



Testing and Implementing EQF-Principles in Trade Organizations and Education

Final Report
for Work package 4
“Reachearching trade qualifications and
training from an educational point of view”



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Education and Culture DG

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Colophon

Testing and Implementing EQF-Principles in Trade Organizations and Education

Final report for Work package 4:

"Researching trade qualifications and training from an educational point of view."

The final report has been developed by:

Kenniscentrum Handel (KCH), The Netherlands

The final report for Work Package : "Researching trade qualifications and training from an educational point of view." contains an overview of the methods used and the results of the first phase of the European Project "TIPTOE" supported under the Leonardo da Vinci "Transfer of Innovation" programme 2007 - 2013 of the European Commission.

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Managing editor & design:

P. van den Bosch, EVTA (BE)

Technical editing:

J.Jansen, KCH (NL)
G.Karsdorp, KCH (NL)

Coordinator:

R. van Wezel, KCH (NL)

Production:

European Vocational Training
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1 Introduction

This document contains the final report for the TIPTOE-Work Package : Researching trade qualifications and training of an educational point of view.

The main goal was to identify KSC delivered in programmes by educators across Europe for the development of retail skills for the 4 identified occupations as described in WP 2:

- Shop assistant;
- Shop manager;
- Logistics assistant;
- Logistics manager.

This workpackage will establish the viewpoint for all stakeholders and participants in the vocational training field. Positives and negatives. Ultimately the KSC items delivered by educators will be compared to the EQF and the KSC items identified by employers. In this way the gaps and interpretation differences between the educational field and the labour market can be defined.

Main activities of work package 4:

- WP 4.1 Desk research educational qualifications and/or programmes for the trade sector;
- WP 4.2. Interview research educational institutions;
- WP 4.3. KSC-analysis of educational qualifications and/or programmes for the trade sector;
- WP4.4. Survey of educational institutions into KSC-learning outcomes;
- WP 4.5. Research report;

Partners involved

WP4 is coordinated by P3: EDEXCEL, UK

The other partners involved are:

- KCH (NL): Centre of expertise for vocational training and labour market in the trade sector;
- QA (LT): Qualification Authority under the Government of Lithuania;
- EDEXCEL (UK): Provider of internationally recognized qualifications;
- CECOIA (PT) Vocational training centre for the trade sector;
- AGEFA PME (FR) Provider of training and work placements for SMEs;
- CPI (SI) National institute for vocation education and training;
- CPV (IT) Veneto productivity centre;

This means WP4 of the TIPTOE-project will yield the results of trade qualifications/ training programmes from 8 different countries: France, Germany, Italy, Lithuania, the Netherlands, Portugal, Slovenia and the United Kingdom.

Agreements made by the project partners:

- In WP 4 the TIPTOE project will concentrate on the formal educational offer related to the 4 occupations in the trade sector described in WP 2. These are:
 - Retail:
 - Shop assistant / Sales associate / Sales person / Sales assistant
 - Shop manager
 - Wholesale:
 - Logistics assistant / Stock clerk / Warehouse assistant
 - Logistics supervisor / Warehouse manager
- Each partner will identify the main qualifications for the 4 occupations, including the level of qualifications, broad competences and KSC-items;

- The desk research will focus in national (or regional) VET-systems and VET-offers in formal learning and will include identification of the structure of vocational education (including schools, further educations and higher education);
- The minimum number of interviews required is 3, divided between schools, colleges, company training providers, education boards and universities. This means that each partner involved will deliver 3 or more interview transcriptions;
- The formal educational offer related to the 4 occupations will be analyzed and described in KSC-items;
- Non-formal and informal learning will be described as example (Good Practice). The non-formal and informal learning will not be analyzed and described in KSC-items within the scope of this project;
- For the final profile the KSC-format (following EQF-principles) will be used. This format is agreed upon in the second meeting. The format is attached as Annex 3.
NB. The final column (EQF-level) doesn't have to be filled out yet. This has to be done, after the profile has been approved upon, e.g. in WP5. (This column has already been left out in the Annex).
- The profile format is designed to assign KSC to the formal educational offer.

Expected results of WP4

The essential of WP4 is to provide input for WP6, so that we will be able to compare the occupational and educational profiles. The main result of WP4 should be the description on the formal educational offer related to the 4 occupations in the trade sector, for each of the partner countries, described in KSC-profiles integrated in retail qualification programmes.

