

**Promoting and Encouraging  
Training in the Canadian Food  
Retail / Wholesale Industry**

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# Promoting and Encouraging Training in the Canadian Food Retail/Wholesale Industry

## **I. Background and Purpose**

The report, "*Creating the Future, a Human Resources Study of the Canadian Food Retail and Wholesale Sector*", was released in the fall of 1998. It presented extensive analysis of the competitive issues facing the industry in Canada, and the implications for human resources development and training practices in the industry, over the next 3 to 5 years. The report made 17 recommendations for actions which could be taken by various industry stakeholders, alone or in combination, to address these issues. Stakeholder groups included industry associations, firms, unions, governments, and educational institutions and training providers.

Following release of the report, a Transition Committee was established to guide the development of further activity which could lead up to, and provide the basis for, the creation of a Permanent Standing Advisory Board.

The Transition Committee has concluded that firms in the industry must adopt a training 'culture' and overcome their traditional reluctance to train their employees. Unions, too, must be encouraged to participate in, support, and even initiate, innovative training approaches. Promoting this training culture could be the focus for the initial activities of the Permanent Standing Advisory Board.

The Committee noted as a starting point, that further focussed research was needed to gather persuasive and compelling evidence on the benefits and best practices of training, which can be put before firms and unions in the industry. The Committee noted in particular the need for research on the following two questions:

- (i) What compelling reasons can be identified for employee training in the Canadian Food Retail and Wholesale sector, which would provide firms in the industry with a persuasive business-based argument for training and development? What evidence exists of positive business impacts flowing from training?
- (ii) What relevant training models can be identified that address training issues similar to those of the Canadian Food Retail and Wholesale Industry, which would provide examples of innovative approaches to training and development issues for the industry?

Together, these pieces of research, persuasively presented, would provide the Permanent Advisory Board with the basis on which to begin its role as a training and human resource development champion in the industry. They would provide evidence with which it could actively approach firms and unions in the industry to promote employee training.

The results of the research on the 'compelling reasons' and business benefits from training is presented in a companion document titled '*Training, the Bottom Line, and the Food Retail/Wholesale Sector*'.

A summary of the results of the research on training models is presented below. Individual training models are described in more detail in a separate companion document entitled '*Case Studies in Innovative Training Practices for the Canadian Food Retail/Wholesale Industry*'.

## **II. Overview of the Training Models**

The research has summarized and described 25 different training-related models. These have been chosen to reflect a wide variety of approaches which address a range of training issues relevant to the Canadian food Retail/Wholesale industry. These issues reflect the different dimensions of training which confront the industry, which include:

- types of employees being trained (e.g. management, clerks, cashiers, etc.);
- types of skills being provided (e.g. technical skills, management skills, literacy, people skills, etc.);
- types of training delivery technology (e.g. traditional, computer-based, distance education, etc.);
- focus of the training effort (e.g. firm level, union level, sector level, etc.);
- training partners (firms, unions, educational institutions, in varying combinations).

Most of the examples cited cover more than one of the above dimensions.

Different readers will be interested in different training dimensions, so some cases will be of more interest to some readers than others. The report is organized in an effort to facilitate readers' 'navigation' through the cases to find the ones of most interest.

The discussion in this section is organized according to the type of organization involved, as follows:

1. Company Approaches in Food Retail and Retail
2. Canadian Sectoral Approaches to Training Issues
3. American Joint Labour-Management Approaches to Training Issues
4. Union-Led Practices
5. Educational Practices

For each organization type, the narrative draws together and summarizes some common themes. A table at the end of the report presents the individual models in visual form according to the various training dimensions covered by each. As noted above, individual case study descriptions are presented in a companion document, *Case Studies in Innovative Training Practices for the Canadian Food Retail/Wholesale Industry*'.

## 1. Company Approaches in Food Retail and Retail

The research explored the training approaches of *smaller food retail independents* and *larger retail and food retail/wholesale chains*, both in Canada and the United States.

The specific companies covered were:

### *Small/Independents/small chains*

- **Company A**, Southern Ontario; (10 stores)
- **Company B**, British Columbia; (3 stores)
- **Company C**, Eastern Ontario; (5 stores)
- **D&W Food Centers Inc**, Grand Rapids, Michigan. (25 stores)

### *Larger Retail or Food Retail and Wholesale Chains*

- **SUPERVALU University**, Minneapolis, Minnesota;
- J.C.Penney Company, Plano, Texas;
- Company D<sup>1</sup>, Canada
- Company E<sup>2</sup> (USA)

#### (1) *Independents/small chains*

The four small firms are very different in a number of respects, including relative size and location. Nevertheless, a number of characteristics were common to all or most of these firms. Taken together, these characteristics paint a picture of firms with a clear business sense and an understanding of the contributions which human resources and training strategies can bring to the attainment of their business goals. The strong commitment to training which has resulted constitutes a natural outgrowth of these broader business strategies. These characteristics, together with a brief commentary on each, are as follows:

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<sup>1</sup> The Company asked that its name not be used.

<sup>2</sup> The Company asked that its name not be used.

(a) *Focus on Customer Service and Product Knowledge*

In several of the firms discussed, the business begins with a 'culture' of customer service which in turn reflects the 'family' nature of the company. The stress on customer service links directly to the importance of product knowledge and to the value of having employees able to advise customers on preparation of different products. It follows that most of these firms place a high value on 'people skills' and personal characteristics when they recruit, recognizing, as one of them put it, that 'today's recruits are tomorrow's managers'. These characteristics were particularly apparent in the cases of **Company A** and **Company C**.

