

Western Association of Food Chains (WAFC)

Core Competencies - Revalidation Event

Compiled by Cherie Phipps and Doug Fox in conjunction w/ Federal Grant "ACT-On Retail Management Careers"- February 2013

I. Competency Revalidation Event:

On Thursday, February 7th, 2013, a group of Industry Experts from 11 different retailers convened with WAFC and "ACT-On Retail Management Careers" Grant Partners to reassess and revalidate the WAFC's list of core competencies linked to success at the Store Manager level in the Retail Grocery Industry. The Industry Experts selected to attend were all in managerial roles, and 80% had also completed the Retail Management Certificate (RMC).

The objective of this event was to utilize industry experts and college professors who teach the courses, to ensure that today's RMC graduate is equipped with the knowledge, skills, and abilities needed for managerial success in the 21st century. The original list of core competencies, developed in the mid-1990s with an industrial psychologist, was analyzed item-by-item to determine contemporary relevance in the retail industry.

II. Summary of the Revalidation Event:

The event was facilitated by Janet Schnitz, Provost Emeritus of Western Governors University (WGU).

A. Introducing the WGU:

Western Governors University (WGU) began as a collaborative among several western states. WGU was chartered in 1996, incorporated as a private, nonprofit university in 1997, and began accepting students in 1999. Created to expand access to higher education through online, competency-based degree programs, WGU's mission has remained one of helping hardworking adults meet their educational goals and improve their career opportunities. To fulfill that mission, the founding governors also insisted that WGU be affordable, flexible, and student-focused. WGU makes maximum use of distance learning technologies and uses competencies, rather than seat time, as the measure of its outcomes.

B. Introducing Competency-Based Learning:

1. Janet described WGU as an online, accredited educational institution that allows students to work from home at any hour, studying and preparing for a variety of assessments that measure competency attainment.
2. WGU's approach defines the competencies and course outcomes desired, and allows students with previous skill, education, and/or background to accelerate their learning and earn their degree by passing the competency-based tests. Credit for past experiences is also incorporated.
3. WGU's philosophy and approach are relevant to the WAFC and the ACT-On Grant because they support our goal to help students with in-the-field grocery/retail experience earn the RMC more rapidly, by passing competency-based tests.

C. Questions Posed to our Expert Panel:

1. Is the RMC still important and relevant?

Overwhelming consensus from the panel was that the RMC program is still very relevant, needed, and provides greatly desired skills to potential managers. The RMC fosters personal growth, confidence, more industry-related knowledge, job satisfaction, and potential future promotions, raises, and bonuses, particularly for many who began in the grocery industry unaware of the possibility for future growth and a fulfilling career. Completion of the RMC puts people on a career path, gives them a competitive edge, and fills succession pipelines/talent pools.

2. What are the impediments (barriers) to the program?

A. Time: The students are often full-time, experienced employees with families, community responsibilities, and other activities that compete for time and attention.

B. Awareness: Industry employees are often unaware of the program, its facets, and how much potential the certificate has to further their career in the grocery/retail industry. They also don't know how much their superiors support the program. Thus, providing informative career/education path communication materials to potential students is critical.

3. What works to facilitate and encourage the program?

A. Financial Aid: The panel agreed that tuition reimbursement, pre-paid tuition, scholarships, and other forms of financial aid for the program are paramount in facilitating employees' participation.

B. College Credit: The panel agreed that transferrable college credit is a critical aspect of the program and should be emphasized as part of the recruitment effort. For the overwhelming majority of retail industry employees who lack college education, the RMC courses begin the education pathway toward future degrees (Associate, Bachelor's, etc.).

C. Professional Endorsements: It is also advantageous that the colleges and industry organizations, such as the WAFC, the FMI (Food Marketing Institute), NGA (National Grocers Assoc.), CGA (California Grocers Assoc.), and AFMA (Arizona Food Marketing Alliance), all endorse the program, giving the RMC more legitimacy, sector-wide value, and recognition.

4. *How could we adjust and improve the RMC to better prepare our graduates to work towards and potentially become Store Managers?*

A. Companies: Employers/Managers/CEOs need to take an active roll in expressing the existence and importance of the RMC to their employees. We need to emphasize and improve the relationship between the employees and their employer; we need to point out the vast career advancement opportunities for those who earn the certificate.

B. Colleges: Colleges need to make a concerted effort to build awareness for the RMC and communicate the valuable career opportunities in the retail grocery industry with their own students (who may have limited knowledge of the grocery/retail industry). Colleges can also communicate with the industry about model students, allowing supervisors to hear about a student's motivation, dedication, and progress in the program.

D. Review of Original Competency List:

1. Janet Schnitz, Provost Emeritus of WGU, guided the Industry Expert Panel through a review of the Original Core Competencies.