Since the complete package of results of all the results of Work package 4 is so massive, that it would lead to a very voluminous report, we felt obligated to confine this report to the essential findings only. For the complete package of all the detailed results (e.g. the national profiles), we refer to the TIPTOE website, www.eqfcommerce.eu, on which all documents are posted.

2 Working methods of WP4

In order to facilitate the partners and ensure that the Work Package leads to comparable results, e.g. occupational profiles for the trade sector, working methods have been developed by the leader of the Work Package, EDEXCEL (UK), in close cooperation with the project coordinator KCH, and presented to the partnership in a working guideline document. Because this Work package is very similar in terms of activities compared to WP 2, the guideline has been delivered at once to the partners for implementation.

2.1 Activity 1: Desk research

In WP2 KSC profiles have been developed for 4 occupations

Retail:

- Shop assistant / Sales associate / Sales person / Sales assistant
- Shop manager

Wholesale:

- Logistics assistant / Stock clerk / Warehouse assistant
- Logistics supervisor / Warehouse manager

In WP4.1 we have focused ourselves on the formal educational and training system regarding the 4 mentioned educations. The analysis were made through desk research or, when necessary, completed by interviews (activity 2).

The key question, which should be answered by the desk research was the following:

“As a result of WP2, an occupational profile of ...*[occupation]*... is described in terms of Knowledge, Skills and Competences (KSC). Which corresponding educational and training programmes/ qualifications does your country offer to the student?”

Methods used

We started with the collecting of information about education and training program regarding the 4 occupational profiles developed in WP 2. The desk research consisted of:

1. Presentation of the education and training system (provide a general description, including a graphical representation, facts and figures, and information on possible reforms, etc.)
2. For each occupation, a description of the education and training programmes in terms of:
 - Duration;
 - Course structure;
 - Course design and planning;
 - Number of locations;
 - Number of students;
 - Teaching material;
 - Examination;
 - EQF-level.

Every partner made use of their own network and information systems for gathering information.

The data from the desk research where the starting point of the interviews. The analysis of these information source gave us a raw impression of the offered education and training programme of each country. But for more detailed information we needed to conduct interviews.

2.2 Activity 2: Interviews with educational providers

To get a nearly complete picture of the four investigated qualifications/ training and the formal educational programmes corresponding to the four occupations, we have done 3 interviews, divided between schools, colleges, company training providers educational boards and university. The description of the formal qualifications/ training and educational programmes are identified. The interviews with the educational providers have contributed to answering the following questions.:

- Are the descriptions of the formal educational and training system and programmes complete and adequate?
- Do these descriptions cover the KSC-descriptions of occupations (resulting from WP2)?
- Do the interviewed educators use national qualifications and if yes, are they validated formally?
- What is the offer of non-formal/informal learning for these occupations and how do these relate to the formal educational offer?
- Are there any good practices in the field of non-formal/informal learning?

Which institutions or persons have we asked?

We tried to ask the best informed persons divided between schools, colleges, company training providers educational boards and university.

Finally, it depended on the respective partner to choose the right questions within the interviews. The information of activity 1 forms the basis for the interview formats.

2.3 Activity 3: Construction of the educational profiles using KSC

For the construction of the profiles we have integrated the answers we have got from the interviews into the KSC-format. For each educational qualification and/or programme every partner filled out one KSC-format

Way of working to construct draft profiles

To construct the draft profiles we used the results of the desk research and interviews and translated them in the EQF-format (in terms of KSC-items).

As a basic for the KSC-format we structured the profile in “Core Tasks”. It was important to translate the structure of the educational qualification and/or programme in this structure of “Core Tasks”, because then the KSC-items can be identified. The maximum number of Core Tasks to be defined was 10 (including management, languages, etc.)

To construct the draft profiles we used a format template with all subtask assigned to the respective Knowledge, Skills and Competences-items which each educational programme provides. We have copied the items separately from the interview-notes into the format.

In addition, each partner describes the non-formal/informal learning (max 1 page), supplementary a Good Practice of non-formal/informal learning (e.g. company training).

2.4 Activity 4: Survey of educational outputs into KSC

To get an agreement of the draft KSC-education a survey was carry out among minimally 6 interviewees and stakeholders. The outcomes led to a survey with the results of the comparison to KSC-coverage between formal education and training programmes and KSC identified by the labour market.