Other important aspects of customer service related to the employee's authority to make service-related decisions on the spot to deal with specific situations. Firms such as **Company B** and **Company A**, in particular, recognized the value of preparing and equipping employees to take these decisions.

(b) *Strong Alignment between Values, Business and Human Resources Strategies, and Training Plans*

Common to most of these four firms was an explicit reference to 'values' as a basis of their operations. In several of the firms, particularly **D&W Food Centers**, these were reflected in formal business plans in which human resources strategies played an important role. Reducing turnover and its associated costs, for example, was seen as an important business strategy for several, and training played a part in this. This was particularly the case for **Company B** in a resort community, which had to deal with a highly transient labour force.

One firm (**D&W Food Centers**) explicitly linked turnover at the store level to a shortcoming in the leadership provided by the store management, and sought to address turnover through management training. In none of the firms did training simply sit by itself as a priority; rather, each firm regarded training as a critical means to achieving and supporting other aspects of its business strategy.

Several firms (**D&W Food Centers**, **Company A**) had well developed formal employee performance evaluation processes, in which employees were encouraged to identify the training they would need to reach certain employment and performance goals. Internal promotion was a feature of these firms, with promotion decisions reflecting performance evaluation, training taken, etc. For two of the firms, which were in the process of rapid expansion, the internal development and preparation of the necessary managers posed a major challenge for their training infrastructure. Where a firm recruited middle managers, it sought management skills first, adding grocery-specific skills later.

(c) *Strong involvement of management in delivering training*

For most of these firms, the majority of their training was developed in house, and a high proportion delivered by store or department managers. Several relied on 'train-the-trainer' methods.

In other respects, the mechanics of training differed among the firms. **Company C**, for example, has set up its own training centre because institutional courses are not seen as practical enough to meet its needs. **Company A** requires every new employee to take the Cornell University Home Study Course, *Fundamentals of the Food Industry*. **D&W Food Centers** also uses Cornell courses, and relies on local colleges to provide regional training sites for employees not located near the centralized sites. **Company B** makes use of the Canadian Federation of Independent Grocers video library, as well as Internet-based training.

(d) *Importance of 'soft' skills*

All four firms placed a high priority on skills related to leadership, communications, interpersonal skills, etc. This applied both to their management and to others in the store. The stress on these skills was particularly apparent in **D&W Food Centers** and **Company A**.

(2) *Larger Retail or Food Retail and Wholesale Chains*

The approaches of the large firms showed the greatest diversity, probably reflecting the diverse nature of the firms themselves. Of those examined, one (**J.C. Penney**) is a non-food retailer, one (**Company E**) is a very large food retailer with a number of large banner subsidiaries, one (**Company D**) is a medium-sized food retailer, and one (**SUPERVALU**) is a food wholesaler/retailer. While all four firms trained both their management and sales employees, these differences have in some measure shaped various aspects of their training approaches. Thus:

(a) *Issues of Training Consistency*

**J.C. Penney**, the non-food retailer operating under its own name, places a high value on consistency of training for its management and sales employees across its 1100 American stores. Issues of cost effectiveness and responsiveness are also important. The company has therefore introduced a training system that is completely distance education-based, using satellite transmission, CD-ROM and Intranet technologies in an integrated fashion.

Similarly, **Company D** has addressed the issue of training consistency, but has relied on more traditional 'train-the-trainer' approaches rather than technology-based methods.

At the other extreme, **SUPERVALU**, as a wholesaler, supplies a wide variety of stores, each with its own market positioning and identity. The company's training strategy focuses on supporting the retailers it supplies, on the reasoning that if they succeed, **SUPERVALU** succeeds. Because its retailers are so different, however, **SUPERVALU** concentrates on customizing generic courses to the particular needs of individual clients. It has developed a formal business assessment process for determining these needs, and for determining which problems are training problems and which are not.

Somewhat in the middle between these two extremes is **Company E**. As a holding company operating stores under five banners, this company recognizes that the specific training strategies of each banner firm must reflect and support that firm's business

strategy. In turn, the business strategies of the banner firms vary with their markets, competitors, and positioning. Thus, there will be important differences among the five training strategies. At the same time, however, there are opportunities for synergy and experience-sharing among the five banner firms, to find the firm with the best experience and raise the others' level of training to match it. Thus **Company E** is also concerned to a significant degree with issues of training consistency.

*(b) Issues of Training Delivery Technology*

Three of the four firms, to one extent or another, are exploring or using new training technologies in their effort to develop training on a cost-effective basis. Of the three, **J.C. Penney** has taken the most radical approach, completely scrapping its former traditional 'paper-based' and 'stand-up' training approach and replacing it with a fully integrated distance education methodology. **Company E** has continued to use a wide array of more and less traditional training approaches, reflecting the historical differences among its five banner firms. However, in all of its banner stores it has moved strongly to computer-based training to deliver cashier training. **SUPERVALU** still provides most of its courses on-site. However, each of its distribution centres is equipped with two-way video, which permits the delivery of interactive courses. The company is planning more here.

In contrast, **Company D** has been more cautious about adopting new training technologies, relying for the present on more traditional methods (train-the-trainer, supported by regionally-based training staff).