2. The expert panel determined that the role of a manager has become more sophisticated over the past 10 years, requiring more depth in certain areas, such as math related to business and finance, the ability to lead, and decisively problem solve.

3. To reflect these changes, the panel made substantial recommendations to improve the core competencies and related course outcomes. Below is a description supporting the detailed discussion around each of the original competencies:

Writing Skills- Change core competency of Writing Skills to Business Writing, for consistency and industry relevance.

Math- Recommend combining Basic Mathematics competency and Budgeting, to include "applied business math," such as profit and loss statements, financial math, percentages, ratios, decimals, fractions, business-related conversions between them, gross to net profits, increase/decrease in sales, and ability to create, meet, and adjust budgets. The recurring theme was that managers need to apply these skills in the field to think on their feet and solve real-world problems. This discussion led to a strong recommendation that the Business Mathematics and Accounting/Bookkeeping classes be combined into one higher-level course on "Financial Management".

Decision Making- Consolidate Learning/Applying Knowledge and Decision Making into one competency.

Work Ethic- Change Work Ethic to Business Ethics, emphasizing the aspect of enforcing company policies and procedures in an ethical way- not simply following them.

Adaptability- Remove "accepting criticism" (more relevant to Interpersonal Skills) and focus on "ability to prioritize."

Teamwork- Include emphasis on not only contributing to a team, but on a manager's ability to facilitate the achievement of goals for a team.

Oral Communication- Consensus was that oral communication is a required managerial skill, and that it should include speaking to a variety of types and sizes of diverse audiences. *NOTE: The panel recommended (with the colleges' support) combining the Oral and Written Communication classes into one comprehensive, semester length class, such as Business Communication Skills for Managers. This class should include, among other skills, how to communicate orally and in writing with clarity, follow and give directions, and present to others confidently.

Interpersonal Skills- Emphasize the abilities to accept and deliver constructive feedback in a professional manner.

Inventory Control- The panel recommended changing Inventory Control to Inventory Management and expanding the competency to include an understanding of the flow of goods and services, as well as the ability to recognize causes and effects of supply chain issues.

Front End Management- Recommend eliminating this as a core competency, as it is really a subset of a more comprehensive competency around Customer Service that incorporates maximizing the entire consumer experience.

Budget- Eliminated and embedded in new "Financial Management" competency, focusing on calculating, interpreting, and analyzing financial information to make business decisions.

Cash Handling- Cash Handling eliminated, as it is what they train entry-level employees to do.

NEW Competency- LEADERSHIP- The panel views "being an effective leader" as critical, focusing on motivating, influencing, and supporting others to achieve desired outcomes.

NEW Competency- TECHNOLOGY- The expert panel emphasized that, even though today's younger employees may be computer literate, they need a working knowledge of business application software.

III. Subsequent Actions, February 8- March 1, 2013:

The WAFC desires to endorse a *program of study that provides a structured, credit-bearing education pathway linked to competencies considered crucial determinants of career achievement in the retail industry*. The activities that took place in February 2013 have generated the following deliverables critical to the WAFC and the college partners:

A. WAFC's Retail Store Manager Core Competency List- Revalidated 2013:

After reviewing and analyzing the expert panel's recommendations, a new list of "Core Competencies for Success at the Store Manager Level" was established. Then, on February 8th, this updated Competency List was submitted to the expert panel to ensure an accurate understanding of their recommendations. (See page 4 and 5 for the *Original List* and the *Updated 2013 List*, respectively.)

B. Revised Course List for Retail Management Certificate, and Recommended Course Sequence:

Following an examination of the competencies, the expert panel's insight and experience (both as students and managers) led to a "backward look" at the courses, course outcomes, and potential for organizing the courses in a particular order. Ultimately, the panel recommended TWO changes: (1) Combine the communication competencies into one course; (2) Incorporate the mathematical/accounting competencies into a higher level "Financial Management/Budgeting" course. Below is the **revised list of generic course titles and recommended course order**:

1. Human Relations/Organizational Behavior
2. Computer Applications for Business (Technology)
3. Business Communication Skills for Managers (Combines Oral, Written, and Presentation skills)
4. Introduction to Management
5. Introduction to Marketing
6. Human Resources Management
7. Financial Management/Budgeting (Incorporating relevant Business Mathematics and Accounting principles)
8. Retail Management (Ideally a Capstone Course)

C. Revised Competency-Based Course Outcomes:

Throughout the month of February 2013 and the next several months, WGU (Janet Schnitz) continued to guide the "Act-On Retail Management Careers" consortium through a detailed process to "operationalize" the new competencies.