Points of focus in the survey were:

- The evaluation of the range of training and qualification programs as a contribution to LLL;
- The evaluation of the KSC coverage in the educational programmes compared to the KSC coverage in the occupational profiles;
- The evaluation of the gaps between the KSC defined by the labour market and educational field;
- The evaluation of progression routes;
- The fit for purpose;
- The future perspectives and plans: new programmes.

The Scoring method

The basis of the survey was the profile each partner has constructed. Thus, each item of the profile was being questioned for importance. The questioned persons should indicate the level of coverages (on a 4-point scale) for each item with respect to the profile at hand.

Conclusion:

The people who are contacted by e-mail were asked if they wanted to complete the survey. Unfortunately we have received very little response. Probably this has to do with the fact that the respondents do not have a good view on the occupations.

To still analyse the coverage of the profile we designed a questionnaire which the partners have used in WP 6 to compare both profiles. So for the conclusion of this activity, we refer to the final report of WP 6.

3 Results

The four activities described in Chapter 2 yielded the following results:

- a general overview of national and regional VET system per project country.
- Good practice of non-formal learning per project country
- educational profiles in KSC-format for the four selected trade occupations from each partner country

3.1 General overview of national and regional VET systems

Every country has its own educational (VET) system. There is little similarity between the systems. Although it seems that in most countries the business world has a big impact on the system. Some countries have a close co-operation with employees or have tried to structure the system more in line with the business world. But for an overview we refer to the separate reports of each country you can find on the TIPTOE website: www.eqfcommerce.eu

3.2 Good practices of non-formal learning per project country

The results from desk research and the interviews of WP 2 show that the trade sector covers a wide range of occupations, for which even more different job titles are used. In this WP the partners have all found a formal educational program which corresponds with the job title, those previously mentioned. But of course there are also a lot of non-formal or informal learning examples related to the occupational profiles. But because these are often poorly structured and difficult to see, the partners described one good practice of non-formal or informal learning related to one of the occupational profiles. For the description of the good practices we refer to the TIPTOE website: www.eqfcommerce.eu

3.3 Educational profiles in KSC formats

The results of the desk research were validated by interviews with educational providers. After that the results can be translated into the EQF format. Now all programmes were described in terms of knowledge, skills and competences.

For the KSC formats we refer to the TIPTOE website: www.eqfcommerce.eu

Shop Assistant (Table 1a)

For the Shop Assistant, all profiles have tasks concerning receiving and stocking merchandise/goods and selling, communicating with customers and providing services. Most of the profiles describe tasks about cashiering, displaying the merchandise and maintaining of the shop. Some profiles have tasks concerning working on complaints, preparing sale, handling documents and reporting.

Shop Manager (Table 1b)

All profiles of the Shop Manager describe tasks concerning management of the staff and activities on sales, receiving merchandise, etc.: directing, controlling, leading, managing and supervising. Other tasks in the profiles of the Shop Manager are implementing business policy, marketing measures and HR-policy, administration tasks and improving sales promotion. The described tasks in the profiles show a greater diversity than the tasks of the Shop Assistant.

Logistics Assistant (Table 1c)

Receiving goods, storing goods and controlling stock/inventory, picking orders and shipping goods were tasks in almost all profiles. Some profiles describe tasks concerning registration and packing of goods. Some profiles name explicitly the cleaning of the warehouse,

assisting in the management of warehouse functions and controlling of the quality and quantity of work in accordance with standards and other prescribed regulations.

Logistics Manager (Table 1d)

The tasks described in the profiles of the Logistics Manager are about supervising, controlling, organizing and managing of the activities in the warehouse. There are no tasks described concerning the primary processes in the warehouse. Other tasks in some profiles are: implementing business policy, developing customer relations, sales, product management and developing logistical concepts.

Table 2 contains an overview of the EQF-levels that were allocated by the partners to each profile, and Table 6 lists the validating organizations for each partner and sector.

