DEVELOPMENT AND EVALUATION OF AN ADVERTISING AND

PROMOTIONAL LEARNING PACKAGE FOR TRAINING

POTENTIAL APPAREL SHOP ENTREPRENEURS

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CHAPTER I

INTRODUCTION

An increase in the establishment of small apparel shops continues
to be apparent in the United States. There are 1200 women's shops
established annually (Dun and Bradstreet, 1972-73). Various sources
have reported that smaller businesses can be lucrative. Small apparel
merchants can expect to share 95 percent of the total volume of annual
sales under $50,000 (Conference Board, 1972-73). The United States
Department of Commerce (1975) reported that men's and boys' shops were
expecting a nine percent increase in receipts for 1976. Yet, in spite
of the glowing optimism, studies done by Dun and Bradstreet (1970) con-
firmed that 10-20 percent of new businesses fail during their first
year of operation.

More specifically, the major portion of failure comes in the area
of entrepreneurship. Gellers (1975, p. 124) of the Men's Retail Asso-
ciation, states the major failure factor is "incompetence and lack of
experience." This trend seems to support, in part, the basic philos-
ophy of a number of practicing businesspeople and academicians who feel
entrepreneurs are "born, not made."

Kierulff (1974), however, states that entrepreneurship seminars
are given each year. College courses, also, are being designed for
entrepreneurship. In addition, the Small Business Administration (SBA)
has developed seminars for interested entrepreneurs throughout the

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country. But despite the present training programs, there is a need for more learning materials with regard to retailing. Meyer and Logan (1966) have noted the great need for research and development of retail instructional materials.

What factors contribute to retail store failure and how can they be solved? The Small Business Administration (1975, p. 33) surveyed the Arkansas, Louisiana, New Mexico, Oklahoma and Texas area to determine what factors contribute to failure. They reported and ranked 27 causes of business failure. One cause cited was poor "merchandising, promotion and advertising practices." The National Retail Merchants Association (NRMA) estimated the average store would go out of business if it did not advertise. This fact is based on the estimated losses of between 20-25 percent of their customers each year. These customers must be replaced. There are thousands of case histories that show store success to be tied up directly with consistent advertising and that sales volume goes up in direct proportion to the advertising frequency rate (Dickson, 1971).

The high failure rate of small apparel retailers suggests that there is a need to help the potential entrepreneur achieve success through educational development. Learning materials in this area can provide valuable information and thus facilitate the development of entrepreneurial competencies.

Statement of Purpose

The major purpose of this study is to develop and evaluate an Advertising and Promotional learning package to be used in training

potential small apparel entrepreneurs in an open entry-open exit set-
ting. The four objectives were formulated in relation to the research
project.

> Objective One: To identify concepts related to the Adver-
> tising and Promotional function that can contribute to the
> entrepreneurial competencies of small apparel shops.
>
> Objective Two: To develop a learning package related to
> the Advertising and Promotional function that can be eval-
> uated in an open entry-open exit pilot study program.
>
> Objective Three: To evaluate the Advertising and Promo-
> tional learning package during an open entry-open exit
> pilot study.
>
> Objective Four: To make recommendations for revision of
> the learning package related to the Advertising and Promo-
> tional function.

Limitations

1. The Advertising and Promotional learning package was tested
   in a selected open entry-open exit setting.

2. The trainees that were recruited for the pilot study were
   adults who were potential entrepreneurs.

3. The learning package was written for an eight-week pilot
   study period.

4. The learning package contained only advertising and promo-
   tional concepts related to entrepreneurial concepts.

Assumptions

1. The learning package will increase the trainees' development
   of advertising and promotional concepts related to entrepre-
   neurship.

2. The achievement of performance objectives in each module
   will enable the trainee to achieve the terminal objective
   of the learning package.

Definitions

Advertising - Any paid form of nonpersonal presentation and promotion of ideas, goods, or services by an identified sponsor (American Marketing Association).

Adult Trainee (AT) - Any person enrolled in the pilot study.

Apparel Shop Entrepreneurship - Refers to the larger research project entitled "Instructional Materials for Apparel Entrepreneurship of Apparel Shops and is funded by the U.S. Office of Education.

Competency-Based Education - An attitude or behavior, skill or understanding demonstrated by a participant at a specified performance level (AHEA, 1974, p. 4).

Entrepreneur - Extraordinary person who arranges and manages any enterprise, especially a new or untried business (Packard, et al., 1976, p. 327).

Evaluation - A process which assesses the effectiveness of the learning package.

Evaluation Instrument - A rating scale used by the adult trainee, role model merchant, panel of business experts and teacher-coordinator to assess the effectiveness of the learning package utilized in the pilot study.

Individualized Instruction - An educational strategy which allows the trainee to work independently toward achieved established objectives and to work in a self-instructional, self-evaluative, self-paced manner in the pilot study (Baker, 1970, p. 775).

Individual Store Plans (ISP) - A composite of the several Apply to Your Own Store Plans.

Learning Package (LP) - A self-instructional unit developed for learning one or more basic concepts; the Advertising and Promotional learning package included two modules, one set of ISP and pretest and a posttest.

Module - A set of learning activities designed to help the trainee acquire and develop concepts related to specific performance objectives. Each module included a set of instructional objectives, rationale, content, content check, Apply to Your Own Store Plans and glossary.

Open Entry-Open Exit - A concept that refers to procedures in educational programs that allow the learner to enter and/or exit a formal educational setting at times other than the beginning of the traditional school term (Paulsen and Berg, 1976, p. 3).

Panel of Business Experts (PBE) - Panel composed of experts in each of the four functional retailing areas of accounting and control, buying and merchandising, operations and management, advertising and promotions and expertise in other areas such as banking and business law.

Performance Objectives - Explicit statement to describe what the trainee will be able to do upon completion of content segments within each module.

Pilot Study Participants - The following individuals actively engaged in various aspects of the ASE research project: a) teacher-coordinator; b) adult trainee; c) role model merchants; d) panel of business experts.

Role Model Merchants (RMM) - Successful entrepreneurs of apparel stores of similar size and merchandising policies as the prospective operation planned by each of the trainees.

Sales Promotion - Refers to activities that stimulate sales through enriching or bringing together a company's advertising and personal selling efforts (Brown, 1975, p. 2).

Background of Study

The individualized learning materials used in the Adult Shop Entrepreneurship (ASE) program were developed for a research project funded by the United States Office of Education. The research project was entitled "Instructional Materials for Adult Entrepreneurship of Apparel Shops" and was carried out in three stages. First, five learning packages were developed. The content of the five learning packages included the kind of information small apparel merchants in Oklahoma considered to be essential for persons planning their own women's or men's shops. The information was focused on the entrepreneurial competencies related to the following four retail functions:

1. Accounting and Control

2. Buying and Merchandising

3. Operations and Management

4. Advertising and Promotions

The research team consisted of principle director, Dr. Kathryn M. Greenwood and two co-directors, Dr. Margaret Callsen and Dr. Dennis Mott. Four graduate students assisted in the development of materials. Each was responsible for one of the four retail functions. This researcher was responsible for the development of the Advertising and Promotional instructional materials.

Second, a school setting was selected for an eight-week open entry-open exit pilot study. South Oklahoma City Junior College cooperated with the ASE Research Project to provide that open entry-open exit setting for the pilot study, June 14-August 4.

Third, the instructional materials and the procedure for the open entry-open exit program were evaluated and revisions were made. The strategy for the development, use and evaluation of the instructional materials involved the advisement of each trainee by a role model apparel merchant and by a panel of business experts. During the funding period the instructional materials were evaluated by the participating teacher-coordinator, the adult trainees, and the role model merchants. In addition, the panel of business experts evaluated the effectiveness of the instructional materials as evidenced by the entrepreneurial competencies exhibited by the adult trainees.

Based on the evaluations of the project, the instructional materials were revised. Recommendations will be made for the continued use of the revised materials in open entry-open exit programs aimed to provide entrepreneurial competencies which would facilitate self-employment in apparel shops. An abstract research project proposal and a schedule of responsibilities are located in Appendix S.

CHAPTER II

REVIEW OF LITERATURE

Competency-Based Education

Richard V. Jones (1968, p. 179) stated that one of the first
requirements in writing "Learning Activity Packages" (LAP) is "to
explicate a scope of major concepts of 'learnable ideas' to be under-
stood by the learner, and then to sequence these concepts." Compe-
tency-based education has been defined as an attitude or behavior,
skill or understanding demonstrated by a participant at a specified
performance level (AHEA, 1974, p. 4). The emphasis is now on accomp-
lishment of objectives rather than just cognitive activities. Compe-
tency-based objectives are stipulated in advance; described in explicit,
observable terms; and made known to the student prior to any related
instruction. Competency-based objectives imply clearly what the stu-
dent is to become (Houston, 1975, p. 5).

Traditional subject matter designed curricula are being revamped
into competency-based education programs. These new programs allow
the student to accomplish goals that are more realistic to the society
in which they live. Curriculum specialist Taba (1962) echoes this
sentiment.

> Perhaps the most serious weakness of the traditional concept
> of subject organization is its assumption that a rigorous
> training in academic disciplines detached from social reality
> develops abilities and skills most needed in meeting the de-
> mands of life problems (p. 391).

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Competency-based education programs provide a setting to fill in the gap of real life learning activities.

Houston (1975) delineated three types of objectives used in competency-based education. They are as follows:

1) Cognitive - Where the participant is expected to demonstrate knowledge and intellectual abilities and skills.

2) Performance-Based Objectives - Participant is required to do something rather than simply know something. While contingent upon knowledge, performance-based objectives place the emphasis on an observable action.

3) Consequence-Based Objectives - Participant is required to bring about a change in others (p. 5).

Schrag (1976) suggested that each student's exit performance meet specified minimum criteria. She also indicated that competency-based teacher education is based upon identification of tasks performed on the job and those involved in consumer activities. Then teachers and employers agree upon minimum standards of performance for each task. Authors of the Kentucky Model of Competency-Based Curriculum (Bruce and Carpenter, 1977) went a step further by developing procedures to obtain vocational priority competencies. The major steps for their student-centered vocational programs included the following steps: 1) identify priority occupational area; 2) develop performance objectives; 3) conduct field reviews; 4) revise objectives and 5) prepare instructional materials. Once a priority area had been determined, an extensive search of the literature was conducted to identify existing curriculum materials. In addition, workers currently employed in that field were observed and interviewed and a preliminary list was compiled. This list was submitted to a larger population. Based on the analysis of data, high priority tasks were identified and

performance objectives were developed. This initial writing process was also reviewed by a specialist in the field.

Competency-based education lends itself to instructional modules which are a set of experiences intended to facilitate learner's demonstration of objectives (Houston, 1975). Houston named five basic ingredients that are included in all format types.

1) Prospectus - Includes a clear statements of the rationale for modules' objectives, outlines major assumptions on which the module is based, identifies relationship of this module to the program as a whole, outlines major activities and alternatives and stipulates prerequisites.

2) Objective - Each stated in clear, unambiguous terms which stipulate what the learner is to demonstrate upon successful completion of the module.

3) Preassessment - Two dimensions of preassessment are needed: a) measures extent to which learner already has mastered prerequisites to modules and b) tests potential competence on meeting objective of module.

4) Enabling activities - Specify instruction alternatives for attaining module completion. Every module includes at least two means of achieving objective.

5) Postassessment - Related to module objective, the completion of a module is a signal to successful demonstration of competence (pp. 73-74).

In conclusion, competency-based education has provided a more realistic approach to real life activities than subject matter organization. O'Hanlon (1974) pointed out that competency-based programs have accomplished an increase in curriculum integration. Instead of a series of discrete courses, competency-based programs have usually produced a high degree of relationship among learning activities provided the students.

Open Entry-Open Exit

Education of today has been designed around a locked-step system.
That means that all students started and ended with learning activities
at the same time. The lock-step system was difficult to adjust to a
group setting when some group members progressed more quickly than did
others. Programmed instruction (Weisgerber, 1972) with an emphasis
on incremental learning and demonstrated by step-by-step mastery toward
clearly defined goals introduced the performance objective approach.

A truly individualized instructional program fits the needs and
abilities of all students in the group by permitting the student to
progress at their own rate. Musgrave (1975) stated:

> We agree that the rate of achievement within an individual
> is not constant. A student's achievement rate will vary
> from subject to subject, even when the subjects are closely
> related, such as reading and spelling. A student should be
> expected to approach the numerous skills and concepts in a
> particular subject with varying rates of interest. He
> should be expected to work at varying rates of speed within
> any reasonable time period rather than conforming to the
> preconceived pattern designated as normal or average in
> popular thinking (p. 113).

One approach to individualized instruction has been the open
entry-open exit program. Dollar (1971) defines an open entry-open
exit as

> an approach to programming which provides the flexibility of
> frequent intake (normally weekly), student paced progress,
> and either exit at an employable level of specialized readi-
> ness, or the attainment of an occupational objective. It is
> based on individualized prescribed instruction which is con-
> sistent with student capabilities, attitudes and learning
> style (p. 1).

One critical feature of the curriculum pattern is multiple rather
than single and exit entry points. The student can be introduced to
the subject matter area at varying times within the school year (open

entry) and may leave the program when they have accomplished their established objective (open exit).

The concept of open entry-open exit has become more closely associated with competency-based instruction. At least, it implies that a competency-based instructional delivery system will be employed to accomplish the timing or calendar-related outcomes that open entry-open exit refers to.

If an open entry-open exit setting is desired in the education field, then learners would enter the formal learning process when they are ready to and when an opening is available to them. They would be assessed as to competencies already held and placed at an appropriate point in the learning process. They would proceed at their own pace using a wide variety of available learning paths and materials, and they would exit the process at variable times when they have attained the competencies desired, e.g., if an occupational program, students would exit after the competencies needed to perform at job entry were achieved.

<center>Individualized Instruction</center>

The basis for individualized instruction as stated by Dunn and Dunn (1975) was, "Individualized instruction is the one to one relationship between a student and what he learns" (p. 5). This educational design in contrast with the traditional lockstep system has reversed the educational activities of the student and teacher. Individualized instruction has increased the student's responsibility to learn and has made the teacher accountable to the pupil for what they

are to achieve. The teacher becomes the guide and assumes the learning facilitator function.

Individualized instruction concept is not new. More than thirty years ago R. W. Selvidge published a book entitled, <u>Individual Instruction Sheets</u>. Although terminology was different, individualized student instruction, in keeping with their needs and abilities, was included (Somers and Little, 1971).

Instruction became individualized when learning objectives, instructional materials, learning and evaluation procedures were based on students' learning rate differences (Business Education Forum, 1974). The student's skills, abilities, interests, goals and learning styles must be analyzed before the implementation of individualized instruction provided flexible time arrangements within which learners might meet the course objectives.

Kapher (1969) stated the following assumptions which underlie individualized instruction design: 1) Instructional pace, 2) Level of difficulty, 3) Material relevance as perceived by the student, 4) Pupil's interest level and 5) Individual learning style of the pupil (p. 260).

Dunn and Dunn (1975) listed five alternative methods for individualizing instruction as:

1) Programmed learning - Materials were skills and related objectives are prearranged and sequenced in short groupings.

2) Instructional Packages - Variety of materials related to a specific concept which are packaged.

3) Contracts - Self-contained outline of a student's study.

4) Work experience - Where a student's environment is advanced into the community.

5) Community contributions - Similar to work study but
   requires nonrenumerative giving of time to community
   agencies (pp. 24-34).

Essentially, individualizing instruction requires the teacher
to encourage interests, allowing for individual styles and
respond to individual needs (NEA Journal, 1966, p. 21).

Instructional Packages

Kapfer's (1960, p. 260) assumption underlying individualizing
instruction indicates that "before truly individualized instruction
can become a reality, learning packages are needed which will provide
for self-paced rather than group-paced instruction."

Dunn and Dunn (1975) described a learning package as a variety of
materials related to a specific concept. Learning packages are self-
contained units of study designed to aid student mastery of a partic-
ular concept that had been stated in simplified behavioral objectives.

Arena (1970) listed five means for learning package utilization:

1) As an independent study program involving only a portion
   of the school population.

2) As an alternate means for instruction to be used periodi-
   cally in conjunction with the conventional system.

3) As a mechanism for encouraging and implementing programs
   of study in a subject area not contained within the exist-
   ing curriculum.

4) To provide remedial activities for students experiencing
   difficulty either in the subject area or with prerequisites
   necessary to success in the subject area (p. 786).

Because the primary function of the learning package is to guide
the student through an instructional materials program, each package
should contain a standardized format. The format design used by Nova
High School in Brownard County, Florida (called LAP) contained these
parts.

1) Rationale

2) Performance Objectives

3) Pretest

4) Pretest Analysis

5) Basic References

6) Program for Learning

7) Self-Evaluation

8) Self-Evaluation Test Analysis (Arena, 1970, p. 785).

A more recent format evaluation system (PAS) recommended:

1) Rationale

2) Learner's Objectives

3) Preassessment

4) Learning Activities

5) Posttest

6) Postassessment Evaluation

7) Student Feedback (Hecht, et al., 1975, p. 27).

Even though sequencing in the learning package models may vary, they each contain these essential parts:

Rationale: A short unit introduction which explains content importance to the learner.

Instructional Objectives: These indicate what the learner will be able to do when evaluated, the conditions under which the learner will perform and the quality performance standards expected.

Pre-Evaluation: The assessment of the extent to which the student has already achieved the objectives.

Content: Multidimensional learning materials of varying difficulty offered along with diversified learning activities to teach the concept of the objective.

<u>Self-Evaluation</u>: Activities which occur throughout the package and are used to indicate post-evaluation readiness.

<u>Post-Evaluation</u>: Proof of original objective achievement.

Adult Learning Theories

A recent survey of curriculum development literature for adult educational programs has led Fitzgerald (1975) to conclude that there are three critical factors for writing instructional materials; 1) relevance, 2) readability and 3) interest. Adult learning characteristics can be reviewed in terms of these three factors.

Relevance

Knowles (1967) reported that adults can be aided in diagnosing their own learning needs. A good program was one which created opportunities for individuals' self-discovery and for what they needed most to learn. During an adult's youth, subject matter curriculum was the extent of their experience. As adults, however, these experiences were never imposed on learners to the exclusion of their own concerns. Because of past experiences adults tend to learn in response to current life problems. Knowles (p. 278) explained: "They regard learning as a process of improving their ability to deal with problems they face now. They tend to enter educational activity in a 'problem-centered' frame of mind." The implication is that a course should stress what an adult should expect to achieve instead of stressing what the course is about. Knowles further indicated that the first course activities would be a diagnostic exercise through which the participants would identify their specific problems.

Readability

Any instructional materials designed for adults must be written
for the best comprehension possible. Siegel (1974) presented guide-
lines for writing effective learning materials (Appendix A).

Specific terms and vocabulary laid down by Bloom's Taxonomy (1964)
gave a verbal description of the behaviors to be elicited from the
adult learner. In all instances these terms will be understood that
the objective is to describe the student behavior to be attained (Ap-
pendix B).

Interest

Smith (1970) stated that since adult learners seek immediate re-
wards and usefulness from any facts, concepts or skills, the factor
of interest appeal should be of critical importance. A study done by
Fitzgerald (1975) on comprehension and interest factors showed that
the interest influence factor on performance appeared most clearly
with material closest to the subjects' reading level.

Another factor to consider in adult motivation is goal setting.
Carson (1975) indicated that when organizing instructional content for
adult learners, a plan must be executed. The activity specified in
the plan's method is carried out to produce that plan's goal. From
this, he explained, it follows the definition that human behavior is
goal-directed. Related back to relevance Carson (p. 23) reported:
"Whatever specific plans may be defined in the instructional content,
the student will learn the information only if it provides a means for
achieving one of his own current goals."

Apparel Entrepreneurship

The business field has always viewed entrepreneurs as those who undertake to carry out any legal enterprise. It has been commonly assumed that entrepreneurs must be willing and able to forego leisure, to work nights or weekends in the business, to manage effectively both major and menial tasks, to live with uncertainty, to be persistent and to think with confidence, yet they must be willing and able to change direction for the sake of the business (Robinson, 1974).