*(c) Issues of the Payback from Training*

Three firms had addressed the issue of the business payback to training, in a more formal way than the smaller independents. **SUPERVALU** noted its research on the impacts of its computer-based training, which indicated a very rapid payback to such training in terms of reduced error rates, reduced turnover, etc. **Company E** cited similar evaluations of its computer-based training for cashiers. It noted the greater speed with which the training was conducted compared to traditional methods, as well as the improved performance of CBT-trained cashiers compared to those trained more traditionally. Finally, **J.C. Penney** reported that they are able to track the sales performance of individual employees and compare that of training participants to that of non-participants. They find a high positive correlation between sales levels and training participation. **Company D**, significantly smaller than the other three, was closer to the small firms in that it had explored the business payback to training in a less formal manner.

In this regard, the larger firms' attitudes to employee turnover contrasted with those of the smaller independents cited above. Both **Company E** and **J.C. Penney** considered employee turnover a fact of retailing life, and appeared to place less emphasis on reducing turnover than on achieving other business objectives. This contrasts with the greater concern for turnover, and the great care taken in recruitment, reported among the smaller firms.

## 2. Canadian Sectoral Approaches

### *Canadian Business-Labour Approaches*

In Canada, about 25 **sectoral councils** have been established to address the human resources issues of individual sectors. A large number of these are joint labour/management organizations, and many also include governments and educational institutions. Facilitated greatly by the federal government, most were established in the late 1980's and early-to-mid 1990's. Many followed the completion of human resource studies similar to *Creating the Future*, the recent human resources study of the Food Retail/Wholesale Industry.

Not surprisingly, the sector councils' activities have varied, reflecting the differing realities and issues of their sectors. For example, while some have included both training and 'downside' adjustment activities (the latter to address the needs of individuals leaving the sector), others have focussed on developing occupational standards and generic industry-wide course curricula. Others in more technology-intensive sectors have developed Internet-based recruitment/placement tools for their members. In most cases, these various products were developed in order to generate revenue for the sector council, to help it become financially self-sufficient.

Unfortunately, some sector councils have also been disbanded, often due to their inability to become financially self-sufficient. When government funding vanished, so did industry interest. (In contrast to the American partnerships described later, collective bargaining and/or employer contributions were not, for most sector councils, the main source of revenue.)

A more recent complicating factor has been the federal government's decision in 1998 to 'devolve' responsibility for labour market programs to the provinces. As a result, the federal government was no longer permitted to pay direct training delivery costs incurred by sector councils. Thus, while the federal government maintains some responsibility for facilitating the development of sector partnerships, the sector councils must now approach the provinces individually for core training dollars. The extent of the impact of devolution on sector councils is only beginning to be felt.

The federal government nevertheless remains keenly interested in the potential for sector councils and has maintained its support for new and established initiatives. Though the funding question is crucial in the Canadian context, it is still important to examine some of the models that have been successful in bringing together labour and management together to develop joint sector-level approaches to human resource development.

Four different sector councils are described individually in the companion Case Study document. They are:

- The Canadian Steel Trade and Employment Congress (CSTEC),
- The Canadian Grocery Producers Council (CGPC),

- The Textiles Human Resources Council (THRC), and
- Canadian Tourism Human Resources Council Tourism Careers for Youth (Youth Internship Program).

All of these sector councils are joint labour-management partnerships, and each in addition has developed close working relations with community colleges and universities. Each has addressed training issues in a different way, taking into account the sector's particular needs. Taken together, they demonstrate the potential variety and effectiveness of joint sectoral approaches to training questions.

Of particular interest in this regard are sectoral approaches in such areas as:

- occupational/skill standards;
- training course development across the sector;
- workplace-level training tools;
- adjustment and career counselling measures;
- youth/management internships to attract new entrants into the industry.

The four sector councils, and key features of their approaches, are summarized as follows:

**1. The Canadian Steel Trade and Employment Congress (CSTEC)**, established in 1986, operates an innovative Worker Adjustment Program that provides a wide range of services and financial assistance to dislocated steelworkers.

In adjustment situations, CSTEC will send in a team composed of members sensitive to management and worker issues to interview those affected by the layoff and identify their training, counselling or other re-employment needs. For those who become unemployed, CSTEC will provide assistance in resume-writing, job search and ongoing support and counselling.

CSTEC has also developed a Skill Training Program which is now delivered in cooperation with 20 community colleges and cégeps. Offering a wide array of courses leading to a certificate in steelmaking, courses are taught at the workplace, in colleges, or in union halls. Certified college instructors work with union and management trainers, and industry needs are an important factor in the development of curriculum.

In this regard it is noteworthy that CSTEC and its community college partners have been able to develop generic courses across the steel industry despite the strong initial view of many companies that the majority of their training was proprietary rather than generic. The reduced cost to companies of offering generic training in some areas is seen to free up funds for proprietary training in others.

**2. The Canadian Grocery Producers Council (CGPC)** has focussed on developing training-related products and services for the sector, focussing on meeting the research, information and consultative training needs of the industry.

Today the CGPC's core services include:

- research – a 1997 overview of the industry and its training needs; a 1999 human resource update; and five case studies outlining tools to establish joint workplace training;
- a training guide series on needs analysis, joint workplace training committees, and training plan development, which will soon be available with a workshop series;
- advisory services, training needs analysis support and customized course development.