Table 1a: Overview core tasks Shop Assistant

KCH (P0-NL)	BZSH (P2-DE)	QA (P3-LT)	EDEXCEL (P3-UK)	CECOA (P4-PT)	AGEFA PME (P5-FR)	CPI (P6-SI)	CPV (P7-IT)
Receives and processes goods	Accepts goods and stores delivery	Workplace preparation	Customer service	Control stocks	participates to Business development	Monitors stock	To assist the customers
	Communication with customers	Reception and storage of goods	Sales	Receive and pack the suppliers products	processes goods and contributes to Work environment management	Receives goods	To manage internal and external relations
Sells and provides service	Organizing the Checking out process	Servicing of buyers	Display/ merchandising	Applies expositions techniques and replacements of products at the point of sales	completes sales transactions	Prepares the goods for sale	To manage the store
Concludes sales transactions	Works on complaints	Selling of goods	Health and safety	Applies service to customers and sales technique at the point of sales		Sells goods and trade services in compliance with the trade standards	To manage receipts and payments
Dutch language	Controls stock; takes inventory; pays attention to order and cleanness	Accounting of the assets	Reporting	Applies techniques of telephone assistance to customers		Conducts cashiering	Managing records
Foreign language	Prepares goods for the sale, carries out pricing			Applies customers loyalty procedures		Participates in the carrying out the inventory of the goods	Post-sale managing
Leren Loopbaan en Burgerschap				Implements procedures for after sales services		Maintains equipment, work machinery, tools, facilities..	
Arithmetic and math				Handle costumers complains in		Communicates	

				accordance with the procedures		with buyers, suppliers and co-workers	
				Fills in commercial documentation			

Table 1b: Overview core tasks Shop Manager

KCH (P0-NL)	BZSH (P2-DE)	QA (P3-LT)	EDEXCEL (P3-UK)	CECOA (P4-PT)	AGEFA PME (P5-FR)	CPI (P6-SI)	CPV (P7-IT)
Implements and monitors company business policy	Advising and informing customers	Planning of the activities of trade enterprise (or department)	Sales control	Applies marketing techniques	Supervisor commercial team management	Organizes work	To organise the activities of a commercial office
Directs and monitors goods processing and stock control	Marketing measures plan and carrying out	Management of activities of the trade enterprise or its department.	Coordination and leadership of the staff	Applies advertising and promotion techniques	Manages a Business unit	Controls stock	To communicate and promote products, services and events
Directs sales activities	Leading and teaching staff, Manpower planning	Coordination and control of activities of trade enterprise or its department	Merchandise control	Applies exposition and replacement and products techniques at the point of sale	Manages Business projects	Monitors operation of the store	To use the strategic and operational marketing techniques
Directs cash register activities	business control		Operational running of the shop	Applies stock control techniques	Manages customer relationships	Monitors the carrying out of the inventory of the goods	To use Business English
Dutch language	Carries out stock control and makes inventory		Customer service	Orders, receive and stock the suppliers products	Manages Service/Product offer	Plans and implements marketing activities	
Foreign language	Orders goods and checks goods quality			Applies English language vocabulary to the preparation of orders and receipt of products	Seeks information and uses it for commercial purposes	Implements modern ways of electronic commerce	
Leren Loopbaan en Burgerschap				Applies assistance and sales techniques at the point of sale			
Arithmetic and math				Applies phone assistance			

				techniques			
				Applies procedures for customer's loyalty			
				Applies procedures for the after-sales service			
				Deals with customers' complaints in accordance with established procedures			
				Treats, fills in and stores the commercial documentation			

Table 1c: Overview core tasks Logistics Assistant

KCH (P0-NL)	BZSH (P2-DE)	QA (P3-LT)	EDEXCEL (P3-UK)	CECOA (P4-PT)	AGEFA PME (P5-FR)	CPI (P6-SI)	CPV (P7-IT)
Receives goods and store goods	Acceptance of goods	Working with orders	Customer service	Carries out the operations related to the entrance of merchandise into the warehouse	processes the incoming flow of goods	Receives the goods	To manage inventory
Picks orders and makes goods ready for shipping	Storage of goods and cooperation with other areas	Storage of goods	Stock control	Carries out the handling and packaging of goods in the warehouse and ensure its maintenance and conservation	processes the outgoing flow of goods	Stores the goods	To monitor the storage of goods)
Dutch language	Picking and packing of goods	Transporting of goods inside of country and in the	General shop control	Carries out the dispatch of goods	organizes incoming and outgoing flows	Prepares and dispatches the goods	To process the warehouse data

		international routes.					
Foreign language	Shipment of goods	Preparation of documents		Participates in the preparation of inventories, running activities related to identification and control of goods and materials. Expedites merchandise	operates and improves stock control	Storages inadequate, dismissed and returned goods	To handle the goods packaging and shipment
Leren Loopbaan en Burgerschap	Transporting goods within the store (rearrangements), Using store typical means of work				operates safely forklift trucks (Category 1, 3 and 5)	Carries out inventory checks	
Arithmetic and math	Inventory control, goods control and quality securing measures				establishes contacts with partners	Keeps records of goods	
						Maintains the working equipment and machinery	
						Keeps the storage facilities and the surroundings in order	
						Communicates with the superiors, co-workers and clients	