Even though standards of entrepreneurs are high, many clothes-loving individuals flirt with the notion of opening a small apaprel shop because they are beguiled by flattering friends for their fashion flair. Such amateurs rarely succeed. Bank of America's materials, the Small Business Reporter (1976) states that a retail entrepreneur is

a very special person with a genuinely unique merchandising concept. Profitable operation of an apparel shop is a complex and arduous task demanding business acumen and a strong retailing background (p. 2).

The article goes on to report that most successful apparel merchants begin their retail careers as salespeople, but that "aspiring retailers should also obtain some formal schooling in business and merchandising" (p. 2). One area of coursework recommended was advertising.

Review of Related Research

Several studies have been completed which are related to business education and curriculum format. Luchsinger (1968) reported in an analysis of retail education the extent to which retailing courses are offered in the school of business. Other areas of concern were to

determine what courses are taught in schools that offer retailing pro-
grams and to discover significant trends in retailing education in the
future. Luchsinger used two methods to collect the data needed. One
was by a questionnaire that would be analyzed by region in a computer
program. The second method was an investigation of the literature con-
cerning the history and composition of retailing programs in collegi-
ate curriculum. The findings and conclusions significantly reflect
the current trends in the development of curriculum. One conclusion
made was that a study of curriculum should be alert to both the needs
of the business community and leadership role of the business school.
Findings indicated that most colleges offered one or more courses in
retailing and those courses were becoming managerially oriented. Luch-
singer concluded that the retail field is becoming more complex and
requires more preparation in terms of curriculum breadth, faculty up-
grading, increased quantitative and behavioral orientation and curric-
ulum integration. Future retailing education must be upgraded by em-
phasizing the scientific aspects of retailing. One of those aspects
identified for further study was "consumer behavior and promotion."

Other curriculum research has been done in company training pro-
grams as well as across campuses. Pressley (1966) studied various
company training programs and the role that programmed instruction
played in their curriculum. The collection of data was made by a
questionnaire from 104 different companies. Based on an analysis of
data, some of the major findings and conclusions were: 1) companies
of all sizes were using programmed instruction; however, they were
only utilized by less than half of their employees; 2) over 86 percent
of the companies had started using programmed materials since 1960;

3) company studies showed that programmed instruction exhibits advantages over conventional training techniques, primarily through evidence of greater retention by the learner, training time saved, and lower training costs; 4) about three-fourths of the companies were using programs they had purchased, previously prepared materials, from "off the shelf" sources. Over 56 percent of the companies had developed their own programs; 5) employee attitudes were very favorable toward the use of programmed instruction; and 6) ninety percent of employees indicated they felt programmed instruction showed great promise as a training device in industry.

Before materials can be developed, however, job objectives must be identified. Two different studies developed procedures to evaluate job objectives and implement them into the educational curriculum. The purpose of Keeton's study (1975) was to ascertain the extent of agreement between employers and teacher-coordinators regarding selected objectives of cooperative vocational education. The researcher developed a questionnaire which was mailed to employers and teacher-coordinators. The sample was asked to rate 28 items and the researcher ranked those items that were in agreement. Twenty-four items were found in agreement.

Greenwood's (1972) study focused on the identification of job tasks for retail buying functions at an entry level position. This research, done at Oklahoma State University, involved a job description analysis to ascertain buyers and assistant buyers' responsibilities and duties. The identified tasks were then formulated into specific objectives which were incorporated into the fashion merchandising

curriculum. Results of the job description analysis identified 22 selected performance goals related to entry level buying positions in the merchandising area of retailing.

CHAPTER III

DEVELOPMENT OF ADVERTISING AND PROMOTIONAL

LEARNING PACKAGE FOR TRAINING POTENTIAL

APPAREL SHOP ENTREPRENEURS

The major purpose of this study is to develop and evaluate an advertising and promotional learning package to be used for training potential small apparel shop entrepreneurs in an open entry-open exit setting. This was done in conjunction with the Apparel Shop Entrepreneurship Project (ASE) described in the introduction. The four objectives related to the Advertising and Promotional function for this study were organized in two phases for the purpose of this study.

PHASE I

> Objective One: To identify concepts related to the Advertising and Promotional function that can contribute to the entrepreneurial competencies of small apparel shops.

> Objective Two: To develop a learning package related to the Advertising and Promotional function that can be evaluated in an open entry-open exit pilot study program.

PHASE II

> Objective Three: To evaluate the Advertising and Promotional learning package during an open entry-open exit pilot study.

> Objective Four: To make recommendations for revision of the learning package related to the Advertising and Promotional function.

This chapter deals with the discussion of procedures and findings for Phase I. An outline of procedures established by the ASE Research Team appears in Appendixes C and D. These procedures were used as a guide by the researcher in completing this study.

Procedures for Objective One

The first step in developing any occupationally specific instructional materials is to identify those entrepreneurial concepts related to that specific field. Because concepts for the advertising and promotion field cover a wide range of activities, the researcher found it necessary to identify only those concepts related to small apparel shops.

The procedures used to identify concepts that would contribute to advertising and promotional competencies were modified from the Kentucky's Model for Competency-Based Education discussed in the literature. The model listed the procedure of observing and interviewing workers currently employed in the field as a means of deriving competencies. On the basis of this procedure the ASE Research Team developed a questionnaire to requisite information from retailers currently engaged in small apparel shop entrepreneurship.

Deriving the Sample

In order to select a sample, the ASE Research Team established the following criteria. The sample was to be limited to small men's apparel shops, women's apparel shops and shops that carry both men's and women's apparel. Geographically, city sizes of small, medium and large sized cities were selected randomly in each quandrant of the

state. The city size was defined by the U.S. Census Bureau's stand-
ards and the quandrants were established by a geography specialist.
These cities were posted on a list. Shops then were identified by the
Dun and Bradstreet Oklahoma Trade Book (1970) and verified by the
"Yellow Pages" of each respective city. More detailed information on
selection and description of the sample appears in Appendix E.

Development of the Instrument

The questionnaire was formulated for the apparel retailers by the
ASE Research Team. The questions used represented concepts related to
entrepreneurial competencies for the retail functions of accounting
and control, buying and merchandising, operations and management and
advertising and promotions. The questionnaire items pertaining to the
advertising and promotional concepts were formulated by the researcher.
The following procedures were used to prepare the advertising and pro-
motions items listed on the questionnaire.

The researcher engaged in an extensive search of the literature
that related to the advertising and promotional function. The following
criteria was used for selecting the concepts in this area: 1) concepts
listed had to be applicable to small, single unit apparel shops; 2) con-
cepts had to apply to either men's or women's operations and 3) con-
cepts used must be applicable to opening a shop and/or its first year
of operation.

The researcher perused available entrepreneurial training program
materials along with writings by authorities in the advertising and
promotional field. Included in the materials were publications from
the Ohio State Advertising Manual, Small Business Administration, Bank

of America, University of Texas American Enterprise Series and Men's
Retail Association. A list of references used by the researcher ap-
pears in Appendix F. A tentative list of advertising and promotional
concepts were derived on the basis of this literature search and were
verified by two business experts in the field. The researcher inter-
viewed an advertising department manager and a local newspaper adver-
tising representative for reactions to the tentative concept list.
The list is presented in Appendix G.

Next, the tentative concepts were grouped under three general
headings related to opening a store: 1) advertising store opening;
2) promotional activities for store opening and 3) visual communications.

The format of the questionnaire developed by the ASE Research
Team was a checksheet on which the respondent was asked to rate the
advertising and promotions items in terms of importance in opening and
operating their particular store. Figure I shows the format for the
questionnaire and lists the advertising and promotions items included
in the questionnaire. The figure also displays the ratings by which
the respondents were to react. A copy of the entire questionnaire and
its components of cover letter, instructions and profile appear in
Appendix H.

Collection and Treatment of Data

The questionnaire was mailed to 216 apparel shop entrepreneurs
on November 19, 1976. Those who had not responded within a two week
time period were telephoned and asked to return the questionnaire.

Items	Ratings

ADVERTISING AND PROMOTION

Plan store opening in terms of:

Ratings columns: Very Important, Somewhat Important, Unimportant, Not Applicable

--Store Name. . . . .
--Logo. . . . .
--Letterhead Stationery . . . .
--Exterior Sign . . . .
--Packaging . . . .
--Advertising Style . . . .
--Direct Mail (Postcards, Handbills). . . . . . .
--Giveaways (Matches, Pens/Pencils,
      Balloons) . . . .
--Media . . . .
--Other (Specify)_____

Plan promotional activities for opening the
  store:

--Newspaper Ads . . . .
--Handbills . . . .
--Radio Spots . . . .
--Window and Interior Displays. . . . .
--Fashion Shows . . . .
--Special Events. . . . .
--Other (Specify)_____

Select visual communications in terms of:

--Printing Techniques . . . .
--Ad Layouts. . . . .
--Copy. . . . .
--Art Work. . . . .
--Other (Specify)_____

Figure 1. Advertising and Promotions Items and Format of Questionnaire

The telephone responses were of the following nature:

1. Out of Business
2. No Answer
3. Refused to Cooperate

4. Promised to Mail
5. Remailed Questionnaire
6. Wrong Number

Establishing Priority Concepts

The treatment of the data from the questionnaire was by a hand tabulation of responses. The ASE Research Team arbitrarily set the criterion for selecting the concepts to be used for the purposes of the project. The concepts rated very important by two-thirds of the respondents were considered priority concepts.

In order to validate those concepts that two-thirds of the questionnaire respondents rated as important, they were submitted to a group of business experts. These experts consisted of merchants and business experts in some aspect of entrepreneurship, including specialists in advertising and promotions. They were interviewed by a member of the research team and asked to respond to the preliminary list of concepts in terms of entrepreneurial competencies needed for opening an apparel shop. Following the interview, the priority list of advertising and promotional concepts were grouped into statements according to similarities. These priority concepts were designated for use in developing the objectives for the instructional materials.

Procedures for Objective Two

As stated in the literature, learning packages are an effective means of individualizing instruction. Kapher (1969) indicated that learning packages must be implemented before instruction is truly individualized. Therefore, the materials were packaged in the learning

package format established by the ASE Research Team. Objective Two deals with the procedures for the development of the Advertising and Promotional learning package. The learning package would be developed for use in an open entry-open exit pilot study program. A step-by-step outline of the learning package development procedures established by the ASE Research Team is located in Appendix C.

Development of Format of Learning Package

A learning package format was developed for the ASE Project based on the Package Assessment Scale (PAS) reviewed in the literature. The PAS is located in Appendix I. The Advertising and Promotional learning package was organized into two modules based on the concepts identified in Objective One. The two modules were sequenced to include the following basic components.

1. Instructions

2. Terminal Objective of the Learning Package and Performance Objectives of the Module

3. Rationale

4. Content

5. Content Check (including Self Evaluation)

6. Apply to Your Own Store Plans

7. Glossary

The learning package was designed based on individualized, competency-based concepts reviewed in the literature. A curriculum specialist from Oklahoma State Department of Vocational and Technical Education Board was consulted for ideas on stating objectives for the materials. The suggestions to establish a terminal objective for the

entire learning package and two or more performance objectives for each of the modules were adopted by the research team.

The instructions for each module included a list of the parts of the module and a brief description as to the procedures for using the module. The instructions also emphasized the fact that the modules were self-instructional, self-paced and self-evaluative. A rationale evolved from the content and explained the nature and importance of the module in order to give support for the achievement of the objectives. The performance objectives were established for the two modules based on the concepts identified in Objective One. The researcher wrote the content for each module in accordance with the stated performance objectives. Information sheets were compiled related to the advertising and promotional concepts. Examples were built into the content section to enable the trainee to achieve the performance objectives.

The content check was derived from information presented in the content sections for each performance objective. At least one question was written to represent each area of content. In order to be self-evaluative, a self check to indicate the answers to each question was printed on the back of the page.

The Apply to Your Own Store Plans section served as the learning activity that helped the trainee apply the information learned in the content. This component focused in on the trainee's tentative plans for entrepreneurship. The Apply to Your Own Store Plans section was developed for each performance objective in the two modules. A more detailed description of the Advertising and Promotional learning package format is presented in Appendix J.

Two other characteristics of the learning package included the pre/posttest and the Individual Store Plans. The pre/posttest was derived from the content check section using only those questions that were on the knowledge level of the cognitive domain. All questions listed on the tests were written objectively and both tests had identical questions.

The Individual Store Plans (ISP) represented a composite of all the Apply to Your Own Store Plans in the learning package. The ISP served as a format from which the trainees could present their own store plans to a prospective partner, a bank or financial representative.

Procedures for Writing the Modules

The researcher formulated specific observable behaviors to be exhibited by the adult learner following the establishment of the priority concepts based on interviews with business experts. Table I reports the transition from priority advertising and promotional concepts submitted to business experts to those behaviors that would be developed into performance objectives for the module.

The performance objective behaviors were implemented for writing performance objectives for the two modules. In accordance with competency-based authorities reviewed in the literature, a list of behavioral items were compiled to aid in the writing of the objectives. These are found in Appendix B.

The performance objectives for each module were written first. This type of objective named specific tasks a learner had to accomplish in order to complete the module.

TABLE I

PERFORMANCE OBJECTIVE BEHAVIORS RELATED
TO PRIORITY CONCEPTS FOR THE MODULES

Module	Priority Concepts	Performance Objective Behaviors
1	Plan store opening in terms of: Store Name[a] Logo[a] Exterior Sign[a] Media	Selection of media for opening of store Calculation of percentage of budget designated to each media
2	Plan promotional activities for opening the store: Newspaper Ads	Selection of media for opening of store
	Radio Spots Window and Interior Display	Selection of promotional activities for opening of store
	Select visual communication in terms of: Ad Layouts	Selection of media for opening of store
	Copy	

[a]These concepts were developed in detail in another learning package designed by the ASE Research Team.

Based on all the performance objectives developed, a terminal objective was formulated. This objective not only established the learning goal of the entire learning package, but like the performance objectives, it had stated conditions of achievement.

Additional criteria utilized in developing the learning package included: writing the instructional materials on a sixth grade reading level and eliminating sexual biases in the content and illustrations. Guidelines for readability level are located in Appendix A.

An aid to the development of the advertising and promotional learning package was a field test conducted by the ASE Research Team. The participants included a 15-member senior Clothing, Textiles and Merchandising class, who read the first module on budgeting. Changes in the modules were based on their reactions to: 1) time for completion, 2) comprehension of reading matter, 3) attainability of objectives, 4) acceptability of format and 5) knowledge of content. Their reactions were recorded on a checksheet, along with comments made during oral discussions with the research team.

Based on the students' reactions, the researcher made the following types of changes in the module: 1) examples for mathematical problems, 2) restructuring of poorly stated sentences and 3) more detail for certain concepts within the content. The suggestions were incorporated in revisions for the first module and were considered in writing the second module.

A second field test included two adults, one male and one female, with similar interests and background as trainees who would participate in the pilot study. The two adults were asked to complete both modules and react to the same criteria used by the class. In addition to commenting, they were asked to make suggestions regarding the program procedures. On the basis of their comments and suggestions a glossary of advertising and promotional terms and formulas was added. The

Advertising and Promotional learning package was also expanded to include a promotional section in one of the modules.

The revised learning package was completed by a May 15 deadline so they could be duplicated and used as the instructional materials in the ASE pilot study.

Analysis of Findings of Objective One

The purpose of Objective One was to identify and clarify some advertising and promotional concepts for use in developing instructional materials. This was achieved by tabulating the responses of a questionnaire mailed to retail apparel entrepreneurs. Of the 216 questionnaires sent, a total of 64 (30 percent) questionnaires were returned and used for tabulation.

Sample Analysis

The characteristics of the respondents derived from the questionnaire are presented in Table II. Seventy-eight percent of the respondents were owners of apparel shops, while the remaining respondents held positions as managers. Approximately half (48 percent) of the respondents were owners or managers of women's shops. Other shops included men's apparel (20 percent) and a combination of men's and women's (19 percent). One children's shop was represented in the sample. A note of interest was that the majority of the returned questionnaires were from medium-sized cities which had populations of from 2,500 to 25,000. The smallest return rate was recorded from the large cities (11%).

TABLE II

CHARACTERISTICS OF THE RESPONDENTS
N=64

Characteristics	Respondents[a]	
	N	%
1. Job Title		
Manager	14	22
Owner	50	78
2. Store Type		
Men's Apparel	20	31
Women's Apparel	31	48
Men's and Women's Apparel	12	19
Children's	1	2
3. Store Size		
Small ($100,000 or less)	13	20
Medium ($100,000-$500,000)	40	63
Large ($500,000 or more)	7	11
4. City Size		
Small (less than 2,500)	4	6
Medium (2,500-25,000)	27	42
Large (greater than 25,000)	33	52
5. Age Bracket		
Under 30	7	11
30-49	27	42
50 and over	30	47
6. Length of Store Operation		
1 year or less	3	5
2-4 years	9	14
5-10 years	11	17
10-20 years	13	20
20 or more years	28	44
7. Full Time Employees		
None	4	6
1-5	48	75
6-10	10	16
11-15	1	2
15-20	0	0
21-25	1	2

TABLE II (Continued)

	Characteristics	Respondents[a]	
		N	%
8.	Part-Time Employees		
	None	11	17
	1-5	48	75
	6-10	2	3
	11-15	1	2
	16-20	1	2

[a]All respondents did not respond to all of the items.

Examination of the tabulation of responses presented in Table III show that of the 20 concepts listed on the questionnaire, nine were rated very important. The respondents indicated that the use of media was an important consideration in their store openings. The newspaper was rated as very important by the greatest number (91%) of the merchants responding to the questionnaire. In store activities such as window and interior displays, store name, logo and exterior sign were reported as the greatest priority (over 45%) of the retailers. Respondents considered giveaways such as matches, pens, etc., the least important concept.

Six major concepts that were rated very important by two-thirds of the respondents and were submitted to three merchants and three members of the Service Core of Retired Executives (SCORE) by a research team member for verification. They concurred with the responses on the questionnaire, but emphasized that budgeting for advertising expenses

TABLE III

APPAREL MERCHANTS' RESPONSES TO ADVERTISING AND PROMOTIONAL
STATEMENTS FROM QUESTIONNAIRE
N=64

Advertising and Promotional Statements	Degree of Importance									
	Very Important		Somewhat Important		Unimportant		Not Applicable		No Response	
	N	%	N	%	N	%	N	%	N	%
Plan store opening in terms of:										
--Store Name[a]	52	81	9	14	0	0	0	0	3	5
--Logo[a]	29	45	25	39	2	3	1	2	7	11
--Letterhead Stationery	22	34	24	38	13	20	1	2	4	6
--Exterior Sign[a]	48	75	13	20	0	0	1	2	2	3
--Packaging	24	38	32	50	3	5	0	0	5	8
--Advertising Style	31	48	24	38	4	6	0	0	5	8
--Direct Mail (Postcards, Handbills)	23	36	24	38	5	8	3	5	9	14
--Giveaways (Matches, Pens/Pencils, Balloons)	9	14	19	30	25	39	6	9	5	8
--Media[a]	31	48	17	27	2	3	1	2	13	20
Plan promotional activities for opening the store:										
--Newspaper Ads[a]	58	91	3	5	0	0	0	0	1	2
--Handbills	10	16	31	48	11	17	6	9	6	9
--Radio Spots[a]	35	55	18	28	4	6	4	6	3	5
--Window and Interior Displays[a]	53	83	8	13	0	0	2	3	1	2
--Fashion Shows	18	28	30	47	11	17	2	3	3	5
--Special Events	15	23	31	48	3	5	5	8	10	16

TABLE III (Continued)

Advertising and Promotional Statements	Degree of Importance									
	Very Important		Somewhat Important		Unimportant		Not Applicable		No Response	
	N	%	N	%	N	%	N	%	N	%
Select visual communication in terms of:										
--Printing Techniques	21	33	32	50	3	5	2	3	6	9
--Ad Layouts	46	72	12	19	1	2	1	2	4	6
--Copy[a]	36	56	16	25	2	3	2	3	8	13
--Art Work	31	48	23	36	1	2	2	3	7	11

[a]Indicates those concepts two-thirds (43) of the respondents considered very important for opening their shop.

NOTE: All respondents did not answer each question.

was of primary importance in terms of opening a shop. Figure 2 reflects three major categories of concepts that were utilized in the instructional materials.