Though CGPC does not deliver training in a direct manner, it has partnered with "associate" training institutions to make available thirty courses in both general education and industry specific areas (i.e. pasteurization, pest control in the food industry, milk grading, smokehouse operation, dehydration, food packaging, food plant sanitation, and so on. These courses can be offered at the workplace and range from three hours to two days, making their delivery practical and affordable.

**The Textiles Human Resources Council (THRC)** has had particular success in developing occupational profiles in the sector, and in addressing its Management Development needs.

The Council has developed **occupational profiles** in a number of different job categories, including mechanics, textile dyers, and textile supervisors. Based on these profiles, the council has developed training programs. In co-operation with community colleges in Ontario, Quebec and North Carolina, the THRC is currently piloting a multi-module program to upgrade machine mechanics. Eventually, the intent is to develop courses such as this into a core curriculum and deliver it in a distance education format via computer-based training.

The **Textile Management Internship Program (TMIP)** has been developed to address an environment where the sector's management contingent is aging steadily. The initiative reflects a partnership with Mohawk College and McMaster University in Hamilton, together with the College of Textiles at North Carolina State University. Textiles suppliers, processors, and unions have also participated in the course development.

The program takes graduates of science or engineering programs, half of whom are women and all of whom are under 30, and provides them with training in textile science and manufacturing and business management. The program includes paid work placements.

The entire first year graduating class found jobs in the Textile industry.

**4.** The **Canadian Tourism Human Resources Council (CTHRC)** established one of the earliest and most successful youth programs, called **Tourism Careers for Youth**. Aware that the industry did not attract new entrants, due to the perception of low wages and poor working conditions, the program aimed at enhancing the industry's image and attracting youth to its numerous occupations. Since these features of the industry were similar to many of those attributed to Food Retail/Wholesale, the **Tourism Careers for Youth** program has relevance for Food Retail/Wholesale.

The **Tourism Careers for Youth** program combines basic level education with job related skills, as well as a work placement. The pre-employment and workplace training program is 90 hours, and includes such areas as service excellence; food safety and sanitation; first aid; job shadowing, and so on. Once the classroom portion is completed, participating employers will be expected to provide a further 90 hours of workplace training, with the goal of permanent employment in the sector.

The TCY program uses already developed materials to encourage high school students and graduates to enter the program. An industry volunteer makes presentations to grades 10-12, and high school career counselors are given materials. A new train the trainer program introduces the Council, its products and services and encourages employers to adopt national occupational standards. Following a two-day session, the industry trainers are able to deliver workplace programs.

Between 1996 and 1998, Phases I and II of the program were viewed as very successful. Of the participating youth, fully 70% completed the program (including the six month employment placement) and have either remain employed in the industry or have returned to school.

Phase III of the program, however, was negatively impacted when the federal government devolved its training responsibilities and jurisdiction to the provinces. Rather than accessing federal funding once for the entire program, provincial/territorial level Tourism Human Resources Council representatives had to approach their own provincial/territorial government for youth funding. This has resulted in inconsistent application of the program across provinces/territories.

The CTHRC has also developed some 40 **national occupational standards** for Tourism, essential skill profiles for 13 occupations, and workplace-based training materials and certification programs for over 25 occupations. These serve as a foundation for many of its other activities.

## *Other Canadian Sectoral Approaches*

### **The Retail Council of Canada Initiative to Develop Occupational Standards in the Canadian Retail Industry**

The Retail Council of Canada (RCC), in partnership with several other organizations<sup>3</sup>, has recently produced national Occupational Standards for (i) Sales Associates and (ii) First Level Managers in the Retail Industry. Together, these occupations constitute an estimated 80% of employment in the industry.

The RCC is developing the course content which will allow training agents/institutions to teach to these occupational standards. The RCC will manage the examination and certification process, although the examinations will be set and administered by a partner educational institution. The resulting certification will be portable across the retail industry.

There is a high level of potential applicability of these Retail Occupational Standards to the Food Retail sector. The role of the RCC as a central industry-wide agent in developing these standards and managing the training and certification process could also be of interest within Food Retail.

The American experience in using Retail Industry occupational standards may illustrate the potential application of these standards in a variety of settings, and thus be helpful in a Canadian context. The National Retail Federation (NRF) in Washington, D.C., has had a retail sales associate standard in place since 1997. Using this and related occupational standards, the NRF has developed a large number of partnerships at the national, state and local level to build the skills and improve the career opportunities and professionalism of retail workers. Over 15 states are involved.

These partnerships have taken a variety of forms, including supporting high school internships in Retail, supporting firms' training programs, developing college curriculums, and developing employee assessment tools. Several of these partnerships are briefly described in the companion Case Study document.

### **3. American Joint Labour-Management Approaches**

Joint Labour Management Training Partnerships have been an important innovation in American industrial relations during the past twenty years. Programs that have successfully assisted both active and laid off employees of large corporations appear to be fully supported by the union and the company, and resources are generally achieved through collective bargaining.

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<sup>3</sup> These include Human Resources Development Canada, Ryerson Polytechnic University, the Canadian Tourism Human Resource Council, and a number of large Canadian Retailers such as Sears, K-Mart, and Levi Strauss, among others.

