stagelight		
	Total Received	18	72%	Prompt delivery
	Total Returned	0	0%	
	Total Sold	9	36%	Good terms
	(at full retail)			
	Total Marked Down	9	36%	
	Total Left on Hand	0	0	
Rank	Classification	Dresses		Large returns due to
	Resource	Victoria's		fabric problems
	Total Received	25	100%	
	Total Returned	6	24%	
	Total Sold	17	68%	factor problems
	(at full retail)			
	Total Marked Down	0	0%	
	Total Left on Hand	1	4%	

APPENDIX L

COMPUTERIZED EVALUATION DATA FOR THREE LEARNING GUIDES

COMPUTERIZED EVALUATION DATA FOR PERPETUAL CONTROL

Objective	V	N	μ	Frequency				Percentage		
				Yes	No	Unc.	NR	Yes	No	Unc.
P.O. 1	1	35	3.00	65	0	0	1	100.00	0.00	0.00
	2	55	2.56	43	12	0	1	78.10	21.80	0.00
P.O. 2	3	55	2.98	54	0	0	0	98.10	1.80	0.00
	4	55	2.56	43	12	0	1	78.10	21.80	0.00
P.O. 3	5	55	2.81	49	4	2	1	89.00	7.20	3.60
	6	51	2.37	35	16	0	5	68.60	31.30	0.00
				5	4	3	2 . NR	5	4	3	2
	7	38	2.81	5	13	5	15 18 0	13	34	13	39
					1	0	NR	1		0	*
	8a. easy	54	1.70		46	8	2	85		14	
	b. compl.	54	0.00		0	54	2	0		0	
	c. waste	54	0.00		0	43	2	0		0	
	d. help	54	0.55		15	39	2	27.7		72	
				Yes	No	Unc.	NR	Yes	No	Unc.
T.O.	9	51	2.41	36	15	0	5	70.50	29.40	0.00
	10	55	2.85	48	1	6	1	87.20	1.80	10.90

V = question number on evaluation form.

μ = mean scores for frequency calculated: yes=3; uncertain=2; no=1.

*1=checked answer; 0=did not check answer; NR=did not respond.

COMPUTERIZED EVALUATION DATA FOR PERIODIC CONTROL

Objective	V	N	μ	Frequency Yes	Frequency No	Frequency Unc.	Frequency NR	Percentage Yes	Percentage No	Percentage Unc.
P.O. 1	1	52	2.96	50	0	2	4	96.10	0.00	3.80
	2	52	2.67	43	8	1	4	82.60	15.30	1.90
P.O. 2	3	51	2.96	50	1	0	5	98.00	1.96	0.00
	4	50	2.76	43	5	2	6	86.00	10.00	4.00
P.O. 3	5	48	2.79	40	2	6	8	83.30	4.16	12.50
	6	45	2.75	39	5	1	11	86.60	11.10	2.20
				5	4	3	2 . NR	5	4	3	2
	7	35	2.02	0	10	3	22 21 0	0	28.5	8.5	62.8
					1	0	NR	1		0	*
	8a. easy	47	1.44		34	13	9	72.3		27.6	
	b. compl.	47	0.00		0	47	9	0.0		100.0	
	c. waste	47	1.27		3	44	9	6.3		93.6	
	d. help	47	0.68		16	31	9	34.0		65.9	
				Yes	No	Unc.	NR	Yes		No	Unc.
T.O.	9	45	2.00	16	16	13	11	35.00		35.00	28.80
	10	43	2.58	33	8	2	13	76.70		18.60	4.60
	11	44	2.88	39	0	5	12	88.60		0.00	11.30

V = question number on evaluation form.

μ = mean scores for frequency calculated: yes=3; uncertain=2; no=1.

* 1=checked answer; 0=did not check answer; NR=did not respond.

COMPUTERIZED EVALUATION DATA FOR MERCHANDISE ANALYSIS

Objective	V	N	μ	Frequency				Percentage		
				Yes	No	Unc.	NR	Yes	No	Unc.
P.O. 1	1	48	3.00	48	0	0	8	100.00	0.00	0.00
	2	47	2.87	44	3	0	9	93.60	6.30	0.00
P.O. 2	3	46	2.95	45	1	0	10	97.80	0.00	2.17
	4	45	2.95	44	1	0	11	97.70	2.20	0.00
				5	4	3	2 NR	5	4	3 2
	5	29	1.31	0	3	0	26 27	0.0	10.3	0.0 89.0
					1	0	NR	1	0	*
	6a. easy	43	1.20		26	17	13	60.40	39.50	
	b. compl.	43	.05		1	42	13	2.32	97.60	
	c. waste	43	.05		1	42	13	2.32	97.60	
	d. help	42	.93		41	1	14	46.50	53.40	
				Yes	No	Unc.	NR	Yes	No	Unc.
T.O.	7	42	2.97	41	0	1	14	97.60	0.00	2.30

V = question number on evaluation form.

μ = mean scores for frequency calculated: yes=3; uncertain=2; no=1.

*1=checked answer; 0=did not check answer; NR=did not respond.

APPENDIX M

COMMENTS AND REACTIONS FROM THE PARTICIPANTS FOR EACH LEARNING GUIDE

Comments and Reactions From Participants

Related to Each Learning Guide

Comments and reactions:

1. Perpetual Control

- What to do about merchandise that is never found - stolen.
- I used order date instead of received date.
- Stolen merchandise.
- Time concerned in keeping up these records.
- Already using a similar system.
- Although we have a detailed unit control system, the perpetual control will help to keep an accurate open-to-buy from on hand, on order and cancelled.
- Same vendor for two resources in example.
- Cost and retail not reflected on purchase order.
- Carelessness.