---

1. Planning the Budget
     Yearly
     Opening Month

2. Selection of Media
     Newspaper
     Radio
     Direct Mail
     Yellow Pages
     Supplementary Media

3. Selection of Activities
     Window Display
     Interior Display
     Promotional Activities

NOTE: Logo, store name and exterior sign were dealt with in another learning package developed by the ASE Research Team.

Figure 2. Advertising and Promotional Concepts Selected for Use in Learning Package

Learning Package Developed for Objective Two

The purpose of Objective Two was to develop the Advertising and Promotional concepts into a learning package. The following is a discussion of the components of the two Advertising and Promotional Modules

developed for use in the pilot study for the ASE Research Project. The objectives are presented in Table IV.

The terminal objective established the goal for the learning package: to develop an Advertising and Promotional Budget and select appropriate advertising media and promotional activities. Advertising and Promotional Budget, Module One, was organized to reflect the expenditures needed to advertise and promote a new apparel shop. This module was based on the concept of budgeting as was advised by business experts in Objective One. The second module, Selection of Media and Activities, guided the trainee to make promotional and media selections and helped them to decide what proportion of the Advertising and Promotional Budget media and activities would compromise. Each module was written in relation to the planning promotions concept reported in Objective One.

The performance objectives of the Advertising and Promotional Budget module named specific tasks of approximating a percentage of the gross annual sales that would be allocated to Advertising and Promotions and calculating the yearly dollar expenditures. Once the yearly figures were allocated, the trainee was instructed to select the month they planned to open and to designate dollars to that month. The performance objectives of the Selection of Media and Activities Module directed the trainee to select specific media and promotions for the store opening and calculate the dollars each media would cost. Other tasks allowed the trainee to consider various plans for the use of media and promotions.

TABLE IV

OBJECTIVES AND CONCEPTS USED IN LEARNING
PACKAGE AND MODULES

Instructional Material	Title	Objectives	Concepts
Learning Package	Advertising and Promotions	Terminal Objective: You will develop advertising and promotional budget plans and select appropriate advertising media and promotional activities.	Advertising and Promotions
Module One	Advertising and Promotional Budget	Performance Objectives: Given a range of percentages and your gross annual sales you will	Planning Budget
		1. Approximate a percentage of your gross annual sales for advertising and promotion.	
		2. Calculate the amount of money you will spend on advertising and promotion for the year.	Yearly Budget
		Given the average monthly percentage of sales volume you will	
		1. Select the month you plan to open.	
		2. Calculate the amount of money you will spend on your first month's advertising and promotion.	Opening Month Budget

TABLE IV (Continued)

Instructional Material	Title	Objectives	Concepts
Module Two	Selection of Media and Activities	Performance Objective: Given the advantages and limitations of newspaper, direct mail, radio, the Yellow Pages and the definitions of supplementary media you will 1. Select the specific media you will plan to use for your store's opening. 2. Approximate what proportion of the opening month's ad budget will be for the media you've selected. Given a formula you will calculate how much money you will spend on each media you have chosen for your store. Given the definition of various promotional activities you will consider which of the promotional activities you will use to open your store.	Selection of Media in Terms of: Newspaper Radio Direct Mail Yellow Pages Supplementary Media Selection of Activities in Terms of: Window Display Interior Display Promotional Activities

supported the use of advertising and promotions in small shop entrepreneurship, and in Module Two the advantages of planning media and promotional activities were emphasized.

Content of the Advertising and Promotional Budget module incorporated examples of advertising budget figures and things to consider while planning the allocation of those dollars. The second module presented the types of media and promotional activities and their advantages and limitations in the smaller business. Specific questions in the content check pertained to types of media, as well as checking for knowledge of the calculations presented in the content.

The Apply to Your Own Store Plans section in each module instructed the trainee to calculate ad budget figures and record specific activities they planned to use. The information worked out in the Apply to Your Own Store section was summarized and transferred to the Individual Store Plans (ISP). A copy of the two modules, pretest/posttest, and the ISP is in Appendix K.

In conclusion, the identification of concepts and the development of the learning packages represented the accomplished objectives for Phase I. A questionnaire isolated nine advertising and promotional concepts to be used in developing the objectives of the learning package. They were: 1) Store Name; 2) Logo; 3) Exterior Sign; 4) Media; 5) Newspaper Ads; 6) Radio Spots; 7) Window and Interior Displays; 8) Ad Layouts and 9) Copy. All concepts, except the first three which were used in a different learning package, were incorporated into five performance objectives of the learning package. The format of the learning package included seven distinct parts for the two modules: 1) Instructions; 2) Terminal Objective of the Learning Package and

Performance Objectives of the Module; 3) Rationale; 4) Content; 5) Content Check (including self evaluation); 6) Apply to Your Own Store Plans and 7) Glossary. A field test which included both a class and two adult entrepreneurs worked the modules to help with changes. On completion of the field test, the changes were made in the Advertising and Promotional Budget Module and Selection of Media and Activities Module for the pilot study concluded Phase II of the study.

CHAPTER IV

EVALUATION OF ADVERTISING AND PROMOTIONAL

LEARNING PACKAGE FOR TRAINING POTENTIAL

APPAREL SHOP ENTREPRENEURS

The evaluation of the Advertising and Promotional Learning Package
was completed in conjunction with the Apparel Shop Entrepreneurship
(ASE) Research Project. Objectives three and four stated below relate
to complete Phase II. The procedures and findings for Phase II will
be presented in respect to these two objectives.

PHASE II

Objective Three: To evaluate the Advertising and
Promotional Learning Package by means of an open
entry-open exit pilot study.

Objective Four: To make recommendations for revi-
sion of the Advertising and Promotional Learning
Package.

Procedures for Evaluating the Advertising and

Promotional Learning Package

The evaluation data was collected during an eight-week pilot study
period. The selection of the sample, the selection of the instruments
and the collection and treatment of data are presented next.

Selection of Sample

To test the use of materials, a pilot study was conducted utilizing

an open entry-open exit setting. The ASE Research Team selected South
Oklahoma City Junior College as the school setting for the pilot study
on the basis of their provision of an open entry-open exit setting,
flexible pacing, recruitment of male and female adult trainees and
availability of merchants and other business experts to participate
in the pilot study. Arrangements were made for the recruitment of ten
or more adult trainees, twelve or more Role Model Merchants (RMM),
twelve or more Panel of Business Experts (PBE) members and a Teacher-
Coordinator to participate with the research team. Copies of the re-
cruitment brochure and publicity are in Appendix M.

Owners of small apparel shops were identified to serve as RMMs.
They served as consultants to the trainees for each of the retail func-
tions. The criteria for selecting each of the retailers who served as
RMMs specified that each must be a successful entrepreneur in an ap-
parel shop of a similar size and merchandising policies as the pros-
pective retail operation being planned by each of the adult trainees.
Both men and women were represented.

The PBEs were selected to serve as group evaluators after each
trainee had completed all the instructional materials and formulated
their Individual Store Plans (ISP). Each panel was comprised of four
or more of the following business areas: business law, banking and
retail management.

The research team utilized the aid of a teacher-coordinator who
had expertise in all four retail functions and was an employee of the
school. The teacher-coordinator's responsibilities were described by
the research team. The adult trainees were recruited between May 15-

June 15 and a list of their activities in the study appear in Appendix N.

Selection of Instruments

Evaluation instruments developed by the ASE research team were used to measure the effectiveness of the Advertising and Promotional learning package. Effectiveness of the learning package would be considered on the basis of two aspects.

1) Achievement of the Advertising and Promotional objectives by the trainee.

2) Contribution to and hindrance of trainee's learning by the characteristics of the learning package.

The following instruments were developed by the ASE Research Team:

1) Adult Trainee Module Evaluation

2) Adult Trainee Achievement of Performance Objectives and Terminal Objective

3) Adult Trainee Program Evaluation

4) Role Model Merchant Program Evaluation

5) Panel of Business Expert Evaluation of the Adult Trainee's Achievement of Performance Objectives and Terminal Objective

6) Panel of Business Expert Program Evaluation

7) Teacher-Coordinator Program Evaluation

In addition, the data gathering instruments included the trainee's exit conference records, teacher-coordinator record book and the research team log. The exit conference was scheduled for each adult trainee by the teacher-coordinator following the Panel of Business Expert presentation. This session was structured to give the adult trainee freedom to comment on any part of the program. The teacher-

coordinator recorded the adult trainee's progress and impressions of the program materials and procedures in a log. The research team also recorded program evaluations in a log. Each participant was asked to fill out a biographical profile to aid in the program evaluation.

The researcher selected three instruments to requisite evaluative information for the purpose of this study: 1) the Adult Trainee Module Evaluation reflected a rating of all the characteristics of each module (directions, content, content check, etc.) and was completed by the adult trainee for each of the Advertising and Promotional modules, 2) the Adult Trainee's Achievement of Performance Objectives and Terminal Objective instrument was completed by each trainee, and 3) The trainees were also rated by the Panel of Business Experts in the PBE Evaluation of Adult Trainee Achievement of Performance Objectives and Terminal Objective. This instrument was completed by the Panel of Business Experts following the presentation of the Individual Store Plans by the adult trainee. The researcher also used the Advertising and Promotional posttest to determine what entrepreneurial concepts were developed by the trainee. The posttest, along with the profiles and record books, was used by the researcher for evaluation purposes. A sample of the instruments, profiles, and posttest are in Appendixes O and P, respectively.

Collection of Data

The data was collected while the pilot study was in progress from June 14 to August 4. The research team monitored the study during on-site visits and recorded comments concerning the program, procedures and participants in the log book. The research team administered the

instruments to the various participants throughout the pilot study period. The adult trainee completed a profile before starting the program and the Module Evaluations were used while the trainee worked through the learning package. After the Panel of Business Expert presentation, the trainee completed the Program Evaluation and Achievement of Performance Objectives and Terminal Objective.

Both the PBE and RMM filled out a profile before the trainee conferences. After the conference the PBE and RMM were asked to respond to the Program evaluation instrument. The PBE were also asked to react to the Adult Trainee's Achievement of Performance Objectives and Terminal Objective instrument.

The teacher-coordinator and the research team collected data throughout the eight-week pilot study period. The research team numbered the items of the instruments and compiled the raw data after the pilot study was finished.

Treatment of Data

The data collected from the selected instruments was hand tabulated and analyzed by the researcher. The responses on the three instruments were recorded on coding sheets for each trainee. A sequential coding system was used to number each of the evaluation items before they were recorded on the coding sheets. The code and the criteria of the instrument ratings are shown in Table V.

The two rating scales were treated as a uniform code. The only item to deviate from this criteria was a negatively stated item on module length. For this item the numerical code was reversed to 5, 4, 3, 2, 1. The research team arbitrarily established a basis for

TABLE V

CRITERIA AND CODE FOR THE EVALUATION
INSTRUMENT RATING SCALES

Items	Code	Criteria
Rating Scale #1		
Excellent (E)	1	Needs no adjustment
Good (G)	2	Needs minor adjustment
Satisfactory (S)	3	Needs several improvements
Passable (P)	4	Needs reexamination; approval given with reservations
Non Applicable (NA)	5	Information not adequate to make adjustments
Rating Scale #2		
Strongly Agree (SA)	1	Agree completely with statement
Agree (A)	2	Agree somewhat with statement
Uncertain (U)	3	Neither agree or disagree with statement
Disagree (D)	4	Disagree somewhat with statement
Strongly Disagree (SD)	5	Disagree completely with statement

considering items for revision. Any item which scores 1 or 2 was not reviewed for revision. Items which scored 3, 4, and 5 were listed to be reviewed for possible suggestions for revisions.

Two aspects of the data were considered in terms of formulating specific suggestions based on reviewed evaluations. One aspect determined the effectiveness of the characteristics of the learning package that appeared to contribute to or hinder the learning of the adult

trainee. This data was derived from the Adult Trainee Module Evaluation Instrument. The characteristics of the module were listed as directions, rationale, performance objectives, content, content check, self check, Apply to Your Own Store Plans, Glossary, length and information. The criteria for listing those characteristics of the module that hindered learning were set as any characteristic receiving a 3, 4, or 5 rating. Those characteristics receiving a 1 and/or 2 response were considered contributions to the trainee's achievement and were not considered for revision. The hindering characteristics were placed on a list and were considered for revisions along with any negative comments noted on the instrument.

The second aspect was achievement of Advertising and Promotional learning package objectives by the trainee. This evaluation of achievement was reflected in two instruments which were the Adult Trainee Achievement of Performance Objectives and Terminal Objective and the PBE Evaluation of the Adult Trainee's Achievement of Performance Objectives and Terminal Objective. The second aspect used the same criteria to list items for specific suggestions for revision. Any concept that was rated 3, 4, or 5 was listed for possible revisions. The other instrument that reflected implications for trainee achievement of objectives was the Advertising and Promotional posttest. Since the posttest items were derived directly from the content checks (which were representative questions relating to the performance objectives), the posttest items were grouped by module for the performance objectives they represented. Any questions missed would merit examination of the performance objective it represented and would aid in drawing implications for revision.

Other implications for revisions included any negatively stated comments in the teacher-coordinator record book and log, research team log or written on the instruments reviewed by the researcher. These implications were noted by the researcher and listed for review in making specific suggestions for revisions.

Procedures for Making Recommendations for
Revising of the Learning Package

The fourth objective of the study was to recommend revisions for the learning package. In accordance with ASE project goals, the researcher adopted the procedures developed by the research team to make recommendations for revising the Advertising and Promotional learning package.

Collection of Data

Based on evaluation procedures, the researcher recorded all items that met the criteria for hindering learning of the adult trainee and for those objectives not considered as achieved by the adult trainees. For those items which represented the achievement of objectives, the researcher drew implications for revisions. These implications were taken to a Panel of Business Experts for their reactions by a personal interview. Based on their recorded responses, the researcher formulated suggestions for specific changes in the learning package. The procedures were constructed so that, if necessary, the Panel of Business Expert could be consulted more than once for reaction to specific changes before the final revisions were made.

Treatment of Data

As stated in the assumptions, every module characteristic contributed to or hindered the trainee from developing the Advertising and Promotional concepts embodied in the performance objectives. Therefore, any objective not considered to be achieved could be directly improved or developed by revision of any and all hindering characteristics of the learning package. So, in order to formulate revisions, the researcher listed all those objectives not achieved by the trainee. Directly under each objective were listed those module characteristics considered to be hindrances by the trainee. This was done by module.

The researcher treated the listed objectives by making and recording implications for revision. The implications used were from a list standardized by the ASE Research Team and reported in Appendix Q. They were then submitted to a Panel of Business Expert member who made comments and suggestions that related directly to modular characteristics listed below the objectives. Other implications for revisions came from the teacher-coordinator record book and log, research team log and incorrect posttest questions. Once each learning package characteristic had a specific revision formulated by the researcher, it could then be assumed that these revisions would increase the opportunity for achievement of the objectives by the trainee.

Evaluation Findings for Phase II

Description of Sample

The purpose of Objective Three was to gather evaluative information for the Advertising and Promotional learning package. This was

accomplished by reviewing the characteristics of the sample, evaluating the data of the instruments and analysis of the posttest scores.

Respondents to the instruments included 11 trainees, 12 Role Model Merchants, 16 Panel of Business Experts and the teacher-coordinator. A description of the sample was derived from the respective profiles of the participants and is summarized in Table VI. Detailed profile data is presented in Appendix R.

TABLE VI

CHARACTERISTICS OF PARTICIPANTS IN PILOT STUDY

Characteristics	Participants			
	AT N=11	RMM N=12	PBE N=16	T-C N=1
Sex				
Male	1	7	13	
Female	10	5	3	1
Educational Background				
High School	11	11	12	
Bachelors	2	6	6	1
Masters	2	0	1	
Advertising Coursework	0	2	5	1
Length of Business Position Held				
Less than 1 year	5	2	0	
1-2 years	2	1	0	
2-4 years	0	1	0	
5-10 years	0	4	2	1
11-20 years	0	1	3	
20 or more years	0	4	11	

AT-Adult Trainee, RMM-Role Model Merchant, PBE-Panel of Business Expert, T-C-Teacher-Coordinator.

NOTE: Some PBE and RMMs served more than once, making their totals 16 and 12, respectively.

All but one of the 11 trainees recruited were women. They had a wide range of retail experiences but the majority were in retail sales generally for less than a year. The teacher-coordinator had over five years of business experience, including coursework in advertising. The teacher-coordinator's educational background reflected college work resulting in a bachelor's degree. Education background showed eleven trainees received their high school diplomas while two went on to get a Bachelor of Science degree and two more received Master of Science degrees. The courses that were most commonly taken were economic in nature. Five trainees stated specific goals of opening women's shops while another trainee was considering a fabric shop and another a shoe gallery. Concerning what information they would like during the program, three requested opening shop information and three others mentioned wanting detailed information on buying and management.

Profile information from the role model merchants reported all twelve (one served twice, making a total of twelve) as being owners of small apparel shops. In respect to retail experience, eight RMMs indicated they had "much" experience in advertising and promotions and three reported having "some" experience. The length of store operation from less than one year to over twenty years reflected an equal distribution of owners. Retailers reported a range of coursework in the business field with two indicating coursework in advertising. Ten of the retail participants attended college and six received Bachelor of Science degrees.

Summarizations of the Panel of Business Experts profiles showed an equal distribution of members in the areas of management, banking and ownership of apparel shops. Three members served as retired

advisors for Service Core of Retired Executives (SCORE). Retail exper-
ience reported five PBE members had "much" experience in advertising
and three had "some." Only two had none. The majority of coursework
was done in economics with five completing studies in advertising. All
members had high school degrees with six going on to the Bachelor of
Science level.

Evaluation of Learning Package Characteristics

The effectiveness of the Advertising and Promotional learning
package was assessed on the Adult Trainee's Module Evaluation instru-
ment. The effectiveness is discussed in terms of the ten characteris-
tice reflected in the tabulations recorded in Table VII.

Characteristic Effectiveness of Module One. Eight of the ten
characteristics received ratings that were considered to be effective
contributors to learning by the trainee. Of these effective charac-
teristics the glossary reported seven "agree" responses and only one
"strongly agree" which constituted the lowest contribution to learning
by the characteristics. The highest rating was reflected in terms of
needing the information in the module. Five trainees "strongly agreed"
they needed the information provided while three more "agreed." An
equal distribution of "agree" and "strongly agree" responses was re-
corded for the remaining characteristics.

Those items reported as ineffective characteristics were self
check and module length. The self check was listed because of a need
to correct some typing errors indicated by the trainees. Concerning
module length, two trainees "agreed" that it was too short.

TABLE VII

DATA COMPILATION CHART FOR TRAINEE'S MODULE EVALUATION
N=8[a]

Characteristic	Statement	Module One Number of Responses					Module Two Number of Responses				
		SA	A	U	D	SD	SA	A	U	D	SD
Directions	1. The directions for the module were easy to understand.	4	4				4	4			
Rationale	2. The rationale for the module emphasized the importance of the content.	3	5				4	4			
Performance Objectives	3. The performance objectives were easily understood.	4	4				4	4			
	4. The performance objectives were attainable.	4	4				4	4			
Content	5. The content was easily understood.	3	5				4	5			
	6. The content was adequate.	2	6				3	4	1		
Content Checks	7. The content checks enabled me to apply the information to my store plans.	4	4				3	5			
Self Checks	8. The self checks were helpful.	4	3		1		4	2	1	1	

TABLE VII (Continued)

Characteristic	Statement	Module One Number of Responses					Module Two Number of Responses				
		SA	A	U	D	SD	SA	A	U	D	SD
Apply to Your Own Store Plans	9. The apply to your own store plans section helped me to make my own store plans.	4	4				4	2	1		
Glossary	10. The glossary was helpful.	1	7				1	7			
Length	11. The module was too short.		2	2	3	1		2	2	3	
Information	12. I felt that I needed the information in this module.	5	3				4	3	1		

SA-Strongly Agree U-Uncertain SD-Strongly Disagree
A-Agree D-Disagree

[a]All respondents did not respond to all of the items.

Characteristic Effectiveness of Module Two. Five of the 12 char-
acteristics received positive ratings by the trainees. These were
directions, rationale, performance objectives, content check and glos-
sary. Again, glossary was rated as the lowest contributor to learning
with the remaining characteristics maintaining an equal distribution
between "agree" and "strongly agree."