Though funds are negotiated in the private sector, there has also been a broader renewal of interest in joint training among business, labour organizations, and the federal government. A recent report by the AFL-CIO, entitled “Skills for the New Century: A Blueprint for Lifelong Learning”, recommends that business, labour, academics and government make new commitments to improve education for workers. The Communication Workers of America (CWA), AFL-CIO, the American Council on Education and the National Association of Manufacturers have all agreed to pursue the report’s four goals. They are:

- To deliver education and training programs that lead to useful credentials and meet labour market needs;
- To improve access to financial resources for lifetime learning, including those in low wage jobs;
- To promote learning at a time and place that and in a manner that meets workers' needs and interests;
- To increase awareness and motivation to participate in education, training, and learning.

There are well-established training partnerships in four American sectors, i.e. telecommunications, steel, automobile, and aerospace. They are described in more detail in separate the companion Case Study document, and are as follows:

- **Quality Through Training Program (QTTP)**, (Boeing Corporation and the Industrial Association of Machinists of America);
- **DaimlerChrysler National Training Centre**, (DaimlerChrysler and United Auto Workers);
- **In the Telecommunications sector, the Alliance for Employee Growth and Development, Inc.; Pathways; and the National Advisory Coalition for Telecommunications Education and Learning.** (The Communication Workers of America, the International Brotherhood of Electrical Workers, and various telecommunications companies);
- **The Institute for Career Development, (ICD)**, (The United Steelworkers of America (USWA) and various steel companies).

All four partnerships are funded through collective bargaining, and have a proven record of successfully training and upgrading the skills of their workforce. Taken together, they illustrate the strong training initiatives which can develop through agreements between firms and unions, both of whom give training a very high priority.

While differing in details, these partnerships contain a number of similar features, many of direct interest to Food Retail/Wholesale. These include:

- Basic skills training (mathematics, literacy, computers, etc.);
- Technical and trades training or pre-apprenticeship;
- Degree/certificate programs in a number of fields;
- Tuition assistance.

In addition, several feature local training facilitators or peer counsellors who can provide individual assistance to trainees. Others provide a strong career guidance and development component. Most programs are open to both active and laid-off union members.

#### **4. Union-Led Practices**

Two union-led approaches, one British and one Canadian, have been identified as models with applicability to the Food Retail/Wholesale sector. They are the United Kingdom's **UNISON Open College**, and the activities of the **United Food and Commercial Workers International Union (Canadian Region)**. Each is summarized below and described in more detail in the companion Case Study document.

##### **1. UNISON Open College**

UNISON, Britain's largest trade union, represents a diverse membership of workers in the public and parapublic sectors in occupations such as health care, finance, social and other human services, etc. It coordinates educational and vocational training activities for participants who are comparable in many ways to those the retail sector. These points of comparison include:

- a higher than average percentage of female workers;
- a high level of early school leavers with little opportunity for continuing education;
- many female workers in temporary, part time, or insecure positions;
- occupational groups which are generally stratified along gender lines, and considered low skill, low wage work;
- female workers who experience greater difficulty accessing training due to child care and other constraints.

These trainee characteristics make UNISON's approach very relevant to the Food Retail/Wholesale industry.

**UNISON Open College** is based on a partnership between Open University (a distance education institution in England) and the Workers Educational Association (WEA). The

Open College offers both basic skills and job related training to active and laid off employees and others seeking to join a particular profession. The courses that are available include Return to Learn, associate degree, diploma and certificate programs in health, housing, and other areas.

Together these partner groups provide course delivery, certification, tutoring and peer support, financial assistance and so on. The Return to Learn programs are offered in a friendly, accessible and non-threatening format which students can pursue at their own pace. This encourages a high rate of participation among employees, many of whom do not perceive themselves as having academic skills. As a result, many graduates of these programs go on to take up further learning opportunities, at work and elsewhere.

Though UNISON does not have a formal national partnership agreement with an employer or group of employers, it does claim to be highly responsive to the needs of employers especially in the area of communication skills. A number of employers, recognizing the value of the Return to Learn program as a way to encourage employees to upgrade skills, grant employees paid release time to take the courses.

## **2. United Food and Commercial Workers International Union (Canadian Region) — Training Trust Funds**

The Canadian Region of the UFCW has about 200,000 members concentrated in food manufacturing and retail food sales and distribution. Since the late 1980s, the union has negotiated **Training Trust Funds** at the local level, which support training facilities and programs in remedial and vocational areas.

The Trust Fund agreements are included in the collective agreement or as a separate addendum, and provide an employer contribution toward the cost of education. These local funds are especially common in retail food; all of the major represented chains have some form of training contribution ranging from 5 cents to 25 cents per hour per employee, including part time employees. Many collective agreements have improved their training contribution over time. In most cases, the funds are remitted to the union that controls their use. In one case, the Clifford Evans Training Centre, the agreement is jointly trusteeed with employers.

In 1990, the UFCW Canadian Director established the National Training Fund, based on one cent per hour from each local training contribution. Initially these funds were intended to provide once only grants to contributing locals for the purchase or construction of a training facility. However in 1994, the National Training Program was created and offered a wider range of program and advisory services by two Directors.

In most locals where they operate, the trust funds have been used to construct local training centres. At the centres, a variety of training courses are provided to union members, including academic upgrading, computer courses, English as a second language, labour education, pre-apprenticeship, and courses specific to Food Retail. In one centre, a certificate program in Food Retail is being offered.