2. Periodic Control

- I did not consider layaway in number two.
- I am specified to dresses only in my store thus I would have to use a breakdown such as suits, two piece, one piece, long, short evening, etc.
- Need help in how to determine what percentage should go in different classifications.

3. Merchandise Analysis

- How much time is needed to keep records such as these.
- Forgot R meant in stock.
- Did not have time to think.
- Mistake on style number 76 on number two.
- Figures on last example on page 23 do not tally 25 units received, only 24 accounted for.
- The percentages were based on total ordered - not on total received. That does not reflect a true picture.

APPENDIX N

EVALUATION OF TOTAL WORKSHOP PRESENTATION

BY THE PARTICIPANTS

EVALUATION OF THE TOTAL WORKSHOP PRESENTATION BY THE WORKSHOP PARTICIPANTS (N=56)

			Frequency						Percentages				
V	N	μ	5	4	3	2	1	NR	5	4	3	2	1
								General Reactions [a]					
1	53	4.56	34	17		2		3	64.15	32.07		3.77	
2	53	4.47	27	24	2			3	50.94	45.28	3.77		
3	53	4.41	28	22	1	1	1	3	52.88	41.50	1.88	1.88	1.00
4	53	3.96	14	27	8	4		3	26.41	50.94	15.09	7.54	
5	53	4.35	23		2	1		3	43.39		3.77	1.88	
6	53	4.37		23	2	1		3		43.39	3.77	1.88	
7	51	4.37	23	25	2	1		5	45.09	49.02	3.92	1.96	
8	53	3.96	17	24	7	3	2	3	32.07	45.28	13.20	5.66	3.00
								Materials and Format [a]					
9	52	4.55	31	19	2			4	59.61	39.53	3.84		
10	53	4.49	34	14	3	1	1	3	64.15	26.41	5.66	1.88	1.80
11	51	4.58	35	13	1	2		5	68.62	25.49	1.96	3.92	
12	52	4.57	36	12	2	2		4	69.23	23.07	3.86	3.86	
13	53	4.73	39	14				3	73.58	26.41			
14	51	4.74	39	11	1			5	76.47	21.56	1.96		
15	50	4.46	29	17	3		1	6	58.00	34.00	6.00		2.00
16	52	4.67	38	11	3			4	73.07	21.15	5.76		
								Topics [a]					
17	53	4.45	30	19	3		1	3	56.60	35.84	5.66		1.00
18	53	4.43	29	20	3		1	3	54.71	37.73	5.66		1.80
19	52	4.40	27	21	3		1	4	51.92	40.38	5.76		1.00
20	53	4.43	30	19	1	3		3	56.60	35.84	1.88	5.66	
21	53	4.45	31	17	3	2		3	58.49	32.07	5.66	3.77	
22	53	4.62	37	14		2		3	69.81	26.41		3.77	
23	53	4.62	37	14		2		3	69.81	26.41		3.77	
24	51	4.50	33	13	3	2		5	64.70	25.49	5.88	3.92	
								Changes for Future Workshops [b]					
25	40	2.02			5	31	4	16			12.50	77.50	10.00
26	48	2.60			30	17	1	8			62.50	35.40	2.08
27	42	2.26			12	29	1	14			28.57	69.04	2.38
28	44	2.27			15	26	3	12			34.09	59.09	6.81
29	41	2.36			16	24	1	15			39.02	58.53	2.43

V = question number on evaluation form (Appendix F).

μ = mean scores for frequency calculated.

NR = no response.

[a] 5=strongly agree; 4=agree; 3=tend to disagree; 2=disagree; 1=strongly disagree.

[b] 3=more; 2=satisfactory; 1=less.

APPENDIX O

PARTICIPANTS' SUGGESTIONS FOR TOPICS

FOR FUTURE WORKSHOPS

VITA

Laura Gay Kendrick

Candidate for the Degree of

Master of Science

Thesis: DEVELOPMENT AND EVALUATION OF INVENTORY CONTROL AND MERCHANDISE ANALYSIS LEARNING GUIDES FOR SMALL APPAREL SHOPS

Major Field: Clothing, Textiles and Merchandising

Biographical:

Personal Data: Born in Fort Worth, Texas, November 20, 1952, the daughter of Mr. and Mrs. Lowell O. Kendrick.

Education: Graduated from Paschal High School, Fort Worth, Texas in May, 1971; received the Bachelor of Science degree from Texas Tech University in May, 1975, with a major in Clothing, Textiles and Merchandising; completed the requirements for the Master of Science degree in Clothing, Textiles and Merchandising in May, 1980 at Oklahoma State University.

Professional Experience: Salesperson at Sears, Fort Worth, Texas, 1969-1971; salesperson at Dillards, Lubbock, Texas, 1973-1974; buyer trainee at Daubes, Ardmore, Oklahoma, 1975-1976; assistant manager at Village Den, Ardmore, Oklahoma, 1976; owned clothing shop for contemporary men and women, Sulphur, Oklahoma, 1976-1968; graduate research and teaching assistant, Oklahoma State University, Stillwater, Oklahoma, 1978-1979.

Participants' Suggestions for Topics

For Future Workshops

advertising and promotion, selling

shoplifting, hiring, training

delivery, vendors refusals, vendor problems, terms

shipping costs, factors credit, cancelling orders

operational expenses analysis

markup and markdowns in dollars and percentage, analyzing markdowns

multiple store operations, transfer of stock etc.

ways to increase sales volume

how to space buying, what to do with old stock

computor assistance in OTB and inventory control

how sales affect profits