In regard to the ineffective characteristics, the self check was
again listed because of typographical errors in the answer that needed
correction. Content adequacy and the Apply to Your Own Store Plans
were reported as "uncertain." A trainee also indicated uncertainty as
to the necessity of the information of Module Two.

Evaluation of Adult Trainee Achievement
of Advertising and Promotional Objectives

As stated in the procedures, the performance objectives were the
embodiment of all the priority Advertising and Promotional concepts de-
veloped in Objective One. Therefore, the development of Advertising
and Promotional concepts were evaluated by reviewing the Adult Train-
ee's Achievement of the Performance Objectives and Terminal Objective
instruments. The rating of the performance objectives and the terminal
objective by the trainee and the PBE are reported in Table VIII.

The ratings of the trainees' achievement of the performance objec-
tives indicated that the adult trainees rated themselves much higher
than the PBE members. Three trainees reported making excellent deci-
sions on selecting media and allocating money, while five considered
their efforts "good." The majority of the PBEs, however, viewed the
trainees as only satisfactorily achieving selection and allocation of

TABLE VIII

EVALUATION OF OBJECTIVES FOR ADVERTISING
AND PROMOTIONAL LEARNING PACKAGE BY
ADULT TRAINEES AND PANEL OF
BUSINESS EXPERTS

Statement	Response									
	Adult Trainee N=8					PBE N=16[a]				
	E	G	S	P	NA	E	G	S	P	NA
1. Realistic advertising budget for the store	1	7				6	8	12	4	1
2. First month's advertising budget well planned	1	7				4	9	14	2	1
3. Appropriate selections of advertising media proposed for type of store	3	5				3	11	13	3	1
4. Realistic allocations made in advertising budget for each medium selected	3	5				1	8	14	5	3
Terminal Objective										
This trainee has developed a realistic advertising budget and selected appropriate advertising media for an apparel store	2	5				3	23	4	1	5

E-Excellent, G-Good, S-Satisfactory, P-Passable, NA-Not Applicable

NOTE: Each Panel of Business Expert rated four trainees, making the
total responses 32.

The ratings of the trainees' achievement of the performance objectives indicated that the adult trainees rated themselves much higher than the PBE members did. Three trainees reported making excellent

decisions on selecting media and allocating money, while five considered their efforts "good." The majority of the PBEs, however, viewed the trainees as only satisfactorily achieving selection and allocation of media. The poorest rating by the PBE was noted on the objective for allocating budget money for each medium. Five reported that the trainee's achievement in this area was "poor," whereas the trainee viewed their achievement of this objective most favorably.

Objectives dealing with budgeting for the opening year and month were also considered to have been achieved by the trainee, although less favorably than the other objectives. Seven adult trainees rated themselves "good" and only one rated himself as "excellent." The PBE viewed the budgeting objectives more favorably even though two and four, respectively rated the trainees as "poor" and "satisfactory." On the basis of the PBE reactions, all four objectives were listed for formulation of implications for revision.

The ratings of the terminal objective stating that the trainee had developed a realistic budget and selected appropriate advertising media for an apparel shop paralleled those of the performance objectives. Again, five adult trainees viewed their achievement of the terminal objective as "good" and two as "excellent." The PBE, however, rated the trainees less favorably. Interesting to note is that a majority of the PBEs reported the overall objective more favorably than they did the more specific performance objectives. Here 23 reported the achievement of budgeting and selection as being "good," three as "satisfactory" and only one as "poor." On the basis of the PBE reactions, the terminal objective was listed for revision.

Analysis of Posttest Scores

Six of the eight trainees who completed the program recorded perfect scores on their Advertising and Promotional posttests. Table IX reports the pre and posttest scores and categorizes the items by the concept they represented in each module. All trainees achieved over 80 percent. The three items that were missed on the posttest were considered in drawing implications for revision. All three questions missed were media selection in nature and indicate what content areas would need revisional improvement. The posttest administered to the adult trainee is presented in Appendix L.

The gain scores are reported by trainee in Table X. Of the trainees enrolled in the program, two did not complete the Advertising and Promotional learning package and two failed to complete the posttest. The greatest gain scores was by AT 1 who improved 60 percent. The smallest gain was by three trainees who improved by one question. Four of the seven trainees who completed the posttest made 100 percent.

A review of the evaluation data collected by the instruments, posttest scores and the comments of the adult trainees suggested that the Advertising and Promotional learning package was an effective means of developing Advertising and Promotional concepts. Those areas that did not contribute to learning or achievement are dealt with in Objective Four in terms of revision. Table XI is a list of those objectives and characteristics in each module that needed revision.

Revisional Findings for Phase II

Based on procedures presented in Objective Four, the researcher

TABLE IX

DATA COMPILATION CHART OF ADVERTISING AND
PROMOTION PRETEST/POSTTEST SCORES BY
CONCEPT AND ITEM
$N=8$[a]

	Concept	Item Number	Number of Correct Response	
			Pretest	Posttest
MODULE ONE	Ad Plan	1	3	8
	Budget	2	8	8
	Media	3	9	8
		4	9	8
		5	6	6
		6	8	7
		7	9	7
		8	9	7
MODULE TWO		9	7	7
		10	6	5
		11	6	6
	Activities	12	6	7
		13	6	7
		14	8	7
		15	8	7
		16	5	7

[a]All trainees did not complete both pretest and posttest.

TABLE X

DATA COMPILATION CHART FOR TRAINEE PRETEST/
POSTTEST SCORES (GAIN)

Trainee	Pretest Correct Responses		Posttest Correct Responses		Gain	
	N	%	N	%	N	%
AT-1	10	62.5	16	100.0	6	60.0
AT-2	13	81.3	14	87.5	1	8.0
AT-3	11	68.8	--	--	--	--
AT-4	14	87.5	--	--	--	--
AT-5	--	--	--	--	--	--
AT-6	14	87.5	15	93.8	1	7.0
AT-7	12	75.0	16	100.0	4	33.0
AT-8	15	93.7	16	100.0	1	6.0
AT-9	12	75.0	16	100.0	4	33.0
AT-10	12	75.0	14	84.5	2	16.0
AT-11	--	--	--	--	--	--

NOTE: Trainees 3, 5 and 11 did not complete the program.
Trainee 4 failed to complete the last page of the
posttest.

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TABLE XI

OBJECTIVES AND CHARACTERISTICS NEEDING REVISION
IN MODULES ONE AND TWO

	Objective Needing Revision	Characteristics Needing Revision
MODULE ONE	1. Realistic advertising budget for store	Module Length
	2. First month's ad budget well planned	Module Length
MODULE TWO	1. Appropriate selections of ad media proposed for type of store	Module Length Content Inadequate Apply to Your Own Store Plans Information Needed
	2. Realistic allocation made in Advertising and Promotional budget for each medium selected	Module Length Content Inadequate Apply to Your Own Store Plans Information Needed

made recommendations for revision for the Advertising and Promotional
learning package. The researcher drew implications for those objec-
tives not achieved by the trainees. The objectives were listed for
each module and the implication are discussed in relation to Table XII.

Implications for Budgeting Module

Both objectives representative of Advertising and Promotional
budgeting for the opening year and month were used to formulate impli-
cations. The implication made by the researcher for the lack of devel-
opment of a realistic advertising budget objective was to review the
budget figures and make sure they were correct. Panel of Business
Expert reactions to the researcher's implications were made in refer-
ence to those modular characteristics listed under the objective. Mod-
ule length was the only hindering characteristic reported for Module
One. The PBE suggested adding National Retailers and Merchants Associ-
ation (NRMA) figures month by month. Another suggestion was to give
hypothetical examples thereby adding to module length and improving
the trainee's opportunity to achieve the budgeting objective.

The lack of achievement of the first month's budget objective im-
plied more budgeting details be worked out for the store opening. PBE
reactions made in relation to module length were to plan out an adver-
tising and promotional package for the first six months of store oper-
ation and possibly doubling the budget figure for that period.

Implications for Selection of Media Module

According to data tabulation, the objectives for appropriating
selections of advertising media and the allocating funds for these

TABLE XII

SUMMARY OF RESEARCHER'S IMPLICATIONS AND PBE REACTIONS

	Performance Objectives to be Achieved by Improvement of Modular Characteristics	Researcher's Implications and Suggestions	PBE Reactions and Suggestions
MODULE ONE	1. Realistic Advertising Budget for Store	Budget figures reviewed and clarification	
	--Module too short		1. Add NRMA promotional figures month by month
			2. Give hypothetical examples of store budgets
	2. First Month's Advertising Budget well planned	More emphasis on opening by including more information	
	--Module too short		1. Plan out advertising and promotion package for first six months
			2. Double budget for first six months of opening
MODULE TWO	1. Appropriate Selections of Advertising Media Proposed for Type of Store	Clarify by adding more detailed information	
	--Module too short		1. Add hypothetical examples of proposed store types and media and activities they selected

TABLE XII (Continued)

Performance Objectives to be Achieved by Improvement of Modular Characteristics	Researcher's Implications and Suggestions	PBE Reactions and Suggestions
--Content inadequate		1. Add information on cost factors for selection
		2. Discuss effectiveness of types of media
--Apply to Your Own Store Plans Helped		4. Add hypothetical example of proposed store type and media and activities they selected
		5. Plan out advertising and promotional package for first six months
--Needed the information in this module		6. Give support in rationale to encourage experience
		7. Have trainee visit store
2. Realistic Allocation Made in Advertising Budget for Each Medium Selected	Clarify by adding information for selection budgeting	
--Module too short		1. Add examples on display
		2. Add NRMA budget selection figures
--Content inadequate		3. Give hypothetical budget in content

MODULE TWO (Continued)

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TABLE XII (Continued)

	Performance Objectives to be Achieved by Improvement of Modular Characteristics	Researcher's Implications and Suggestions	PBE Reactions and Suggestions
MODULE TWO (Con't.)	--Apply to Your Own Store Plans helped --Needed information in this module		4. Give trainee a problem to solve given a certain amount of advertising funds 5. Give support in rationale to encouraging budgeting
	Terminal Objective This trainee developed a realistic advertising budget and selected appropriate media for an apparel store	Terminal objective will be accomplished by the improvement of all the performance objectives	

selections was not achieved by the trainee. Lack of achievement of selection of advertising media implied clarifying the objective by adding additional information for enhancing selection activities. The PBE addressed each hindering module characteristic with a suggestion as to improve the objective. PBE suggestions included:

1) Adding hypothetical examples of proposed store types and the media and activities they would select. This would add to module length.

2) Adding information on cost factors for selection and have trainee work example problems. Another suggestion was giving hypothetical examples which would also add depth to module content.

3) Giving a hypothetical example of proposed store type and media and activities they would select was also suggested to insure aid from the Apply to Your Own Store Plans sections.

4) Giving more support in the rationale to encourage the trainee to gain experience in advertising by working. Another suggestion for the rationale was encouraging the trainee to visit a store and talk with some merchants.

The second unachieved objective was one concerning realistic allocations made in the advertising budget for each medium selected. The researcher surmised that this objective, too, would be improved by clarifying this area with additional information. Specific information to be included as suggested by the PBE was to add the NRMA budget selection figures. Another comment made by a trainee to add examples for display was agreed on by the PBE. To improve content and Apply to Your Own Store Plans section, suggestions were made in terms of giving a sample problem with detailed sums of money and asking the trainees to make plans for spending. An inadequate content would be enhanced by the suggestion of giving a hypothetical budget in the content.

Implications for Terminal Objective

As stated in the assumptions, the terminal objective concerning development of a realistic advertising budget and selection of advertising media for an apparel store will be accomplished by improving the performance objectives. Because the performance objectives led the trainee to the overall goal of making a budget and plans for their own store, the improvement of all the specific tasks would give the trainee a better opportunity to formulate a good budget and plans for advertising and promotions.

Recommendations for Revision

On completion of the development and evaluation of the learning package, the researcher formulated recommendations for revision. These recommendations would serve as part of the more specific revisions of the overall ASE Research Project evaluations. These recommendations were submitted to the ASE Research Team to review in terms of final revisions. Recommendations for the Advertising and Promotional learning package will be discussed by module in relation to the following list.

List of Recommendations

Module One

1. Add NRMA promotional figure month by month.

2. Plan out advertising and promotional package for first six months.

3. Double budget figures for the first six months.

4. Give a hypothetical budget example.

5. Build rationale to encourage budgeting.

Module Two

1. Add hypothetical examples of proposed store types and the media and activities they selected.

2. Add information on cost factors for selection.

3. Discuss effectiveness of the different types of media.

4. Allow the trainee to work problem examples of cost factors and selection.

5. Build rationale to encourage trainee to make in store visits and/or gain experience through working in the field.

6. Add examples on display.

Recommendations for Module One

The emphasis of Module One can be reinforced by adding claritive information on the budget. A hypothetical example of another shop showing their expenses for a six-month period would provide a more solid basis from which the trainee would make decisions for their own shop. Planning their own promotional package for the first six months would require a more extensive background in advertising. Here, the NRMA promotional figures month by month would provide more exposure to national trends in advertising and promotional areas. A problem would lie in the fact that these national figures deal with shops currently in operation, so the PBE suggestion to double the budget figures for the first six months could be utilized. A six-month budget formulation in Module One would only contain over-all figures, saving the detailed information on media and activities for Module Two.

Recommendations for Module Two

Recommendations for Module Two are more extensive than Module One. The type of recommendations are, again, claritive in nature.

In order to make more appropriate selections of advertising media and promotional activities more information could be developed to give the trainee a better background to make decisions for their own operations. This type of information can be efficiently presented through a hypothetical example. As suggested by the PBE, an example of a proposed store type can be made with an explanation of what kinds of media and activities they would choose and why. Here the PBE suggestion to add information on media cost factors can be utilized. These recommendations would improve on module length and content adequacy.

To build a better Apply to Your Own Store Plans section, the PBE idea to plan out a promotional package for the first six months can be implemented for this section. To aid in making selections, more support in terms of the hypothetical store and example of their selections could be developed for the content. Examples can be developed for men's and women's shops.

Because the trainees were uncertain whether they needed the information the module supplied, more support in the rationale could be written. This information would encourage trainees to get retail experience or visit a store similar to their own. This would emphasize the importance of selection of media and activities.

Additional information could be presented in the area of display and effectiveness of other media to aid in content adequacy. These,

too, could also be presented by hypothetical examples which was the most suggested technique of the PBE. Both men's and women's examples could be developed for this technique.

In conclusion, the major revisions involved clarification of content in both modules. The revisions were submitted to the ASE Research Team for final recommendations.

CHAPTER V

SUMMARY AND RECOMMENDATIONS

Learning packages have been effectively used as an educational format in order to achieve individualized instruction in various situations. They are exceptionally functional for students who need flexibility and freedom in education, as in the case of adult learners. For adults who are seeking careers in retail entrepreneurship, occupationally specific learning packages can be important vehicles to use in developing competencies for self-employment. The goal of the Apparel Shop Entrepreneurship Research Project was to provide instructional materials pertaining to the four retail functions of accounting/control, buying/merchandising, operations/management and advertising/promotions and, thus, to aid potential entrepreneurs in opening their own apparel shops.

Summary

The purpose of the study was to identify advertising and promotional concepts that would enhance small shop entrepreneurship and to develop self instructional materials in a learning package format. Once the learning package with two modules was developed for the Advertising and Promotional function, it was pilot tested in an open entry-open exit setting to gather evaluative information that was

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used for revision purposes. Based on the collected data, recommenda-
tions for the revisions of the learning package were made by the
researcher.

The study was completed in two phases. The purpose of Phase One
was to identify Advertising and Promotional concepts needed for suc-
cessful entrepreneurship and to use these concepts in the development
of the instructional materials. Concepts were identified by means of
a questionnaire completed by 64 (30%) apparel shop merchants. These
concepts were organized into two modules focused on: 1) the prepara-
tion of an Advertising and Promotional budget and 2) the selection of
media and activities. The different conceptual facets included in the
budget materials were percentage of gross annual sales for Advertising
and Promotions for the year and for the opening month, as well as a
dollar allocation for this period of time. The selection of media
module focused in on the use of newspaper, radio-television, direct
mail, yellow pages and supplementary media. The promotional activi-
ties presented in the materials included window display, interior dis-
play, signing and various types of publicity. With the identification
of these concepts, a learning package was developed into the two mod-
ules according to a format standardized by the ASE Research Project.

Phase II included the evaluation of the learning package in a
pilot study and the formulation of recommendations on the basis of
the findings. A site for the pilot study was selected and potential
apparel shop entrepreneurs were recruited. A total of 11 trainees
were asked to complete the learning package and respond to the evalua-
tion instruments. Other participants in the pilot study included 12
Role Model Merchants, Panel of Business Experts and the teacher-

coordinator. Each participant completed the designated evaluation instruments. The data was compiled and analyzed by the researcher. The trainees' lack of achievement of the four performance objectives of the learning package were listed along with the terminal objective for consideration of revision. Characteristics of the Budgeting Module that were considered effective were directions, rationale, performance objectives, content, content check, Apply to Your Own Store Plans, information necessity and glossary. Those characteristics considered to be hindrances in Module One were self check and module length. Module Two's characteristics included additional revisions for Apply to Your Own Store Plans, information necessity and content adequacy.

Implications for revision were drawn by the researcher for those items in each module that were lacking in achievement. The implications were submitted to a PBE member who made specific suggestions in relation to those modular characteristics considered to be hindrances.

Final recommendations for the learning package were formulated by the researcher. The recommendations included adding hypothetical examples in terms of formulating a budget, selecting media, utilizing display and emphasizing the need for increasing the budget for a six-month period in order to open a new store. Other recommendations were formulated pertaining to the discussion on effectiveness of media and cost factors and inclusion of more support in the rationale to encourage the trainee to budget their advertising needs.

Recommendations for Further Study

Recommendations for the revision of the Advertising and Promotional learning package will be finalized by the Apparel Shop

Entrepreneurship Research Team in accordance with the goals of the

ASE Research Project. After the completion of those revisions,

further studies could be done in the following areas.

1) The format and procedures for developing the ASE learning
   package can be applied to other occupationally specific
   areas such as shoe shops, fabric shops or self-employed
   dressmaker shops.

2) The Advertising and Promotional learning package could be
   validated in a larger geographical area.

3) More types of instructional media can be incorporated
   into the learning package format such as cassette tapes
   and video.

4) Instructional materials for those apparel shops already
   in operation can be developed.

5) Characteristics of successful entrepreneurs can be identi-
   fied for further training in entrepreneurship.

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APPENDIXES

APPENDIX A

READABILITY GUIDELINES

In an attempt to assist the writer in preparing more effective written materials, Siegel (1974) made the following suggestions:

1. Do not begin a sentence with the indefinite pronoun, "this."

2. Avoid using colloquial expressions which may be meaningful to certain groups of people but not to others.

3. Use parentheses to set off explanations.

4. Use abbreviations only after a full explanation of the abbreviation has been provided, except where the abbreviation is very widely known.

5. Use only those symbols that are very common; otherwise, spell out the symbol.

6. Do not omit an article for the sake of brevity.

7. Do not omit the word that.

8. Do not omit a verb.

9. Place modifiers as close to the word they modify as possible.

10. Avoid splitting infinitives unless the sentence would be awkward.

11. Avoid using the word and to connect two unrelated ideas; either rephrase the sentence using other connectives or write two sentences.

12. Use the active voice rather than the passive voice (pp. 26-28).

Siegel (1974) commented on the vocabulary diversity in the following:

Don't assume that the reader has a diverse vocabulary. Find the words you want and stick to them. Repeat them in your writing. Even if your reader has a diverse vocabulary, word repetition will make the text more comprehensible (p. 10).

Shorter sentences are more readable. Other sentence structure should be considered. The characteristics to be avoided are: 1) prepositional phrases, 2) compound sentences and 3) complex sentences.

ED 097 629

Avoid excessive depth in sentences. Break a long sentence into a number of shorter sentences to reduce depth. Be "redundant" in your writing--repeat the facts you want to get across.