The local training centres constitute a local focus for training activity in the Food Retail sector which may have the potential to develop partnerships with universities to promote distance education approaches tailored to the sector. Interviews with universities active in distance education, described below, suggest that this may be an area for exploration.

## **5. Educational Practices**

Six innovative educational models have been profiled as part of the research. Reflecting the geographical dispersion of the Food Retail/Wholesale industry and the associated issue of access to training, four of these models possess a strong **Distance Education** aspect which should make them relevant to the sector. The four are:

- Ryerson Polytechnic University Bachelor of Commerce in Retail Management
- Athabasca University, Alberta, Canada
- B.C. Open Learning Agency
- Cornell Food Industry Management Home Study Program (Ithaca, NY, USA)

A fifth model, the **Cornell University Youth and Workforce Development Programs**, combines distance education approaches with youth internships, to attract young workers into the Food Retail/Wholesale industry.

The sixth model is included because it is one of the few Canadian university programs with a specific Food Retail Management component. It is the **University of Quebec at Montreal School of Management Module in Food Retail Management**.

The six educational models are each briefly summarized below.

### **1. Ryerson Polytechnic University Bachelor of Commerce in Retail Management**

Ryerson Polytechnic University introduced its Bachelor of Commerce in Retail Management in September 1998. It is Canada's first Retail Management degree, and is a four year program. It currently has 60 students in their first year in the program, and 90 students in their second year. Much of the incentive for the creation of the program followed a series of studies of the Canadian retail sector in the early 1990s, which identified a lack of a university degree program in retail as one of a number of the important issues facing the sector.

The program focuses on the four themes of Customer Service, People Skills, Technology and Strategy. It also uses a combination of 'traditional' teaching methods (lectures, seminars, workshops, case studies) and newer technology-based approaches. The latter include not only audio/video methods, but also CD-ROM, Internet-based teaching, and interactive Internet broadcasting. The first two semesters of the B. Comm. program are

fully distance-deliverable using a combination of Internet-based courses, books, and tutorials.

The program's Internet-based component is a major innovation, and is building towards Ryerson's goal of having the entire B. Comm. program deliverable in English and French via the Internet. This component contains a high interactive element, including chats/discussions, guest expert interviews, slides and audio tapes. It is deliberately designed to be at the 'high end' of Internet delivery, with many 'bells and whistles', in order to attract its key audience — high school graduates who are very Internet-literate.

## **2. Athabasca University, Alberta, Canada**

Athabasca University (AU) describes itself as Canada's leading distance education university, expecting to serve over 20,000 students from all parts of Canada this calendar year. Of its students, 14% did not have high school completion and 64% were women. It provided degree and certificate programs, but relatively little at the basic skill level.

The university's programs are primarily distance education-based, with study materials received by the student and completed at home. Students have access to a tutor by telephone or in person. Increasingly, the Internet is being used as a medium for course delivery.

According to an AU spokesperson, there is considerable potential for new course development and delivery in partnership with other organizations. Courses could be developed together, and accreditation provided by AU. In the case of Food Retail, for example, partnerships could be established with firms, UFCW training centres, or a sectoral organization to develop and deliver courses.

## **3. B.C. Open Learning Agency**

The Open Learning Agency (OLA), while not mandated to have a national scope, provides programs which range from K-12 to secondary and post-secondary programs, certificates, diplomas and degrees. For students at the remedial level, the Career and College Preparation Service provides more than 40 Adult Basic Education courses at the fundamental, intermediate and advanced levels.

The Agency's Workplace Training Systems (WTS) provides workplace training to clients around the world. In this context, OLA strives to attract client organizations with which it can partner to develop and deliver workplace training tailored to clients' needs. UFCW local 2000 has had discussions with OLA concerning a basic literacy program. The potential for partnership with OLA, as with Athabasca University, is worth exploring from the perspective of industries such as Food Retail.

## **4. Cornell Food Industry Management Home Study Program (Ithaca, NY, USA)**

One of the best-established distance education programs in the U.S. and Canada, the Cornell program includes over 50 courses and 400,000 students. It has operated since

1964, and includes training for virtually every job classification in the Food Retail industry.

Its Supermarket Series includes a broad range of operations and management courses such as Customer Relations, Finance and Analysis Sanitation, Front End management, etc.

In 2000, it will add management and operations courses with a departmental focus, e.g. meat and produce, bakery, floral, etc.

## **5. Cornell University Youth and Workforce Development Programs**

This is an educational program targeted toward “talented” high school juniors and seniors who study the usual Cornell coursework as well as interning in a participating retail food store. A school and a work mentor are assigned to each student when they become enrolled. Mentors support the student’s progress at school and in the host store.

In their Junior Year, students can organize their own schedules to complete their required coursework and hours of work in their host stores, all during regular school hours. Courses in the junior year include Fundamentals of the Food Industry, Front End Management, Effective Communications, and Customer Relations.

In their Senior Year, students continue to combine self study coursework with their work placement, covering Economics for Business, Grocery Management and Operations, Service Departments, Produce Management and Operations, and Meat Management and Operations.

The school mentor grades the course assignments and the company mentor provides an evaluation of the student's work experience. Credit can be earned toward their high school diploma, and the host stores pay the cost of tuition and books. The students also receive a small salary for hours worked.