The first step was the detailed review of the original course outcomes for each of the 10 Retail Management Certificate (RMC) courses. The next step was to map the new competencies back to course outcomes.

The third step involved a detailed process to establish a revised set of course outcomes for the WAFC-endorsed Retail Management Certificate. During the process, the group utilized "Bloom's Taxonomy for Learning, Teaching, and Assessing," as well as the "Backward Design Model," to do the following:

- (a) Identify desired results: What will students know, understand, and be able to do?
- (b) Determine acceptable levels of evidence: How will students know when they have reached the desired goals?
- (c) Design activities that will generate desired results.

D. Next Steps Supported by WGU and ACT-On Grant Partner Colleges during 2013/14/15:

1. WGU to review course/learning outcomes to ensure articulation matching with WGU (*completed*)
2. Provide direction to Subject Matter experts on appropriate content/sizing of competency-based modules (*completed*)
3. Provide counsel during development of learning experiences and instruction that prepare students for assessments (*in process*)
4. Provide counsel during development of assessments appropriate to the re-validated WAFC competency list (*in process*)
5. ACT-On consortium colleges to develop "best-in-class" version of RMC courses and materials; make available to all WAFC-approved partner colleges via an open source platform (OER) by end of year, 2015

FINAL NOTE FOR COLLEGES: All Retail Management Certificate Partner Colleges are asked to utilize the Curriculum Crosswalk Form and make adjustments to their Certificate to comply with the Expert panel Recommendations by June 2016.

Original Cumulative Competency List (circa 1997) – Retail
Store Manager/Assistant Manager/Front End Managers (PICs)/Department Managers

Business reading

Ability to read and comprehend basic and technical business documents

Writing Skills

Ability to compose and create basic and technical business documents

Math

Ability to perform basic mathematical operations

Learning/Applying Knowledge

Ability to learn, identify, and apply information needed to perform job-related tasks

Decision Making

The ability to make sound decisions by logically interpreting and combining information, and to effectively identify and address specific problems

Work Ethic

Ability to follow company policy, procedures, and perform job duties in ethical/honest manner

Adaptability

Ability to adopt change, effectively handle stressful situations, and accept criticism

Task Completion

Ability to accurately complete jobs in a timely manner

Teamwork

Ability to positively contribute within a team structure

Oral Communication

Ability to communicate, follow oral instructions, and address problems with others positively

Interpersonal Skills

Ability to effectively and fairly guide, assist, monitor, and assess the performance of employees and provide insight on how to complete a task

Merchandising

Ability to promote products through innovative and effective merchandising techniques

Inventory Control

Ability to identify and recognize proper stock level conditions

Front End Management

Ability to enforce check-stand procedures, front end policies, and provide customer service

Budget

The ability to meet projected sales and labor budgets

Cash Handling

Ability to oversee proper deposit, cash handling, and check cashing procedures

*Provided by Cherie Phipps, WAFC
(Developed in the mid-1990s with "Competency Management Incorporated," Grosse Pointe Farms, MI 48236)*

WAFC - Retail Store Manager Core Competency List - 2013
Store Manager Level

1) Business Reading

Ability to read and comprehend basic and technical business documents

2) Business Writing

Ability to compose basic and technical business documents

3) Decision Making

Ability to identify and apply relevant information needed to set goals, perform job-related tasks, and make business decisions

4) Business Ethics

Ability to follow and enforce company policies, procedures, and perform job duties in an ethical manner

5) Adaptability

Ability to adopt and lead change, refocus and prioritize actions in the business environment

6) Task Completion

Ability to prioritize and manage time to complete tasks within established deadlines

7) Teamwork

Ability to collaborate and cooperate within a team structure and facilitate achievement of shared goals

8) Oral Communication

Ability to interpret oral instructions and communicate to a variety of diverse audiences

9) Interpersonal Skills

Ability to interact with business contacts in a professional manner while accepting and delivering constructive feedback

10) Merchandising

Ability to promote products and services through techniques that lead to increased sales

11) Inventory Management

Ability to explain the flow of goods and services in a retail environment and recognize the cause and effect of issues in the supply chain

12) Customer Service

Ability to provide activities and behaviors that maximize all aspects of the consumer experience

13) Financial Management

Ability to apply math skills to calculate, interpret, and analyze financial information to make business decisions

14) Leadership

Ability to motivate, influence, and support others to achieve desired outcomes

15) Technology

Ability to utilize relevant technology-based business applications

Validated in 2013 through a collaborative effort led by WGU (Western Governors University), involving Retail Industry Experts, WAFC, and the "ACT-On Retail Management Careers" Grant Consortium

Re-validated in 2014 through a collaborative effort involving additional retailers, convened by WAFC and FMI.