APPENDIX B

ACTIVE VERBS

PERFORMANCE TERMS

IDENTIFY	ORDER	DESCRIBE	CONSTRUCT	DEMONSTRATE	NAME
Select	Arrange	Define	Prepare	Show your work	Label
Distinguish	Sequence	Discuss	Draw	Show Procedure	List
Discriminate	List in order	Interpret	Make	Perform an experi-ment	Letter
Mark	Classify	Read	Build		Record
Match	Distinguish	Recite	Design	Perform the step(s)	Reiterate
Decide	Divide	Tell How	Formulate	Operate	Repeat
Choose	Discern	Tell what happens when	Reproduce	Remove	Restate
Judge	Isolate		Transcribe	Replace	Write
Pick	Sort	Evaluate	Calculate	Turn off/on	List orally
State	Type			(Dis)assemble	Explain
	Compare			(Dis)connect	
				Recite	

AFFECTIVE TERMS:

Supports	Pursue	Seek	Identify values	Teach
Reports	Investigate	Constructs	Differentiate	Attitude
Avocates	Committed to	Read	Compare	To indicate acceptance
Accept	Strive	Form habits	Analyze	To exhibit ability to cooperate
Reject	Receives	Appreciate	Become aware	

APPENDIX C

PROCEDURES ESTABLISHED BY THE APPAREL SHOP ENTRE-

PRENEURSHIP RESEARCH TEAM FOR DEVELOPING

INSTRUCTIONAL MATERIALS

1. Review literature related to: competency-based, individualized instruction, open entry-open exit, adult education and readability of written materials.

2. Review literature related to the four retail functions: accounting and control, buying and merchandising, operations and management and advertising and promotions.

3. Prepare a tenatative list of statements of possible concepts related to four functional areas of retailing.

4. Interview women's and men's apparel shop owners and managers to review tentative statements of concepts.

5. Consult with business experts in the areas of banking, business law and retail management for comments concerning tentative statements of concepts.

6. Formulate items based on the comments of retailers and business experts and list under the four retail functions for the questionnaire.

7. Select sample of apparel shops in Oklahoma and mail questionnaires.

8. Tabulate returns of the questionnaire.

9. Analyze findings based on importance of concepts as rated by respondents.

10. Validate concepts by conferring with additional retailers and business experts.

11. Establish format for the learning packages.

12. Group concepts into modules within the learning package

13. Write modules for each learning package using the following procedures:
    a. Write performance objectives using selected concepts.
    b. Prepare content needed to accomplish each performance objective.
    c. Write learning activities, based on each performance objective, including: content checks and self checks and Apply to Your Own Store Plans.
    d. Write rationale and instructions based on content.

14. Write terminal objective for learning package based on the performance objectives in modules.

15. Develop Individual Store Plans (ISP) for each learning package based on Apply to Your Own Store Plans.

16. Write pre/posttest for each learning package based on content check.

17. Field test one module for each learning package.

18. Prepare first draft of learning packages and ISPs based on reactions of participants in field test.

19. Field test first draft of learning packages using procedures for implementing open entry-open exit pilot study.

20. Make revisions based on reactions of participants in field test.

21. Duplicate materials with graphics, color coding and logo.

APPENDIX D

PROCEDURES ESTABLISHED BY THE APPAREL SHOP ENTRE-

PRENEURSHIP RESEARCH TEAM FOR FORMULATING

TRAINING PROGRAM REVISIONS

1. Select existing open entry-open exit school setting for pilot study.

2. Establish procedures for pilot study.

3. Schedule activities for participants in pilot study.

4. Recruit adult trainees for pilot study and contact other participants.

5. Develop evaluation instruments for each group of participants in the pilot study.

6. Administer evaluation instruments and collect data from each participant during the pilot study period.

7. Tabulate evaluation data:

   a. Establish identification code for each participant
   b. Establish numerical value for rating scales
   c. Record data from all participants

8. Analyze data in order to identify:

   a. Characteristics of training program which appear to contribute or hinder learning by adult trainees
   b. Evidences of entrepreneurial concepts developed and undeveloped by trainees

9. Formulate specific suggestions for improving hindering characteristics and undeveloped concepts.

10. Obtain role model merchants and panel of business experts reactions to specific suggestions for improvement.

11. Formulate recommendations for revision in each module.

12. Prioritize recommendations for revision in terms of:

    a. Major changes common to instructional materials and procedures
    b. Specific changes common to modules and learning packages

13. Revise instructional materials and procedures and make recommendations for use in open entry-open exit settings.

APPENDIX E

SUMMARY OF CRITERIA ESTABLISHED BY THE APPAREL

SHOP ENTREPRENEURSHIP RESEARCH TEAM FOR

SELECTING QUESTIONNAIRE SAMPLE

1. The sample would include geographical representation from the four quadrants of the state as divided by Highway I35 north and south and I40 east and west.

Number of Question-naires Mailed	Oklahoma Regions
54	NE
54	NW
54	SE
54	SW

Total: 216

2. The sample would include approximately the same number of stores in small or medium sized cities as the number of stores in large cities.

Number of Question-naires Mailed	City Size
24	Small (under 2,500)
76	Medium (2,500-25,000)
116	Large (25,000-over)

Total: 216

3. The sample would include approximately one-third of the stores representing men's wear and two-thirds representing women's wear.

Number of Question-naires Mailed	Store Type
133	Women's store
71	Men's store
12	Men's & Women's store

Total: 216

APPENDIX F

REFERENCES USED TO OBTAIN ADVERTISING
AND PROMOTIONAL CONCEPTS

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You Be the Judge: Newspaper Advertising Layout. Columbus, Ohio: Ohio State University Distributive Materials Lab (ED 11 225).

APPENDIX G

TENTATIVE LIST OF ADVERTISING AND

PROMOTIONAL CONCEPTS

ADVERTISING

Select media in terms of the advantages and disadvantages of:

--Newspaper

--Radio/Television

--Direct Mail

--Supplementary Advertising

--Magazine

Render newspaper layout

--Become familiar with tools

--Apply principles of layout

Write copy for ads

PROMOTIONS

Plan advertising and promotional budget

Develop sales campaign

Develop store image

--Develop logo

--Develop window display

--Develop interior display

APPENDIX H

MANAGEMENT QUESTIONNAIRE FOR
SMALL APPAREL STORES

Oklahoma State University

DEPARTMENT OF CLOTHING, TEXTILES & MERCHANDISING

STILLWATER, OKLAHOMA 74074
HOME ECONOMICS WEST 312
405 624-5034

November 24, 1976

Dear Apparel Merchant:

The attached questionnaire is concerned with the procedures involved in starting an apparel shop. This is part of a research study being made to help adults prepare to open a small women's or men's store. The study is funded by the U. S. Office of Education and has the cooperation of the Small Business Administration. The results of this study will be used in determining the basic information to be involved in a learning guide for adults who want to go into the apparel business.

It is most important to have your reactions and suggestions because you have had experience in operating and managing an apparel store. The enclosed questionnaire has been tested with a sample of store owners and has been revised in order to obtain the data needed. It will require a minimum of your time, approximately 30 minutes.

Please return this questionnaire by December 10. Copies of the findings will be sent upon request.

Sincerely yours,

Kathryn M. Greenwood
Project Director

Enc.

Management Questionnaire
for
Small Apparel Stores

Please indicate your feelings about the essential activities for someone who wishes to open a small apparel store. For each of the following statements indicate the degree of importance you would place on each of the items by placing a checkmark in the appropriate column.

Rating Scale
Very Important = Must be accomplished
Somewhat Important = Helpful and Desirable
Unimportant = Little or no value
Not Applicable = Does not apply

IS IT IMPORTANT TO. . .

1. Analyze your trading area in terms of:
   --Age of Customer . . . .
   --Income. . . . .
   --Location of Competition . . . .
   --Potential for your Business . . . .
   --Other (Specify)_____

2. Select your Store Location in terms of:
   --Cost per square foot. . . . .
   --Size (square footage) . . . .
   --Lease or Rent terms . . . .
   --Traffic Patterns. . . . .
   --Other (Specify)_____

3. Determine initial expenditures in terms of:
   --Interior, Fixtures, and Equipment . . . .
   --Merchandise Inventory . . . .
   --Operating Expenses. . . . .
   --Advertising Expenses. . . . .
   --Other (Specify)_____

4. Establish initial inventory mix in terms of:
   --Store Image . . . .
   --Customer characteristics. . . . .
   --Intended price lines. . . . .
   --Other (Specify)_____

5. Establish credit rating with:
   --Factors . . . .
   --Dun and Bradstreet. . . . .
   --Bankers . . . .
   --Other (Specify)_____

   BUYING and MERCHANDISING

6. Develop merchandise plan based on:
   --Projected annual sales volume at retail . . . .
   --Percentage of inventory mix by classification . . . .
   --Merchandise assortments by units. . . . .
   --Opening inventory by dollars. . . . .
   --Other (Specify)_____

Very Important / Somewhat Important / Unimportant / Not Applicable

7. Estimate the following items for
   --Initial markups . . . .
   --Markdowns . . . .
   --Maintained markups. . . . .
   --Cash Discount . . . .
   --Gross margin. . . . .
   --Net Profit. . . . .
   --Seasonal Turnover . . . .
   --Open-to-buy . . . .

8. Survey the potential vendors or resources by:
   --Visiting the Market . . . .
   --Contacting Sales Representatives. . . . .
   --Contacting Resident buying office . . . .
   --Consulting Manufacturers catalogs . . . .
   --Other (Specify)_____

ACCOUNTING and CONTROL

9. Establish an accounting system for recording
   --Sales . . . .
   --Purchases . . . .
   --Opening Inventory . . . .
   --Closing Inventory . . . .
   --Accounts Receivables. . . . .
   --Accounts Payable. . . . .
   --Other (Specify)_____

10. Select insurance programs for
    --Fire. . . . .
    --Liability . . . .
    --Theft and Burglary. . . . .
    --Employee Benefits . . . .
    --Surety Bond . . . .
    --Other (Specify)_____

11. Use the services of:
    --Accountant. . . . .
    --Attorney. . . . .
    --Tax Consultant. . . . .
    --Architect . . . .
    --Advertising Agency. . . . .
    --Resident Buying Office. . . . .
    --Local & Community Groups. . . . .
    --Trade Associations. . . . .
    --Other (Specify)_____

OPERATIONS and MANAGEMENT

12. Make Management decisions concerning:
    --Number of employees . . . .
    --Responsibilities of employees . . . .
    --Store hours . . . .

Very Important / Somewhat Important / Unimportant / Not Applicable

12. Determine Management Policies in terms of: (Cont.)
    --Store security system . . . .
    --Store maintenance procedures. . . . .
    --Personnel Fringe Benefits . . . .
    --Customer Services . . . .
    --Other (Specify)_____

13. Provide training for sales people in:
    --Personal Appearance . . . .
    --Fashion Trends. . . . .
    --Selling Techniques. . . . .
    --Sales Invoices and money handling procedures. . .
    --Other (Specify)_____

14. Specify physical appearance of store in terms of:
    --Store Fixtures. . . . .
    --Merchandise Layout. . . . .
    --Fitting rooms . . . .
    --Stock receiving . . . .
    --Alteration area . . . .
    --Gift Wrapping . . . .
    --Stock Storage . . . .
    --Window and Interior Displays. . . . .
    --Office. . . . .
    --Other (Specify)_____

ADVERTISING and PROMOTION

15. Plan store opening in terms of:
    --Store Name. . . . .
    --Logo. . . . .
    --Letterhead stationery . . . .
    --Exterior Sign . . . .
    --Packaging . . . .
    --Advertising Style . . . .
    --Direct Mail (Postcards, handbills). . . . .
    --Giveaways (matches, pens/pencils, balloons) . . .
    --Media . . . .
    --Other (Specify)_____

16. Plan promotional activities for opening the store:
    --Newspaper ads . . . .
    --Handbills . . . .
    --Radio Spots . . . .
    --Window and interior displays. . . . .
    --Fashion Shows . . . .
    --Special Events. . . . .
    --Other (Specify)_____

17. Select visual communications in terms of:
    --Printing techniques . . . .
    --Ad Layouts. . . . .
    --Copy. . . . .
    --Art Work. . . . .
    --Other (Specify)_____

P R O F I L E

NAME OF RESPONDENT_____

STORE NAME_____

ADDRESS_____

CITY/STATE/ZIP_____

TELEPHONE_____

*   *   *   *   *   *   *   *   *   *   *   *   *   *

1. Which of the following best describes your position in the field of retail apparel stores?

    ____ Owner   ____Manager   ____ Assistant Manager   ____ Buyer
    ____ Salesperson   ____ Other (Specify)_____

2. In which of the following classifications is the size of your city?

    ____Small (under 2,500)   ____Medium (2,500-25,000)   ____Large (25,000-over)

3. In which age bracket are you?

    ____ Under 30   ____ 30-49   ____ 50 and over

4. How many years of actual retail apparel store experience do you have?

    ____1 year   ____2-4 years   ____5-10 years   ____10-20 years   ____20 or more

5. Which of the following categories describes your store?

    ____ Ladies apparel   ____Men's apparel   ____ Men's and Women's
    ____ Other (Specify)_____

6. How many years has your store been in operation?

    ____1 year or less   ____ 2-4   ____ 5-10   ____ 10-20   ____ 20 or more

7. How many employees do you have?

    ____ Full-time   ____ Part-time

8. Do you consider your store to be small, medium, or large by the following sales volume?

    ____ $100,000 or less   ____ $100,000-$500,000   ____ $500,000 or more
           (Small)   (Medium)   (Large)

THANK YOU for completing the questionnaire. Please fold on the lines provided on the back of this sheet. Our return address should be seen on the outside. Staple the questionnaire once in the center to seal. Postage has been prepaid.

APPENDIX I

PACKAGE ASSESSMENT SCALE

A. PACKAGE COMPONENTS AND SEQUENCE

  1. Does the package include the following COMPONENTS:
    a. a rationale?
    b. cognitive learner objectives?
         and
       affective learner objective(s)?
         or
       psychomotor learner objective(s)?
    c. a diagnostic pre assessment?
    d. interactive learning activities?
    e. periodic self-assessments?
    f. a post test?
    g. package development feedback?
  2. Is the SEQUENCE of package components logical?

B. ANALYSIS OF PACKAGE COMPONENTS

  1. Does the RATIONALE tell:
    a. what is going to be learned?
    b. why this package should be studied?
  2. Are the LEARNER OBJECTIVES:
    a. important for intended learners?
    b. stated in terms which include:
      1 an active verb identifying desired behavior?
      2) content to which the behavior applies?
      3' conditions under which behavior will occur?
      4) minimum performance standards?
  3. Does the PRE-ASSESSMENT:
    a. measure learner status on each objective?
    b. have clear directions for completing and scoring?
    c. direct students to appropriate learning activities?
  4. Do the LEARNING ACTIVITIES:
    a. contribute to the achievement of package objectives?
    b. include clear directions?
    c. proceed in logical steps?
    d. occur in steps of proper size for intended learners?
    e. attract and maintain student interest?
    f. require active responses by learners?
    g. provide alternate learning activities for achieving each objective?
    h. employ media appropriate to package objectives?
  5. Do the LEARNER SELF-ASSESSMENTS:
    a. include clear directions for completing and scoring?
    b. provide frequent opportunity for learner self-assessment?
    c. direct students to appropriate learning activities?
  6. Does the POST-TEST:
    a. include clear directions for completing and scoring?
    b. measure learner status on each objective?
    c. parallel the pre-test form, length and difficulty?
      If a pre-test is present
  7. Does the PACKAGE DEVELOPMENT FEEDBACK:
    a. focus on important package characteristics?
    b. include objective and essay questions?

C. PACKAGE INSTALLATION AND OPERATION

  1. Does the package include an INSTRUCTOR'S GUIDE?
    If yes, does the INSTRUCTOR'S GUIDE:
    a. suggest ways instructors can use the package with students?
    b. suggest ways to help students schedule their learning time?
    c. suggest ways to record and report student progress?
    d. include evidence of package revision on the basis of user feedback?
    e. include evidence that appropriate package users achieve package objectives?
  2. Are the EQUIPMENT REQUIREMENTS of the package consistent with available audiovisual equipment?
  3. Is MEDIA QUALITY satisfactory?
  4. Are package materials easy for learners to use?
  5. Is the COST of installing and operating the package within the limits of available budget?
  6. Is the TIME required for package installation and operation within the limits of local schedule and calendar?

Figure 1

Hecht, Alfred R., Klasek, Kristine R. P.A.S.:"A Tool for Developing or
    Selecting Self Instructional Materials." Audio Visual Instruction.
    April 1975, p. 27.

APPENDIX J

DESCRIPTION OF LEARNING PACKAGE FORMAT

ESTABLISHED BY THE APPAREL SHOP

ENTREPRENEURSHIP RESEARCH

TEAM

Instructions: Standard instructions to identify
                                       the parts of the module and inform
                                       the trainee of the procedures to
                                       be used in the completion of a
                                       module.

Rationale: Information about the nature and
                                       importance of the concepts within
                                       each module.

Terminal Objective: Explicit statement to describe what
                                       the trainee will be able to do upon
                                       completion of a learning package.

Performance Objective: Explicit statement to describe what
                                       the trainee will be able to do upon
                                       completion of content segments within
                                       each module.

Content: Factual information about each per-
                                       formance objective.

Content Check: Multiple choice, true-false and
                                       matching items that represent defin-
                                       itions and applications of concepts.

Self Check: Correct answers to the content check
                                       items.

Apply to Your Own Store Plans: Instructions to apply content seg-
                                       ments to develop plans for opening
                                       an apparel shop.

Glossary: Definitions of terms and mathematical
                                       formulas in the module.

Individual Store Plans: Summary of the Apply to Your Own
                                       Store Plans from each module within
                                       a learning package.

Pretest/Posttest: Multiple choice, true-false and
                                       matching items to measure knowledge
                                       and comprehension of concepts in each
                                       learning package.

APPENDIX K

ADVERTISING AND PROMOTIONAL LEARNING PACKAGE

Advertising and Promotion
Learning Package

Module 1

Advertising/
Promotion
Budget

APPAREL
SHOP
ENTREPRENEURSHIP

1

INSTRUCTIONS

This is one of several modules in a learning package. The terminal objective for the learning package and several performance objectives for this module are listed on the next page. The terminal objective describes the behavior you must exhibit in order to complete this learning package. The performance objectives describe the behaviors you must exhibit in order to complete this module.

Each learning package has a pretest and a posttest based on the terminal and performance objectives. You must take the pretest before you begin the first module in each learning package. The pretest will be used for research purposes only. Your goal is to answer correctly eighty percent (80%) or more of the questions on the posttest and complete your Individual Store Plans for each learning package.

1. Read the objectives and the rationale first, then precede to the content of this module.

2. Study carefully the content pertaining to each of the performance objectives.

3. Follow the directions given for the learning activity related to each performance objective.
   a. Complete the Content Check section at the beginning of the learning activity. Use the self-checks and review the content if you answer any questions incorrectly.
   b. Complete the Apply to Your Own Store Plans section following the content check. Make tentative decisions and plans for opening your own store. Refer to the content as a guide in completing this section of the learning activity.

4. Follow the instructions given at the end of the last module in this learning package in order to complete your posttest.

Remember: Complete each of the modules in this learning package in consecutive order, as they are numbered.

OBJECTIVES

Terminal Objective:	When you have completed this learning package and have achieved 80% on the posttest, you will develop advertising/promotional budget plans and select appropriate advertising media and promotional activities.

Performance Objective:

1. Given a range of percentages and your own gross annual sales you will

   A. Approximate a percentage of your gross annual sales for advertising and promotion.

   3. Calculate the amount of money that you will spend on advertising and promotion for the year.

2. Given the average monthly percentage of sales volume, you will

   A. Select the month you plan to open.

   B. Calculate the amount of money that you will spend on your first month's advertising and promotion.

RATICNALE

Prospective customers must be invited, urged, even persuaded to buy, if a store is to succeed. A store may have ample merchandise and facilities to satisfy all potential customer wants and still fail to make a profit if sales are not effectively promoted.

So effective sales promotion is essential for every store. Promotion includes all those activities carried out by the seller to provide information that will lead to sales of products or services. The elements of promotion are personal selling, advertising, visual merchandising, special events, publicity and public relations. Sales promotion includes everything intended primarily to stimulate profitable sales, both immediately and in the future.