Students who complete the high school internship and go on to further education in the sector become eligible for six credits of advanced standing from a participating college, and will have college program courses reimbursed by participating stores.

A related Cornell program, the **Food Industry Initiative**, is also under development in New York City. It offers disadvantaged youth and adults an opportunity to enter the workforce in a number of different areas, including the food industry. Partners in the community work with Cornell to prepare disadvantaged, low income inner city youth to improve literacy skills and participate in internships and mentoring programs. The purpose of the educational component of the program is to foster personal development, self confidence and community commitment. The **Food Industry Initiative** is a partnership of the university, the industry, educators and community based organizations.

## **6. University of Quebec at Montreal School of Management Module in Food Retail Management.**

The UQAM program is one of the few Canadian university programs with a specific Food Retail component. The 18-credit program is open only to students with a working knowledge of French and at least two years' experience in managing a food retail outlet. Its focus is therefore on skill and knowledge upgrading and updating. The module is not available in a distance education format.

The four courses offered under the module are:

1. Organizational Behaviour (3 credits)
2. Retail outlet Management (6 credits)
3. Introduction to Human Resources Management (3 credits)
4. Introduction to Management Studies (6 credits)

Fifteen students began the course in summer 1999, and another fifteen have followed in winter 1999.

### **III. Concluding Observations**

In reviewing the 25 training-related models, individual readers will likely first consider which are most relevant to their own situation. In considering training-related actions which their own organization might wish to take, readers will draw selectively from the individual models, referring most to the experiences of organizations similar to their own. Thus, for example:

- Representatives of smaller firms will likely wish to take note, in the small firm cases cited, of the strong links between business plans and human resource development cultures;
- Representatives from larger chains will note the variety of training delivery practices adopted by other chains, each reflecting its own competitive environment and most trying to achieve a degree of consistency in the training 'message' across many sites;
- Union representatives will likely focus first on union-led initiatives, noting their potential to bring in other partners such as firms or educational institutions to address their members' skills upgrading needs (particularly in the areas of basic skills), in a manner which supports and builds members' confidence in participating in learning;
- Representatives of both firms and unions will note the sophisticated training infrastructures established through collective bargaining in several American sectors where employers and unions share a common training priority, and will likely consider the applicability of these approaches in a Canadian context.

The Transition Committee, however, is looking at these cases not just from the individual perspective of each Committee member, but also from the perspective of the industry as a whole. Its agenda includes exploring what the industry as a whole can do to enhance its overall 'training culture'. In this context, the initiatives which involve partnerships among several stakeholders may have particular relevance.

The cases summarized above include a number of partnerships whose activities might be particularly thought-provoking for the Committee. Of particular potential interest are the following:

### ***Canadian Sector Councils***

Canadian sector councils, usually beginning as partnerships between employers and unions, have in many cases developed strong further links to educational institutions. Using these and other resources, the sectors have then been able to develop sector-wide initiatives which may be of particular interest to the Food Retail/Wholesale industry. These include:

- occupational/skill standards;
- courses for employees in the industry;
- training-related tools for workplaces;
- adjustment and career counselling measures; and
- youth and management internship programs to attract new employees into the sector.

The variety of such initiatives, reflecting the needs of individual sectors, together with their joint development, should stimulate interest within the Committee.

### ***Retail Sector Initiatives***

The activities of employers and educational institutions in developing occupational standards in the Canadian Retail Industry may also warrant further consideration. While unions were not involved in this Retail development, they are involved in sector councils such as Textiles and Tourism which have undertaken similar occupational standards work of their own. The potential to build training programs on the foundation of occupational standards is illustrated both in the experiences of these sector councils and in the American standards-based initiatives which are also cited.

The similarities between Retail in general to Food Retail in particular clearly raise the question of how applicable these Retail initiatives might be in a Canadian Food Retail/Wholesale context.

### *Educational Activities*

While the number of retail management degree courses and programs specifically in food retail management are limited in Canada, educational institutions have developed a number of activities relevant to Food Retail/Wholesale. The models described above point in particular to the potential for partnership between the sector and educational institutions in the areas of distance education and youth/management internships. While individual companies might be able to establish partnerships of these sorts on their own, the case study experience also suggests a strong potential for these to be established on a sectoral basis.

In summary, within these models there are examples of many initiatives which might provoke considerable thought within the Canadian Food Retail/Wholesale industry. While many individual models would be of interest to particular constituencies, others might introduce or reinforce ideas within the sector concerning whether to explore further a sectoral training approach and, if such an approach were undertaken, what initiatives to include on a sectoral agenda.

These decisions remain those of the sectoral stakeholders, based on their assessments of the cited models and their applicability and/or adaptability to the Canadian Food Retail/Wholesale industry.