Table 1d: Overview core tasks Logistics Manager

KCH (P0-NL)	BZSH (P2-DE)	QA (P3-LT)	EDEXCEL (P3-UK)	CECOA P4-PT)	AGEFA PME (P5-FR)	CPI (P6-SI)	CPV (P7-IT)
Implements and monitors warehouse business policy	Plans and realises the store exploitation	Organisation of the logistic business and information management	Customer service	Analyzes the company's logistic need, taking into account the evolution of the activity in order to implement logistic solutions best suited to the objectives, strategies and resources of the company	Assessing the feasibility of transport and logistic operations	Organizes work in the storage and optimizes human resources	To use and manage the main levers of marketing and customer care
Implements and monitors staff policy	Using team and project management, plans and uses staff	Regulation of orders.	Sales	Schedules and prepares the distribution to customers and the supply of production based on criteria that optimize the flow of services, raw materials and finished products, using integrated information systems	Organising and conducting transport operations	Manages, supervises and evaluates the work process	To apply the legislation on transport
Supervises and facilitates the logistic process	Tour planning	Management of the warehouse functioning.	Product management	Guides the activities of reception, control, handling, storage and dispatch of goods and materials	Monitoring transport and logistics operations	Ensures maximum use of the storage capacities and machinery	To apply the safety and quality regulations in the field of logistics

Maintains commercially activities	Finds out stock ratios and evaluates them; uses the controlling and quality management	Management of the technologic process of transporting of logistics product	Stock management control	Coordinates and supervises the team work under his/her responsibility, promoting and controlling the quality performance and ensuring the respect for standards related to quality, hygiene, safety and environment and labour relationships	Evaluating transport and logistics operations	Supervises the inventory checks and other agreed work standards	To plan logistics costs and methods
Dutch language	Develops logistical concepts on the basis of strategic analyses; optimizes logistical processes		Quality management	Supports assistance to customers, providing the necessary information and tailoring logistics services to customer needs	Managing service relationships	Supervises quality and quantity checks of the stored goods	To use the logistics and Supply Chain management techniques
Foreign language	Controls and makes arrangements of the purchase		Staff management	Collaborates in the management of stocks, according to the objectives established, taking into account the costs involved and the level of customer	Using information systems and managing fysical resources.	Keeps records	To carry out the logistics cycle monitoring using the ICTs

				assistance			
Leren Loopbaan en Burgerschap				Monitors the implementation of quality, environment, safety and hygiene procedures in the logistics system, particularly concerning, on one hand, the protection of products and goods against theft, damage and deterioration and , on the other hand, conditions relating to the warehouse environmental	Team management	Maintains the working equipment and machinery	To manage the customers relations also using technical English
Arithmetic and math				Prepare reports of their activities, organizing and systematizing the technical information concerning their area of intervention		Communicates with management, workers and clients	

Table 2: EQF-levels per profile allocated by the partners

Partner	Shop Assistant	Shop Manager	Logistics Assistant	Logistics Manager
KCH (P0-NL)	2	4	3	4
BZSH (P2-DE)	3	4	3	4
QA (P3-LT)	3	6	3	6
EDEXCEL (P3-UK)	3	4	6	-
CECOA (P4-PT)	3	4	3	4
AGEFA PME (P5-FR)	3	5	3	5
CPI (P6-SI)	3	4	4	5
CPV (P7-IT)	2	4	2	4

4 Conclusions

The profiles forms the basis for WP 6. In this WP we do a comparison of the occupational profiles as compared to the educational profiles. The general descriptions of the VET systems showed that the businessworld has a great influence on the structure or the development of qualifications. This increase the expactation that the the levels of both profiles are largely equal when it comes on the levels of the profiles.

To conclue this WP: we will translate the KSC profiles of both occupational and educational into a conclusion of the comparisation in WP 6.

interpretations are also reflected in the EQF map as a result of WP 5.