Why advertise? Unless people know you're in business, that you want them for your customers and that you have something they need for sale, the only people who will beat a path to your door are your creditors. People in the business have an adage: "Goods well bought are only half sold." The remaining half of selling is the business of arousing the customer's buying impulses. This is especially true if you're just starting out. But more than adages, there are some well-documented facts about your customer and advertising. National Retail Merchant's Association has estimated that an average store would go out of business in three to four years if it did not advertise. Since the average store loses between 20-25% of its customers each year, these must be replaced. There are thousands of case histories that show store success to be tied up with consistent advertising. The sales volume goes up in direct proportion to ad frequency rate.

Since there are so many aspects of sales promotion, this learning package will place its emphasis only on the function of advertising.

CONTENT

```
Performance Objective: Given a range of percentages and your own gross
                       annual sales you will

A. Approximate a percentage of your gross annual sales for adver-
   tising/promotion.

B. Calculate the amount     you will spend on advertising/promotion
   for the year.
```

What percentage of my gross annual sales should I spend for advertising and promotion?

As you work out your store's dollar budget and merchandise assortment plan, you'll need to work out an advertising/promotional plan. An ad/promotional plan is scheduled for a prescribed period of time. The practice is to first calculate how much you'll spend for the year. That sum is broken down into monthly figures. All promotional planning is made after calculating this monthly dollar figure. But the scope of the activities, themes or promotions is scheduled over a six month period of time. So the time for planning the ad/promotion budget is about sixty days before the start of a six month period. The format is usually a planning calendar.

What small businesspeople would like to spend for promotions and what they can afford to spend are seldom the same. Merchants must plan to make every dollar count.

The amount of money spent on advertising will, of course, depend on your individual operation. But the figure you'll derive is based on anticipated annual gross sales. Most small stores spend between 1-4% of their gross annual sales for their advertising year. The Bureau of Advertising found in a survey that women's apparel shops spend an average of 2.8% of their budgets on advertising, while men's averaged 2.9%. A recent survey prepared by the Small Business Reporter reported that the average advertising expenditures of selected small businesses to be 2.5% of annual gross sales.

For example, a men's apparel shop has decided to allocate 2.5% of their $150,000
gross annual sales in advertising. They will anticipate spending a total of
$3,750 for advertising and promotion.

$$\$150,000 \text{ X } 2.5\% = \$3,750.000$$

This estimate for advertising/promotion budget is based on those stores
already in operation. Their names are already in front of the public. Open-
ing costs will include expenditures for advertising and promotion which would
be considerable beyond the normal expenditures until the business "gets on its
feet." The expenditures will be the most the first week and will level off the
following weeks.

While you calculate the dollar expenditures for the year it needs to be
emphasized that your situation is unique. There are so many individual situa-
tions that no two advertising budgets will be alike. The dollar figure that
you arrive at in this objective is by no means final. It will serve as a
guideline that can be custom tailored to fit your advertising needs.

Before you decide on approximately how much of your gross sales you will
allocate for your ad budget, there are some things you must consider. They
are: 1) size of business; 2) competition; 3) merchandising campaigns;
4) type of customer; 5) size of area market; 6) length of time in the busi-
ness and 7) location.

A/P 1.5

CONSIDERATIONS FOR DECIDING HOW MUCH TO SPEND FOR ADVERTISING

SIZE OF BUSINESS--Advertising
makes a small business bigger.

MERCHANDISING CAMPAIGNS--Be sure
and consider what type of promotional
campaigns you're planning.

TYPE OF CUSTOMER--Are your customers
housewives who read daily newspapers
or teenagers who listed to radios?

SIZE OF MARKET AREA--Check
your market area. Do you need
city-wide coverage or do you
anticipate your customers coming
from a small local area?

COMPETITION--Often there is a
need to stand out from your
competition.
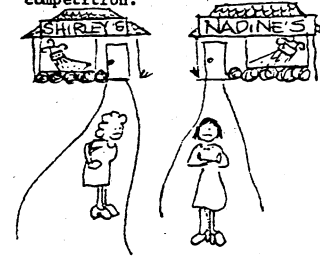
LOCATION--Your advertising may
have to make up for some of the
deficits of your location.
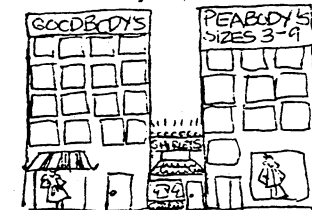
LENGTH OF TIME IN BUSINESS--Since
you're just starting, more initial
outlay for advertising may be
considered.

A/P 1.6

109

Formula for Calculating Dollar Expenditure Figure to be Spent for First Year Advertising/Promotions

While considering approximately what portion of your budget you think you will spend for advertising/promotion, we'll look at the simple method you'll use to derive the specific dollar figure. This method of calculating the dollar figure is simply called the percentage method.

Percentage Method

$ Your Estimated Gross Annual Sales

X Proportion of Gross Annual Sales by %

= How much you might plan to spend on advertising/promotion for the year.

For example, if your gross annual sales is $220,000 and you've decided to appropriate 2.5% of it for the advertising/promotions budget, you've allotted $5,500 for promotions.

$$\$220,000 \times 2.5\% = \$5,500$$

Content Check on Calculating the Dollar Expenditure Figure

DIRECTIONS: The following are multiple choice questions. Each question is followed by four possible answers. Choose the best answer from the four alternatives given, and write the letter of that answer in the space provided to the left of the question.

_____1. James and Joanne Mercantile are starting a junior shop. Since they're just starting out they've decided on budgeting 3% of their anticipated gross annual sales for the promotion of their shop. Given that their gross annual sales is $75,000, calculate their dollar expenditure figure. The Mercantiles will spend $_____ for their first year of advertising.

    A. $3,250
    B. $2,250
    C. $1,520
    D. $250

_____2. How far in advance should you start planning for your six month ad budget?

    A. Sixty days before the next six month period
    B. A week before the season breaks
    C. Six months before the next six month period
    D. Can't plan because advertising is so unpredictable

_____3. What is the best consideration an advertiser would have to take into account before deciding on an advertising/promotions percentage of the gross annual sales?

    A. Fixtures
    B. Type of customers
    C. Newspaper ad departments
    D. Decor of your store

Self Check on Back
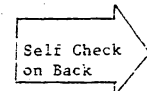
Apply to Your Own Store Plans

INSTRUCTIONS: These are proposed projections for your own store. Fill out the blanks with the correct response.

My anticipated gross annual sales are $_____.

I am setting aside _____% of my estimated gross sales for advertising.

How much I'm going to spend for the year on advertising is $_____.

CONTENT

Performance Objective: Given the average monthly percentage of seasonal
sales volume you will

A. Select the month you plan to open.

B. Calculate how much money you will spend on your first month's
advertising and promotion.

Seasonal Sales Pattern

Now that you've decided what your yearly ad/promotional budget might
be, next consider what proportion you'll spend for the month that you plan
to open.

Generally, these monthly figures are percentages of last year's gross
sales for the month. But because you have no past gross sales records you
will have to establish your opening month's promotional expenditures from a
different source.

Below is listed the average monthly sales volume for men's and women's
apparel stores. It lists by percentage the average sales generated by
apparel stores for a specific month. We will use this percentage as a sub-
stitute for last year's gross monthly sales figure.

Monthly Sales Volume Chart

Men's:

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
7.7	5.2	6.3	6.6	8.2	8.3	7.3	6.8	7.0	8.2	9.3	17.7	%

Women's:

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	
6.6	5.7	7.1	7.9	8.6	6.9	8.2	7.5	8.2	9.6	8.4	15.7	%

Before you determine how much money you'll spend to open the first month,
there are two other factors you should keep in mind.

One, since many potential customers haven't heard of your store, it is
important to advertise extensively for the first few weeks. One source sug-
gests 25% of the year's advertising funds be spent the first week, 10% the
second and gradually leveling off to your anticipated expenditures. That
means if you decided to spend $5,000 for the year on advertising and pro-
motion, $1250 would be spent the first week if you decided to allot 25%.

$$\$5,000 \times 25\% = \$1,250$$

We're not suggesting that this is a hard and fast rule. In any event, if
you double the percentage of monthly sales for the opening month, you will
be better prepared to generate sales for the opening. For example, if you
are opening a men's shop in June, the percentage of monthly sales is 8.3%.
But because you are opening, you will double that percentage.

Second, since advertising serves as a sales generator, the practice is
to spend more on advertising for the slower retail months and less in the
busier months. For example, looking at the Monthly Sales Volume Chart you
can see that two busier months would be November and December and the
slower months January and February. For the slower months you might consider
doing some promotional activities to generate more sales.

Money You Plan to Spend the Opening Month

The basis for calculating what you'll spend the first month is just
like the percentage method discussed in the first performance objective.
Substituting into the formula it will look like this:

Monthly Advertising/Promotional Figure

$ What you spend for the year in advertising/promotion

X Month's Sales Volume % (Doubled for the first month only)

= What you might plan to spend for the month

What you spend for the year was calculated in the first performance ob-
jective. Then it is multiplied by the percentage of sales (from the monthly

sales volume chart) for the month you're planning to open (which is doubled because of opening expenditures). The fugure you arrive at tells you how much money you anticipate spending for the opening month.

For example, suppose you're opening in July (7.3% of the year's business for women done in July). Your yearly allotment for advertising and promotion is $5,500. The opening month's budget will be $803.

$$\$5,500 \times 14.6\% \ (7.3\% \ \text{doubled}) = \$803$$
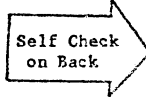
Check on Content for Monthly Expenditures

DIRECTIONS: The following are multiple choice questions. Each question is followed by four possible answers. Choose the best answer from the four alternatives given, and write the letter of that answer in the space provided to the left of the question.

_____1. James and Joanne Mercantile have decided to open their junior shop in August. Since they have no records to see how much to spend for that month they will consult the Monthly Sales Volume Chart. They have already calculated a yearly budget of $2,250 for advertising. The Mercantiles will spend $_____ for August.

A. $337.50
B. $150.00
C. $250.00
D. $1,923.00

_____2. Suppose they continued their advertising plans for the following month. Would they be more likely to spend

A. 14% of gross annual sales
B. 9% of gross annual sales
C. 8.5% of gross annual sales
D. 5.9% of gross annual sales

Self Check on Back

Apply to Your Own Store Plans

INSTRUCTIONS: These are proposed projections for your store. Fill out the blanks with the appropriate response.

The month I plan to open my store is _____.

My yearly advertising expenditures for the coming year $_____.

According to the Monthly Sales Volume Chart, the percentage for that month is _____%. Doubled it would be _____%.

Dollar expenditures for the month I plan to open $_____.

Complete the next module (GO)

A/P 1.12

GLOSSARY FOR TERMS

Advertising-Use of any paid space or time in any medium in order to promote
a product or service

Advertising/Promotion Budget-An expenditure plan calculated for the pro-
motion of your store and its activities.

Advertising Promotion Plan-A detailed projection for a specific period of time,
normally six months, for all advertising and promotions.

Planning Calendar-A monthly calendar which names all the retail seasons and
holidays. The calendar can be procured from any newspaper publisher and will
aid in planning any campaigns.

Sales Promotion-The coordination of advertising, display, publicity, and
personal salesmanship in order to promote profitable sales.

GLOSSARY FOR FORMULAS

Percentage Method
$ **Your Estimated Gross Annual Sales**
X **Proportion of Gross Annual Sales by %**
= How much you might plan to spend on
  advertising/promotion for the year.

Monthly Advertising/Promotional Figure
$ What you spend for the year in **Advertising/Promotional**
X Month's Sales Volume %
= What you might spend for the month

A/P 1.13

113

Advertising and Promotion
Learning Package

Module 2

Selection of Media & Activities

2

INSTRUCTIONS

This is one of several modules in a learning package. The terminal objective
for the learning package and several performance objectives for this module are
listed on the next page. The terminal objective describes the behavior you must
exhibit in order to complete this learning package. The performance objectives
describe the behaviors you must exhibit in order to complete this module.

Each learning package has a pretest and a posttest based on the terminal and
performance objectives. You must take the pretest before you begin the first
module in each learning package. The pretest will be used for research purposes
only. Your goal is to answer correctly eighty percent (80%) or more of the
questions on the posttest and complete your Individual Store Plans for each
learning package.

1. Read the objectives and the rationale first, then precede to the content of
   this module.

2. Study carefully the content pertaining to each of the performance objectives.

3. Follow the directions given for the learning activity related to each per-
   formance objective.
   a. Complete the Content Check section at the beginning of the learning
      activity. Use the self-checks and review the content if you answer any
      questions incorrectly.
   b. Complete the Apply to Your Own Store Plans section following the content
      check. Make tentative decisions and plans for opening your own store.
      Refer to the content as a guide in completing this section of the
      learning activity.

4. Follow the instructions given at the end of the last module in this learning
   package in order to complete your posttest.

Remember: Complete each of the modules in this learning package in consecutive
order, as they are numbered.

OBJECTIVES

Terminal Objective: When you have completed this learning package and
have achieved 80% on the posttest, you will develop
advertising/promotional budget plans and select
advertising media and promotional activities.

Performance Objectives:

1. Given the advantages and limitations of newspaper, direct mail,
   radio, Yellow Pages and the definitions of supplementary media,
   you will

   A. Select the specific media that you will plan to use for your
      store's opening.

   B. Approximate what proportion of the opening month's ad budget
      will be for the media you've selected.

2. Given a formula you will calculate how much money you will spend
   on each media you have chosen for your store.

3. Given the definition of various promotional activities you will
   consider which of these promotional activities you will use for
   opening your store.

CONTENT

Performance Objective: Given the advantages and limitations of newspaper, direct mail, radio, yellow pages and the definitions of supplementary media you will

A. Select specific media you will plan to use for your store's opening.

B. Approximate what proportion of the opening month's ad budget will be for the media you've selected.

Selecting Media

One of the most vital problems confronting the average merchant is how to obtain an effective promotional campaign with a limited budget. Very often it is too burdensome to carry with the high costs of production. They discover that only by 'lopping off' some of their hard earned income that they can appropriate enough money to make even a small dent. Nevertheless, selling cannot exist without advertising. This leaves two alternatives: 1) cut promotions and suffer loss of sales or 2) appropriate more money to spend than they feel they can afford. However, it has been proved that with smart direction a small ad budget can do a big job. How? Get the most for the least by 1) intelligent planning and 2) good timing by using the right medium at the right time. Since the major cost of advertising is the media (90%), that selected media must pinpoint the market as closely as possible. Media available to small retailers are newspaper, direct mail, radio, T.V., magazines, yellow pages, outdoor posters, and transit. In order to decide which media would be most profitable for your business, you must be aware of the advantages and limitations of each.

Advantages and Limitations of Advertising Media

Newspaper: A predominately local advertising media is the primary source used by small stores. Ninety-one percent of retailers surveyed by the Small Business Reporter used local newspaper. Shops surveyed by National Retail Merchant's Association planned 68% of their budgets for newspaper ads.

RATIONALE

Determining the right amount to spend for advertising is important because this expense is a major one. For the small business it is especially important that limited funds be used to the best possible advantage. Once the amount available for advertising and promotion is decided on, a more intelligent campaign can be planned involving selection of media and activities.

An advertisement relies on some medium or vehicle to transport its selling message to its customers. With the wide variety of media and activities available to merchants, it will be necessary to focus your funds.

Many small business advertisers may argue that they do select activities and media and grumble that "nobody heard it," "got no results," and "waste of money." So they have lost faith in advertising when it failed to produce sales. It is also a fact that unless you are consistent to the point of being repetitious, you may as well throw your money into the street. And being consistent takes planning.

Advantages:

1. Newspapers are current. People are prompted to take quick action on the ads they see.
2. Generally you can advertise more frequently because of the low cost.
3. Newspapers are flexible. Choose the best time for you and reach your target market. (The average independent store draws customers from not more than 1/4 mile.) You can also change copy quickly if the need arises.
4. Newspaper ad departments will generally be available to help you with your advertisement.
5. Because newspaper is a visual medium a lot can be done in the way of graphics and illustrations to catch the eye.

Limitations:

1. Newspapers have a short life span. Even though one newspaper has 2-3 readers it is generally discarded the next day.
2. The reproductive quality is not always high. Many times the position in the paper is not assured.
3. There is lots of competition for consumer attention because there are so many ads in a newspaper.
4. Circulation sometimes is larger than your trading area which results in wasted circulation. If your town is large enough, check to see if your newspaper publishes zoned editions.

Direct Mail: Direct mail is any form of advertising sent through the mail. This includes post cards, letters, leaflets, booklets, etc. Direct mail was ranked third in incidence of use among small businessmen in the Small Business Reporter Survey. Other surveys show that merchants will spend 15% of their budget for this medium. Because the retailer chooses his target market, this is the most personalized form of advertising he can do. Since this is the case, the success of direct mail hinges on building a current mailing list.

Advantages:

1. Because you are pinpointing your target market there is minimum waste.
2. Results checked accurately.
3. The advertiser controls his direct mail circulation.
4. Used successfully to introduce new seasons, sales events, and fashion shows.

5. Most versatile of all media. The printed message may be long or short.
6. Lends itself to a highly personalized message.
7. It's difficult for your competitors to guess what you're planning.

Limitations:

1. Difficult to pinpoint effectiveness.
2. Cost sometimes high.
3. People often consider it junk mail without looking at it.
4. Hard to maintain current mailing lists.

Radio: Besides newspaper, one of the most used mediums available to the retailer is radio. Merchants surveyed show they spend approximately 15-20% of their budgets in this area. Some authorities maintain that a saturation schedule of radio spots is ideal for a brand new shop. The National Retail Merchant's Association Convention mentioned buying frequent 30 second spots on a yearly basis.

Advantages:

1. Establishes personal contact with listeners/widespread circulation can choose a target market.
2. Most flexible medium in terms of changing and writing copy.
3. When aired, there is no immediate competition.
4. Few people are without radio--90% of U.S. homes have radios.
5. Good for sales or events, like opening.

Limitations:

1. Shortlived--one spot once a week is useless.
2. Ear communication is less effective than visual.
3. Wasted coverage.
4. Difficult to measure program appeal.

Yellow Pages: Every business with telephone service gets a free one-line listing in the classified section of the local telephone book. In addition to the one line, many buy yellow pages displaying advertising. Respondents of the Small Business Reporter Survey gave the yellow pages a second place as the most successful ad medium . . . the majority spending over one-half of their budget there.

Advantages:

1. Yellow page users are in the market for goods or services.

Limitations:

1. Limited to active shoppers.

Other Media: Other media that are less often employed by small retail merchants are listed below.

T.V.: Up until recently the costs of T.V. has made it probibitive to small businessmen. Now local non-network television stations are trying to make it as easy as possible for the small businessmen to get on T.V. Local stations cooperate in and/or supervise the production of commercials. They offer special buys such as joint sponsorship with other local businesses of televised special events.

Magazines: General interest magazines are not widely used by small businessmen. Unless your target area is a lot larger than local, much of the money is spent on wasted circulation.

Transit and Outdoor: Transit (inside cards and outside posters) and outdoor (printed sheet billboards and painted billboards) advertising are particularly effective in high-concentration population areas. As with other advertising, costs are based on exposure delivered.

Reading over the advantages and limitations of each medium will help you to make better decisions for media that would best suit your advertising needs. A point might be made here. Since the small business merchants work on such limited advertising budgets, whatever media you decide on, it must be used consistently. Often that means sticking to one or two media. That way you can be confident that your advertising is consistent. Also, the advertising done with that medium must be frequent. A little

here and a little there is wasteful. So remember two things when selecting and using media. BE CONSISTENT and MAKE IT FREQUENT.

Approximating Media Percentages

You've just given yourself some ideas of what advertising media you can anticipate using for promoting your opening store. As an additional aid to your plans, you can estimate what percentage of your budget you want each media to play in that opening.

For example, we mentioned that radio is especially good for saturation advertising. You may want to do 50% of the first month's promotional money there. Newspaper, also beneficial for opening businesses, might be 30% and handbills comprise 15%. The remaining funds may be reserved for other promotional activities.

LEARNING ACTIVITIES

Content Check on Media

DIRECTIONS: The following statements are True or False. In the blank before
each statement place a (+) if the statement is true. If the
statement is false place a (0) in the blank.

____1. Newspaper offers a good market penetration.

____2. The life expectancy of a newspaper is no longer than direct mail.

____3. Newspaper ads compete for the attention of their readers.

____4. Newspaper ad layouts can be changed in short order.

____5. The major disadvantage of radio is that it is short-lived.

DIRECTIONS: The following is a matching question. On the left side of the
page are definitions of media. On the right side of the page
are media. For each item on the left choose the best response
from the column on the right and write the letter of that response
in the blank provided.

Definitions	Media
____6. Media that lends itself to the most personalized message.	A. Radio
____7. The best medium for teenage shops.	B. Newspaper
____8. Used by active shoppers who are seeking a product or service.	C. Direct Mail
____9. Best medium to reach target customer.	D. Yellow Pages
____10. Traditional ad medium for small stores	

Self Check
on Back
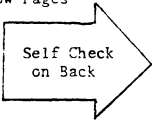
Apply to Your Own Store Plans

DIRECTIONS: Below are blanks for you to indicate what types of media you plan
on using for the OPENING MONTH. After you have made the decisions
on what type of media you will employ, write in the percentage
that media will play in that month's ad budget.

Media Choices	Percentage of the Ad/Promotions Budget Allocated for that Medium
1st Choice _____	_____
2nd Choice _____	_____
3rd Choice _____	_____
4th Choice _____	_____

A/P 2.9

How Much You Will Invest in Each Media for the Month

So far advertising funds have been allocated to 1) the month of
opening and 2) the specific media. All there is left to do is to fig-
ure how much you will spend on each medium that first month.

On page 2.9 you selected media for your opening and the extent they
would be used. Now you'll see in 5 figures how much you will invest in
each medium.

The calculation will use how much you are spending for the opening
month (which you calculated on page 113), multiplied by the proportion of
each media you plan to use (which you calculated on page 2.9).

Media Investment for the Opening Month Formula

$ How much I will spend the opening month

X % of medium you've planned   _____

= Dollar figure allocated for each medium

You've already calculated the money you plan to spend the opening
month. That is multiplied by the percentage of the media you plan to
use. The figure you arrive at will serve as a guideline to invest in
the media you've selected the opening month. For example, if you were
allocating $450 for your opening month and newspaper comprised 50% of
that figure, your expenditures for newspaper would be $225.

    $450   adv/promotion budget for month

  X   50% percentage allocated to newspaper

  = $225   dollar figure allocated to newspaper

A/P 2.10

LEARNING ACTIVITY

Content Check on Media Investment

DIRECTIONS: The following is a multiple choice question followed by four
              four possible answers. Choose the best answer from the four
              alternatives given, and write the letter of that answer in
              the space provided to the left of the question.

_____ 1. The Mercantiles have planned to spend 35% of their first month's
          advertising/promotion budget for radio. Given that their budget is
          $364.00, how much will they spend on radio? The Mercantiles will
          spend $_____ for radio ads.

          A. $236.80
          B. $40.00   Self Check
          C. $150.00   on Back
          D. $127.20

Apply to Your Own Store Plans

DIRECTIONS: This application will help you to anticipate how much you might
              spend the opening month for each media you've chosen. You will
              need the figure you have already planned to spend for the month
              on ad/promotions. You will also need to list the major choices
              of media and their percentages in order to calculate the dollar
              figure that will be spent on that media. Use as many calcula-
              tion spaces as you need.

1. The amount you will spend the opening month $ _____

    1st choice medium _____ and its percentage   X _____ %

    Dollar figure for that media   = $ _____

2. How much you will spend the opening month $ _____

    2nd choice medium _____ and its percentage   X _____ %

    Dollar figure for that media   = $ _____

3. How much you will spend the opening month $ _____

    3rd choice medium _____ and its percentage   X _____ %

    Dollar figure for that media   = $ _____

Apply to Your Own Store Plans - Continued

DIRECTIONS: You have already made media decisions for the OPENING MONTH.
              Keep in mind that the emphasis of ad/promotions should be
              placed around the OPENING DATE. Describe some ideas you have
              formulated for the media you're planning to use for the week
              prior and a week after the opening date.

For example, one advertiser describes his use of newspaper by using serveral
small ads printed with just the store name to spark curiosity prior to opening.
Afterwards, there would be a conscientious effort to show featured merchandise
along with the store name in the newspaper promotions.

	Prior to Opening Date	After Opening Date
NEWSPAPER		
RADIO		
DIRECT MAIL		
YELLOW PAGES		
OTHER		

Apply to Your Own Store Plans - Continued

There are some other kinds of decisions you will have to consider in
planning promotions:

Who is responsible for arrangements of ads?

Will professionals produce the ads?

How much will they cost?

How many times will they run?

What company will do the work?

What paper or stations will the ads be run on?

Events or merchandise to be featured.

Selecting Activities

Sales promotions is to inform, persuade, and remind customers of
your store. The distinguishing feature of successful promotions is
their timliness, either when planned in advance for certain days or
seasons or when capitalizing on some unexpected development. Merchants
have available to them calendars of suggested promotional events, usually
prepared months in advance by advertising departments which give all im-
portant dates likely to be useful in staging promotion.

Contrary to popular belief, previously successful promotions of a
seasonal or recurring nature are more likely to be effective when re-
peated than are entirely new ones. Each new promotion is an experiment
that may or may not prove successful. Of course, details may be changed,
but the basic idea of promotion will remain the same. Types of promo-
tion include: sales, public relations, special store features, premiums,
press publicity, identification devices, display and signing.

Definitions of Types of Promotional Activities

Display: Display is the most valuable media for delivering a selling
message to potential customers. Window and interior display are forms of
salespromotion that are indispensible to every store and is the most widely
used by all retailers. Display has the advantage of addressing itself to
the customer when they are physically present inside or directly outside
of the store. Windows serve as an introduction of the seller to the pur-
chaser and to entice the buyer into the store. Interior display or

merchandise that is displayed in the interior of the store is intended to guide the customer to specific departments and interest them in specific merchandise. Both window and interior displays have the advantage over other sales promotion activities in that they show off their merchandise itself rather than pictures or written descriptions.

Your initial outlay for display will be a greater percentage of your budget because you are just starting out. As things smooth out, the Department of Commerce estimated that for an annual sales volume of $50,000, approximately $600 was spent annually. This money generally covers a variety of functions, since the funds for mannekins and fixtures have already been allocated in another part of the budget. This money will be used for promotional supplies and display upkeep. This includes paint, interior and display signs, display props (paper flowers, boxes, tinsel, trellises, Christmas ornaments, trees, Easter eggs), pins and nails. Upkeep will include refurbishing mannekins, display tables and stands and display walls in case of breakage or damage.

Signing: A versatile medium, one which every business uses at least once, is the sign which makes the store's presence known in the market place. Included in signing are those placards used inside your shop to inform or direct traffic. This type of signing is very important because it calls attention to preferred or advertised merchandise.

Other activities that are employed by retailers are defined in brief below.

Identification Devices: Badges, signs, uniforms, letterheads, wrapping paper, shopping bags, logotypes.

Special Store Features: Exhibits, fashion shows, contests, demonstrations, visits by celebrities, classes.

Premiums: Calendars, balloons, lollipops, notebooks, pens, pencils, trading stamps, novelties, samples.

Special Services: Gift certificates, shopping services, charge accounts, delivery service.

Press Publicity: Press releases to newspapers, magazines.

Public Relations: Businesses often sponsor or participate in community events, join in local promotions, take part in community drives, volunteer store space for special exhibits or charity collection centers.

Point of Purchase Advertising: Eye-catching window displays attract the attention of bypassers and bring in customers who might not normally buy at the store.

Considering Expenditures

After reviewing all the promotional alternatives available, you will need to be aware that these, too, will be included in budget expenditures.

Since there are no scientific guidelines for estimating what proportion the activities should play in your plans, you still need to set aside some funds.

You may consider allotting a larger proportion if you plan on giving a fashion show, or running a contest. In some situations you may be required to pay for the use of models--while in other settings it wouldn't be necessary. In other instances, a vendor may provide bill stuffing materials. But there may be times when you're filling in your customer about a sale with your own materials. This is an area that should be investigated before specific dollar figures can be allotted.

Whatever activities you select to help promote your store the funds will be from the advertising/promotional budget. This means if you've decided that Advertising and Promotions will comprise 3% of your gross annual sales, that both media purchases and promotional activities will be derived from that part of the budget. As previously mentioned, there is no formula that will tell you what proportion each function will take of the ad budget. This will take some investigating on your part to make those proportions as individual as your store.

Content Check for Activities

DIRECTIONS: The following is a matching question. On the left side of the page are definitions of activities. On the right side of the page are activities. For each item on the left choose the best response from the column on the right and write the letter of that response in the blank provided.

Definitions	Activities
____1. Press releases to newspapers and magazines.	A. Premiums
____2. Volunteer for a community project.	B. Point of Purchase
____3. Design letterheads and shopping bags.	C. Interior Display
____4. Interior arrangements of merchandise.	D. Identification Devices
____5. Calendars, novelties, samples.	E. Public Relations
____6. Serve as an introduction to buyer.	F. Press Publicity
____7. Merchandise visible from the exterior of the store.	G. Windows

Self Check on Back
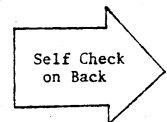
Apply to Your Own Store Plans

DIRECTIONS: Below is a checklist of activities that you may plan to investigate for the promotion of your store the OPENING MONTH. Check the activities you plan to use.

____ Fashion Shows   ____ Display Seasonal Themes
____ Press Publicity   ____ Interior Display Plans
____ Public Relations   ____ Identification Devices
____ Exterior Sign   (Shopping bags, etc.)
____ Contests   ____ Premiums
____ Trunk Showings   ____ Classes
                            ____ Demonstrations

Apply to Your Own Store Plans - Continued

DIRECTIONS: You have already made activities decisions for the OPENING MONTH. Keep in mind that the emphasis of ad/promotions should be placed around the OPENING DATE. Describe some ideas you have formulated for the media you're planning to use for the week prior and the week after the opening date.

For example, one shop owner started distributing shopping bags that advertised a fashion show that would be given on the opening day. The show would be featured at a business person's luncheon so press releases were written for the local paper. The store owner was able to utilize volunteers from the group as models. Door prize tickets were placed by each plate to be redeemed for merchandise at the shop at a later date.

	Prior to Opening Date	After Opening Date
Point of Purchase		
Interior Display		
Special Store Features		
Press Publicity		
Exterior Signs		
Premiums		
Special Services		
Other		

GLOSSARY FOR TERMS

Advertising-Use of any paid space or time in any medium in order to promote a product or service.

Display-A visual presentation of merchandise in retail stores. Display takes two forms - window and interior.

Identification Devices-Includes signs, badges, uniforms, letterheads, wrapping paper, shopping bags and logo types.

Interior Display-Visual presentation of merchandise inside the store.

Logo-A store signature developed in a specific type.

Merchandising Campaign-An endeavor to create sale of merchandise by a particular theme or activity.

Point of Purchase-Eye catching window displays to attract attention of bypassers and bring in customers who might not normally buy at the store.

Premiums-Includes calendars, balloons, lollipops, notebooks, pens, pencils, trading stamps, novelties and samples.

Press Publicity-Are press releases to newspapers and magazines.

Public Relations-Businesses often sponsor or participate in community events, join in local promotions, take part in community drives, volunteer store space for special exhibits or charity connection centers.

Sales Promotion-Includes all selling activities that are not in the ordinary sales routine that supplement advertising and personal selling.

Signing-Use of placards around the store to inform and direct customers.

Special Services-Includes gift certificates, shopping services, charge accounts and delivery services.

Special Store Features-Includes exhibits, fashion shows, contests, demonstrations, visits by celebrities, classes.

GLOSSARY FOR FORMULAS

Media Investment for the Opening Month Formula
$ How much I will spend the Opening Month
X % of medium you've planned
= Dollar figure allocated for each month

```
┌─────────┐
│  STOP   │
└─────────┘
```

Posttest: When you have completed each module in this learning package you are

ready to take the posttest.

1. Contact your teacher coordinator and arrange to take the posttest.

2. Conference with teacher-coordinator regarding test after your posttest
   has been scored.

3. You must answer correctly 80% of the questions on the posttest before
   you can schedule a conference with your Role Model Merchant (RMM).

4. If you do not answer correctly 80% of the questions on this posttest,
   review the content and the learning activities related to the questions
   you did not answer correctly and take the posttest again.

Role Model Merchant (RMM) Conference: When you have answered correctly 80% of

the questions on the posttest you are ready to conference with your RMM.

1. Contact your teacher-coordinator and arrange for a conference with a RMM.

2. The RMM conferences will be scheduled on Thursday night only. A 30-
   minute conference will be arranged to complete the ISP for each Learning
   Package. You may wish to schedule a 1-hour conference and complete the
   ISP for two Learning Packages in order to expedite your progress.

3. Complete your ISP plans for each learning package during the RMM con-
   ferences.

4. Use the RMM Conference Guide included with the Individual Store Plans
   for each learning package.

Panel of Business Experts (PBE) Presentation: When you have completed the RMM

conferences for each of the five learning packages you will present your ISP to

the PBE. Follow the instructions in your Apparel Shop Entrepreneurship Folio.

Exit Conference: When you have presented your ISP to the PBE you will arrange

a final conference with the teacher-coordinator. Follow the instructions in your

Apparel Shop Entrepreneurship Folio.

A P 2.21

Learning Package

ADVERTISING AND PROMOTION

POSTTEST

Your goal is to answer correctly 80% of the following questions. If you answer correctly 14 of the questions, you will have passed this test.

Section I: Multiple Choice

DIRECTIONS: The following are multiple choice questions. Each question is followed by four possible answers. Choose the best answer from the four alternatives given, and write the letter of that answer in the space provided to the left of the question.

_____1. How far in advance should you start planning for your six month ad budget?

A. Sixty days before the next six month period
B. A week before the season breaks
C. Six months before the next six month period
D. Can't plan because advertising is so unpredictable

_____2. What is the best consideration an advertiser would have to take into account before deciding on an advertising/promotions percentage of the gross annual sales?

A. Fixtures
B. Type of customers
C. Newspaper ad departments
D. Decor of your store

_____3. The Mercantiles have planned to spend 35% of their first month's advertising/promotion budget for radio. Given that their budget is $364.00, how much will they spend on radio? The Mercantiles will spend $_____ for radio ads.

A. $236.80
B. $ 40.00
C. $150.00
D. $127.20

Section II: True - False

DIRECTIONS: The following statements are True or False. In the blank before each statement place a (+) if the statement is true. If the statement is false place a (0) in the blank.

_____4. Newspaper offers a good market penetration.

_____5. The life expectancy of a newspaper is no longer than direct mail.

_____6. The major disadvantage of radio is that it is short-lived.

_____7. Newspaper ads compete for the attention of their readers.

Section III: Matching

DIRECTIONS: The following is a matching question. On the left side of the page are definitions of media. On the right side of the page are media. For each item on the left choose the best response from the column on the right and write the letter of that response in the blank provided.

Definitions   Media

_____8. Media that lends itself to the   A. Newspaper
        most personalized message.
                                                 B. Direct Mail
_____9. Used by active shoppers who are
        seeking a product or service.   C. Yellow Pages

_____10. Best medium to reach target cus-
         tomer.

_____11. Traditional ad medium for small
         stores.

DIRECTIONS: The following is a matching question. On the left side of the page are definitions of media. On the right side of the page are activities. For each item on the left choose the best response from the column on the right and write the letter of that response in the blank provided.

Definitions   Activities

_____12. Press releases to newspapers and   A. Premiums
         magazines.
                                                 B. Interior Display
_____13. Volunteer for a community project.
                                                 C. Identification Devices
_____14. Design letterheads and shopping bags.
                                                 D. Public Relations
_____15. Interior arrangements of merchandise.
                                                 E. Press Publicity
_____16. Calendars, novelties, samples.

APPENDIX L

PRE-POSTTEST AND INDIVIDUAL STORE PLANS

Advertising and Promotion
Learning Package

Individual Store Plans (I.S.P.)

APPAREL
SHOP
ENTREPRENEURSHIP

STOP

1. Have you completed all the learning activities contained within each module of this learning package?

2. Have you answered correctly 80% of the questions on this learning package posttest?

3. Have you contacted your teacher-coordinator and scheduled a conference with your Role Model Merchant?

If you answered yes to the three above questions, turn to the next page and read the RMM Conference Guide.

R.M.M. CONFERENCE GUIDE

The RMM Conference Guide is a step-by-step outline of your RMM Conference. Be sure that you read through the guide before your RMM Conference.

I. Review briefly your Introductory Profiles with the RMM.

   A. Indicate your reasons for wanting to become an entrepreneur.

   B. Describe your Store Profile.

   C. Indicate tenative projected store budget.

II. Review each of the modules in the Learning Package with the RMM.

   A. Beginning with the first module, point out each performance objective and the content sections.

   B. Discuss the portion of the learning activities for each performance objective that concerns your store plans (Apply to Your Own Store Plans).

   C. With the help of your RMM, make a final decision about your ISP for each module before going on to the next module.

   D. Review your completed ISP again with the RMM and make any additional changes.

   E. Summarize the questions and suggestions made by your RMM.

III. Thank the RMM for their ideas and suggestions.

IV. After your RMM Conference, give your completed ISP to the teacher-coordinator to have duplicated for your ASE Folio and for the PBE Conference.

DIRECTIONS FOR COMPLETING ISP's

The following step-by-step directions are numbered and labeled identically to your Individual Store Plans found on the following pages. These planning sheets should serve as a guideline to present your plans to the Panel of Business Experts. A reference to the module and page number is given in parentheses. You will·want to refer to these modules and pages while you and your role model merchant are making final decision.

1. BUDGET INFORMATION

    A. **Write** in gross annual sales figure you plan for your **store** (A/P 1.9).

    B. **Write** the percentage of the gross annual sales that will be allotted **for** advertising/promotions (A/P 1.9).

    C. Write in the dollar figure to be allotted for advertising/promotion for the year (A/P 1.9).

2. OPENING MONTH INFORMATION

    A. **Write** in the month you plan to open (A/P 1.13).

    B. Write in the date you plan to open (A/P 1.13).

    C. **Write** in the dollar figure to be allotted for advertising/promotion for the month (A/P 1.13).

3. MEDIA SELECTIONS

    A. **List** in order by choice what media you anticipate using and what percentage of the monthly budget it will be (A/P 2.9).

    B. Write in the dollar figure to be allotted for each media selected (A/P 2.12).

    C. List major promotional ideas you've developed for the media you've chosen (A/P 2.13).

4. ACTIVITY SELECTION

    A. Write in major activities you plan to use (A/P 2.19).

    B. List major promotional ideas for your activities (A/P 2.20).

A/P 3

ISP 1

INDIVIDUAL STORE PLANS (ISP)
Advertising and Promotion

1. BUDGET INFORMATION

    A. $ _____ Gross Annual Sales

    B. _____% For Yearly Advertising/Promotions Budget

    C. $ _____ Dollar figure for the year's advertising/promotion

2. OPENING MONTH INFORMATION

    A. _____ Opening Month

    B. _____ Opening Date

    C. $ _____ Dollar figure for the opening month's advertising/promotion

3. MEDIA SELECTIONS

    A. _____ First Media Choice

        _____ % of Monthly Ad Budget

    B. _____ $ of Monthly Ad Budget

    C. List major promotional ideas for this media:

    A. _____ Second Media Choice

        _____% of Monthly Ad Budget

    B. _____$ of Monthly Ad Budget

    C. List major promotional ideas for this media:

A/P 4

Name _____

ISP, Advertising and Promotion - Continued

    A. _____ Third Media Choice

        _____% of Monthly Ad Budget

    B. _____$ of Monthly Ad Budget

    C. List major promotional ideas for this media:

    A. _____ Fourth Media Choice

        _____% of Monthly Ad Budget

    B. _____$ of Monthly Ad Budget

    C. List major promotional ideas for this media:

----

4. ACTIVITY SELECTION

    A. List major activities:

    B. List major promotional ideas for these activities:

SUMMARY OF QUESTIONS AND SUGGESTIONS MADE BY RMM

Questions:

Suggestions:

```
 ___
/STOP\
\____/
```

1. Have you completed five ISP's?

    If no, then take the pretest for one of the remaining learning packages
        and begin working through that package.

    If yes, schedule your PBE conference and ask the teacher-coordinator for
        the PBE Conference Guide.

A/P 7

APPENDIX M

APPAREL SHOP ENTREPRENEURSHIP TRAINING

PROGRAM PUBLICITY

SOCJC course trains

apparel shop owners

Owning an apparel store can be satisfying and profitable, but up to 20 percent fail in the first year, according to Dr. Kathryn M. Greenwood, Oklahoma State University professor of clothing, textiles and merchandising.

Therefore, she has developed a program of instruction especially for owners or potential owners of small women's or men's apparel shops.

The program will be presented in a special non-credit eight-week course starting June 14 at South Oklahoma City Junior College, 7777 S. May.

Classes will meet from 7:30 to 10:30 p.m. each Tuesday and Thursday for eight weeks; although participants may choose to attend fewer classes by taking advantage of the package of instructional materials developed especially for the program.

Dale Johnson, director of Community Services for SOCJC, explained that a 15-unit learning packet for the course permits students to work on their own and evaluate their own progress through a "flexible pacing" system of individualized instruction used in conjunction with selected class meetings selected by participants.

Students will be instructed on correct methods for developing plans for opening stores plus information recommended by most financial and management experts for successful operation.

Each Tuesday, students will have an opportunity to present their individual shop ownership plans to a panel of experts. On Thursdays, conferences with apparel merchants are featured to allow students to share the experience of persons successful in business.

Cost of the entire program, including the learning packet, is $56. For more information, interested persons may contact Johnson at 682-1611.

APPENDIX N

DESCRIPTION OF PILOT STUDY SCHEDULING

<u>June 13 - 17</u>

Tuesday: 7:30-8:30 Orientation Session for adults entering program
          8:30-10:30 Administer pretest for first learning package
                     Trainees begin work on first learning package
                     Trainees may take posttest for first learning
                       package
                     Trainees may compile Individual Store Plans and
                       make arrangements for Role Model Merchant
                       Conference
                     Trainees may begin another learning package

Thursday: Role Model Merchant Conferences along with continuous
           process of working through learning packages (pre/
           posttests, Individual Store Plans, schedule Role
           Model Merchant Conferences)

<u>June 20 - 24</u>

Tuesday: Orientation Session to adults entering program
Thursday: Role Model Merchant Conferences

<u>June 27 - July 1</u>

Tuesday: Orientation Session
Thursday: Role Model Merchant Conferences

<u>July 4 - July 8</u>

Tuesday: Orientation Session
Thursday: Role Model Merchant Conferences

<u>July 11 - July 15</u>

Tuesday: First Panel of Business Experts Presentation (earliest
             exit data and exit conference)
Thursday: Role Model Merchant Conferences

<u>July 18 - July 22</u>

Tuesday: Panel of Business Experts presentations and Exit
             Conference
Thursday: Role Model Merchant Conferences

<u>July 25 - July 29</u>

Tuesday: Panel of Business Experts Presentation and Exit
             Conference
Thursday: Role Model Merchant Conferences

<u>August 1 - August 5</u>

Tuesday: Panel of Business Experts Presentation and Exit
             Conference
Thursday: Final Panel of Business Experts Presentation and Exit
             Conference (last exit date)

APPENDIX O

SAMPLE EVALUATION INSTRUMENTS

Name_____

TRAINEE'S MODULE EVALUATIONS

(Title of Learning Package)

Module # :_____(Title)_____

DIRECTIONS: Please check the box which indicates how you feel about the following statements and note any comments.

> Strongly agree: agree completely with the statement
> Agree: agree somewhat with the statement
> Uncertain: can neither agree nor disagree with the statement
> Disagree: disagree somewhat with the statement
> Strongly disagree: disagree completely with the statement

	SA	A	U	D	SD	COMMENTS
1. The directions for the module were easy to understand.						
2. The rationale for the module emphasized the importance of the content.						
3. The performance objectives were easily understood.						
4. The performance objectives were attainable.						
5. The content was easily understood.						
6. The content was adequate.						
7. The content checks enabled me to apply the information to my own store plans.						
8. The self-checks were helpful.						
9. The apply to your own store plans section helped me to make my own store plans.						
10. The glossary was helpful.						
11. The module was too short.						
12. I felt that I needed the information in this module.						

DIRECTIONS: Please write suggestions for improving this module below.

CIRCLE APPROXIMATE TIME: ½ hr.   1 hr.   1½ hr.   2 or more hrs.

TRAINEE'S SELF-EVALUATION OF TERMINAL OBJECTIVES

Dear Trainee:

In a short while, you will discuss your Individual Store Plans (ISPs) before a Panel of Business Experts (PBE). Listed below are the terminal objectives of each ISP and a set of criteria. Please use the criteria to evaluate your ISPs, then rate your achievement of the terminal objective.

NAME_____

DATE_____

DIRECTIONS: Circle the code letter that best describes your reactions to the set of criteria and the terminal objective listed below. Read and react to the criteria first, then, rate your achievement on the terminal objective.

CRITERIA:	TERMINAL OBJECTIVES:
Code → E - Excellent: needs no adjustment	Code → SA - Strongly Agree: agree complet with statement
G - Good: needs minor adjustment	A - Agree: agree somewhat with statement
S - Satisfactory: needs several improvements	U - Uncertain: neither agree or disagree with statement
P - Passable: needs reexamination; approval given with reservations	D - Disagree: disagree somewhat with statement
NA - Not Adequate: information not adequate to make judgments	SD - Strongly Disagree: disagree completely with statement

---

1. CRITERIA FOR INTRODUCTORY PROFILES

a) Realistic reasons for wanting to become a small business entrepreneur

    E   G   S   P   NA

b) Recognition of personal traits desirable for entrepreneurship.

    E   G   S   P   NA

c) Appropriate reasons for the type of ownership selected

    E   G   S   P   NA

d) Appropriate identification of type of store

    E   G   S   P   NA

e) Appropriate identification of potential target customers

    E   G   S   P   NA

f) Appropriate identification of store image

    E   G   S   P   NA

g) Appropriate identification of store name

    E   G   S   P   NA

1. TERMINAL OBJECTIVE

This trainee has realistically identified personal characteristics necessary for an entrepreneur, developed a store profile and proposed a store budget.

    SA   A   U   D   SD

CRITERIA:	TERMINAL OBJECTIVES:
Code → E - Excellent	Code → SA - Strongly Agree
G - Good	A - Agree
S - Satisfactory	U - Uncertain
P - Passable	D - Disagree
Na - Not Adequate	SD - Strongly Disagree

h) Realistic selection of location and site

    E   G   S   P   NA

i) Realistic projection of gross annual sales

    E   G   S   P   NA

j) Realistic appraisal of square footage

    E   G   S   P   NA

k) Proposed store budget realistically projected expenses and income

    E   G   S   P   NA

---

2. CRITERIA FOR ACCOUNTING AND CONTROL

a) Balance sheet realistic

    E   G   S   P   NA

b) Personal financial statement adequate

    E   G   S   P   NA

c) Appropriate use of store's sales slip

    E   G   S   P   NA

d) Realistic plans for determining cash proof

    E   G   S   P   NA

e) Realistic plans for determining cash flow

    E   G   S   P   NA

f) Realistic short-range and long-range goals for the store

    E   G   S   P   NA

g) Use of customer credit carefully planned

    E   G   S   P   NA

h) Knowledgeable about insurance needs

    E   G   S   P   NA

i) Knowledgeable about trade credit policies

    E   G   S   P   NA

2. TERMINAL OBJECTIVE

This trainee has constructed the necessary financial statements to open an apparel store.

    SA   A   U   D   SD

CRITERIA:

Code → E - Excellent
       G - Good
       S - Satisfactory
       P - Passable
       NA - Not Adequate

TERMINAL OBJECTIVES:

Code → SA - Strongly Agree
        A - Agree
        U - Uncertain
        D - Disagree
        SA - Strongly Disagree

CRITERIA:

Code → E - Excellent
       G - Good
       S - Satisfactory
       P - Passable
       NA - Not Adequate

TERMINAL OBJECTIVES:

Code → SA - Strongly Agree
        A - Agree
        U - Uncertain
        D - Disagree
        SD - Strongly Disagree

3. CRITERIA FOR BUYING AND MERCHANDISING
   a) Realistic plans for B.O.M. Inventory

      E   G   S   P   NA

   b) Realistic plans for E.O.M. Inventory

      E   G   S   P   NA

   c) Realistic plans for monthly open-to-buy

      E   G   S   P   NA

   d) Profitable planned markup

      E   G   S   P   NA

   e) Appropriate selection of merchandise to be emphasized

      E   G   S   P   NA

   f) Appropriate decision regarding use of buying office

      E   G   S   P   NA

   g) Appropriate identification of fashion market centers

      E   G   S   P   NA

3. TERMINAL OBJECTIVE

This trainee has developed a realistic opening inventory buying plan for an apparel store.

SA   A   U   D   SD

4. CRITERIA FOR OPERATION AND MANAGEMENT
   a) Store layout well planned

      E   G   S   P   NA

   b) Realistic allocations for remodeling, decorating, fixture and equipment

      E   G   S   P   NA

   c) Employee job descriptions appropriate for proposed type of store

      E   G   S   P   NA

   d) Adequate number of employees proposed

      E   G   S   P   NA

   e) Realistic decisions pertaining to store operation

      E   G   S   P   NA

4. TERMINAL OBJECTIVE

This trainee has developed a realistic operational budget and made sound management decisions for an apparel store.

SA   A   U   D   SD

5. CRITERIA FOR ADVERTISING AND PROMOTION
   a) Realistic advertising budget for the store

      E   G   S   P   NA

   b) First month's advertising budget well planned

      E   G   S   P   NA

   c) Appropriate selections of advertising media for proposed type of store

      E   G   S   P   NA

   d) Realistic allocations made in the advertising budget for each medium selected

      E   G   S   P   NA

5. TERMINAL OBJECTIVE

This trainee has developed a realistic advertising budget and selected appropriate advertising media for an apparel store.

SA   A   U   D   SD

APPENDIX P

EXAMPLE OF PILOT STUDY PARTICIPANT PROFILE

PANEL OF BUSINESS EXPERTS (PBE) PROFILE

Thank you for sharing your time and expertise to help adults interested in going into business for themselves. We appreciate your willingness to serve as a member of our Panel of Business Experts (PBE) for our research project. As a research participant we ask that you please fill in the following information concerning your business experience. THIS INFORMATION WILL BE KEPT CONFIDENTIAL.

DATE_____

Person responding:_____

Position: __Store Owner __Store Manager __Lawyer __Accountant __Banker

　　　　　Other (specify)_____

Name of Business_____

Business address:_____
　　　　　　　　　　(street)　　　　(city)　　　　(state)　　(zip)

Telephone:_____

Would you be willing to serve as a PBE in the future?　____Yes　____No

If you answered "yes," please circle the date(s) you would be willing to serve.

　　　　　　　　7/19　　7/26　　8/2　　8/4

　　　*　　　*　　　*　　　*　　　*　　　*　　　*　　　*

RETAIL EXPERIENCE:

1. Check (√) the boxes below which best describe the extent of your expertise related to the following:

	NONE	SOME	MUCH
Accounting and Control			
Buying and Merchandising			
Operations and Management			
Advertising and Promotion			
Law			
Finance			

2. How many years of actual business experience do you have? (Check (√).

　　___1 year　　___2-4 years　　___5-10 years　　___10-20 years　　___20 or more years

3. List the three most recent business positions you have held.

YEAR	POSITION	LENGTH OF TIME	NAME OF FIRM	LOCATION

EDUCATIONAL BACKGROUND:

Check (✓) the type of school you have attended	Check (✓) the kinds of courses you have had	Check (✓) each kind of diploma you have obtained and indicate the date received
___High School	___Acct./Bkkg.	___High School
___Junior College	___Retail/Bus. Math	___Jr. College
___College/University	___Advertising	___B.S. or B.A.
___Other (List) _____	___Economics	___M.S. or M.A.
_____	___Fashion Mdsg.	___J.D.
_____	___Management	___Other (List)
_____	___Marketing	
	___Law	
	___Finance	
	___Other (List)_____	

(Date)
(Date)
(Date)
(Date)
(Date)
(Date)
(Date)

THANK YOU FOR COMPLETING THIS PBE PROFILE.

APPENDIX Q

APPAREL SHOP ENTREPRENEURSHIP CRITERIA FOR

IMPROVING MODULAR CHARACTERISTICS

1. Restate

    a. restructure sentense

    b. increase readability

2. Clarify

    a. adding or deleting explanatory information related to
        existing concepts

    b. adding or deleting explanatory information related to
        additional concepts

3. Reorganization of format

4. Reexamine criteria for learning package content

APPENDIX R

DESCRIPTION OF PILOT STUDY PARTICIPANTS

ADULT TRAINEE (N=11[a])

Sex	Retail Experience	Length of Retail Experience
Male - 1	Sales - 6	Less than one year - 3
Female - 10	Buying - 1	One to two years - 2
	Store Manager - 1	Two or more years - 2

Other Experience	Education	Coursework
Clerical/Sales - 3	High School	Acct/Bkking - 5
Proffesional - 1	Diplomas - 11	Economics - 5
Teachers - 2	B.S. - 2	Bus. Math - 5
Wholesale - 1	M.S. - 2	Advertising - 2
		Retail Math - 2
		Marketing - 1
		Management - 2

Entrepreneurial Goals	Desire to Learn from the Program
Open women's shop - 5	How to open a shop - 3
Open fabric shop - 1	Specifics on buying and manage-
Open shoe shop - 1	ment - 3

[a]All trainees did not respond to all items

ROLE MODEL MERCHANTS (N=12[a])

Sex	Retail Experience			Coursework
Male - 6	Acct/Control	- Much	- 4	Acct/Bkking - 7
Female - 5		Some	- 6	Economics - 7
	Buying/Mer-			Bus. Math - 8
	chandising	- Much	- 9	Advertising - 2
		Some	- 2	Retail Math - 4
	Operations/			Marketing - 5
	Management	- Much	-10	Management - 4
		Some	- 1	Faship Mdse - 0
	Advertising/			
	Promotions	- Much	- 8	
		- Some	- 3	

Education	Store Description		Store Operation	
High School Dipl. - 11	Individually Owned	- 6	Less than 1 yr.	- 3
B.S. - 6	Corporation or		Two to four yrs.	- 2
	Chain	- 4	Five to ten yrs.	- 2
	Individually		Eleven to twenty	- 3
	Owned Corp.	- 2	Twenty or more	- 1

ROLE MODEL MERCHANT (Continued)

Operation of Store		Type of Store	
$100,000 or less	- 2	Men's	- 2
$100,000-$250,000	- 4	Women's	- 8
$250,000 or more	- 5	Other (fabric, childs, bridal, cosmetics)	- 5

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[a]One role model merchant served twice; all of the Role Model Merchants did not respond to all of the items.

PANEL OF BUSINESS EXPERTS (N=16[a])

Sex	Retail Experience	Length of Business Experience
Male - 12	Acct/Control	Five to ten years - 2
Female - 2	Much - 5	Ten to twenty years - 3
	Some - 4	Twenty or more years - 11
	Buying/Merchandising	
	Much - 5	Education
	Some - 3	
	Operations/Management	High School diploma - 12
	Much - 6	B.S./B.A. - 6
	Some - 4	M.S./M.A. - 1
	Advertising/Promotions	J.D. - 2
	Much - 5	Honorary Ph.D. - 1
	Some - 3	
	None - 2	Positions Represented
	Law	
	Much - 2	Store Owner - 4
	Some - 1	Store Manager - 2
	None - 3	Banker - 2
	Finance	SCORE - 3
	Much - 6	
	Some - 3	
	Tax	
	Much - 1	

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[a]Four panel of business experts served twice, making the total sixteen; all of the panel members did not respond to all of the items.

APPENDIX S

RESEARCH PROJECT ABSTRACT

ABSTRACT

INSTRUCTIONAL MATERIALS FOR ADULT ENTREPRENEURSHIP OF
APPAREL SHOPS

This proposal is designed to select entreprenurial competencies and
develop instructional materials for use in an open entry-exit setting by
potential apparel shop owners. The organization of the instructional materials
will incorporate the four major retail functions: accounting and control; buying
and merchandising; operation and management; and advertising and promotion. In-
dividualized, self-instructional and self-evaluative learning packages will be
developed based on the entreprenurial competencies related to each of the four
retail functions.

The strategy for the development, use and evaluation of the instructional
materials involves the advisement of each trainee by a role model apparel merchant
and by a panel of business experts. During the funding period the instructional
materials will be tested in an open entry-exit program and the results will be
evaluated by the participating teacher-coordinator, the adult trainees, and the
role model merchants. The panel of business experts will evaluate the effective-
ness of the instructional materials as evidenced by the entreprenurial competencies
exhibited by the adult trainees.

Based on these evaluations of the project, the instructional materials will
be revised. Recommendations will be made for the continued use of the revised
materials in open entry-exit programs aimed to provide entreprenurial competencies
which will facilitate self employment in apparel shops.

APPENDIX T

RESEARCH TEAM SCHEDULE OF ACTIVITIES

Activities	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
	Aug 76	Sept	Oct	Nov	Dec	Jan 77	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan 78
A. Staffing Research Project	A1 A2	A3								A2	A3							
B. Panel of Business Experts		B1				B2							B3		B4			
C. LP's		C1	C 2		C 3		C 4		C5	C6								
D. Testing						D1	D2	D3					D4		D 5			
E. Sights					E1			E2	E3	E4		E5			E 6			
F. Role Model Merchants							F 1				F2			F3				
G. Project Management											G1			G 2				
H. Evaluate Results																H1	H2	H3

Chart Code

A. Staffing Research Project
   1. Co-Directors - Greenwood
   2. Grad Assistants - Greenwood, Mott
   3. Payroll and Budget - Greenwood, Callsen and Mott

B. Panel of Business Experts
   1. Contact Panel present Research Project - Drs.
   2. Contact Panel as needed - GAS
   3. Final evaluation of entrepreneur plans of adult trainees - PBE
   4. Final evaluation of research project - Drs.

C. Instructional Material (LP's)
   1. Strategy for total Learning Package - RT
   2. Select competencies for four functional areas - RT, PBE
   3. Compile information for four functional areas - GAS, PBE
   4. Prepare Learning Packages for four functional areas - GAS
   5. Pretest Learning Packages - GAS
   6. Duplicate Learning Packages - GAS

D. Testing Instructional Material
   1. Select evaluation techniques - Drs.
   2. Develop instruments - RT
   3. Validate instrument - GAS
   4. Use of evaluation instruments - Drs., GAS
   5. Analyze data - Drs.

E. Sights
   1. Contact principal teacher-coordinator - Drs.
   2. Selection of Pilot Study school setting - Drs.
   3. Recruit adult trainees - Drs., T-C
   4. Prepare teacher-coordinators - GAS
   5. Use of LP's by adult trainees - T-C, AT
   6. Final evaluation of research by teacher-coordinator and
      adult trainees - RT

F. Role Model Merchants
   1. Contact role model merchants - Drs.
   2. Schedule role model merchants and adult trainee conference -
      T-C
   3. Final evaluation of research project - RT

G. Project Management During Pilot Study
   1. 1st on-sight visits - Drs., GAS
   2. 2nd on-sight visits - Drs., GAS

H. Evaluate Results of
   1. Results of evaluation instruments - Drs., GAS
   2. Recommendations - Drs., GAS, PBE
   3. Final Report - Drs.

Code: Drs. - Directors; GAS - Grad Assistants; RT - Research Team;
     PBE - Panel of Business Experts; T-C - Teacher-Coordinators;
     AT - Adult Trainees

VITA ⌐

JoAnne LeMay

Candidate for the Degree of

Master of Science

Thesis: DEVELOPMENT AND EVALUATION OF AN ADVERTISING AND
PROMOTIONAL LEARNING PACKAGE FOR TRAINING POTENTIAL
APPAREL SHOP ENTREPRENEURS

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1972-73; Neiman Marcus executive training, 1973. One of
four founders of Scripture Designs, Inc. (wholesale/retail
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Texas, 1974-75; Freelance illustration, 1968-present.