## Overview of Training Models

<b>1. Company Approaches in Food Retail and Retail</b>					
<i>(a) Independent/Small Chains</i>					
<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
Company C, Ottawa, Ontario (5 stores)	Food Retail firm	Management, clerks	Management skills, product knowledge, orientation	Training centre (management); on-site (clerks)	Core firm values; hiring stresses people skills; training centre for management skills
Company A, Hamilton, Ontario (10 stores)	Food Retail firm	Management, new employees	Management skills, orientation	Train-the-trainer; video; Cornell courses	Training supports core firm values and overall human resources strategy
Company B, Whistler, B.C. (3 stores)	Food Retail firm	Clerks, new employees	Cross-training; product knowledge	Supervisor-delivered; Internet	Focus on reducing turnover, employee involvement, customer service
D&W Food Centres, Grand Rapids, Mich. (25 stores)	Food Retail firm	All employees	'Softer' skills (management); department-specific skills	Variety: videos, Cornell, in-house	Training supports core firm values and overall human resources strategy

(b) *Larger Retail or Food Retail and Wholesale Chains*

<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
SUPERVALU University, Minneapolis, Minn. (wholesale, supplying 3,500 stores)	Food Wholesale firm	All employees of retail stores it supplies	Marketing; Operations and Merchandising; Financial; Human Resource Management	On-site; video under development; other sources or methods as needed	Customized courses based on business assessment process
J. C. Penney	Retail firm	Store management and sales employees	Management: coaching, leadership, 'soft' skills;  Sales employees: product knowledge, customer service	Complete distance education delivery	An example of an integrated distance education delivery format with no use of traditional 'paper-based' or 'stand-up' approaches
Company D (Canada) (100 stores)	Food Retail firm	All employees	Technical and 'soft' skills for management and sales staff	Train-the-trainer approach	Focus on training consistency and trainer and trainee 'buy-in'
Company E (USA) (holding company; 1000 stores under five separate banners)	Food Retail firm	All employees of subsidiary banners	Business management, product knowledge, HR management, cashier training, etc.	Full spectrum of delivery methods excluding Internet; CBT used more often	Melding of banner-specific training (reflecting differing competitive situations) with generic training in particular areas such as cashiers.

<b>2. Canadian Sectoral Approaches</b>					
<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
Canadian Steel Trade and Employment Congress	Firms and unions	Active or laid-off production workers	Adjustment assistance services for laid-off workers from teams with labour and management members; generic steelmaking courses for active production workers	Adjustment: on-site and through action centres; steelmaking via community colleges	Highly developed sector level partnership between labour and management; full partnership with community colleges in training development and delivery; joint workplace training committees
Canadian Grocery Producers Council	Firms and unions	Active production workers	Thirty industry-specific and general education courses	Training partner organizations, incl. community colleges	Development of services for firms and unions in the sector, including training needs assessment, training plan development, joint workplace training committees
Textiles Management Internship program	Firms and unions, educational institutions	New managers	Textile science and manufacturing; management skills; occupational profiles.	Institution-based at university and college, plus internship	Industry-specific management development course, jointly developed by firms, unions, educational institutions.
Canadian Tourism Human Resources Council Tourism careers for Youth (Youth Internship Program)	Employers, educational institutions, young new entrants to the industry	Young new entrants to the industry	Customer Service skills, food safety, etc.; occupational standards	Institutional and workplace-based training; on-job internship	Sector-level initiative to attract young workers into the industry and address issues of industry image, etc., which are also often faced in Food Retail.
Retail Occupational Standards in Canada (including summary of illustrative American experiences with occupational standards)	Firms, educational institutions	Sales persons and first-level managers	Full range of relevant skills included in occupational standards	Occupational standards developed; course content under development	Sector-level initiative is strong basis for sectoral training activity; American experiences with standards illustrate potential

<b>3. American Joint Labour-Management Approaches</b>					
<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
Quality Through Training Program (Industrial Association of Machinists and Boeing Corporation)	Firms and unions via collective agreement	Active and laid off employees	Aerospace-related technical skills; education assistance; career and personal development assistance.	Delivered in training facilities or computer labs, etc., at each of seven manufacturing sites	Initiative jointly developed and in place since 1983; well-developed and extensively used programs
DaimlerChrysler National Training Centre (DaimlerChrysler and UAW)	Firms and unions via collective agreement	Active and laid off employees and family members	Advanced technical training; skilled trades preparation; literacy and numeracy updating; tuition assistance	National and regional training centres; NTC library of documents and videos; plant-level training	Initiative jointly developed and in place since 1996; well-developed and extensively used programs; skilled trades courses accredited by American Council on Education
Joint Training Initiatives in the Telecommunications Sector (Telecommunications companies, the CWA and the IBEW)	Firms and unions	Active and laid off employees	General degree/Specialized Certificate Programs in telecommunications, Applied Information Technology, etc.; computer literacy/Internet; Tuition assistance.	Extensive partnerships with universities and colleges; strong reliance on distance education and Internet	Jointly developed initiative; strong technical orientation; strong partnerships with educational institutions; innovative delivery methods
Institute for Career Development (United Steelworkers and thirteen steel companies)	Firms and unions	Active and retired employees and their families	Basic skills in computers, mathematics, GED preparation; Associate Science Degree; Tuition assistance	Plant-level courses; distance education; university accreditation	Jointly developed initiative; orientation to basic skills; strong partnerships with educational institutions; innovative delivery methods

<b>4. Union-Led Practices</b>					
<b>Model Name</b>	<b>Stake-holder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
UNISON Open College (U.K.)	Union	Active and laid off union members, many of whom are females in low skill occupations	Basic skills (writing, analyzing, numeracy) and personal tutors through Return to Learn; other associate degree, diploma and certificate programs in health, housing and other areas; financial assistance.	Return to Learn courses combine self-paced and distance learning with tutoring, sometimes at the workplace	Return to Learn program effective in re-introducing women with low education levels to learning in a friendly, supportive atmosphere which builds confidence to undertake further learning; strong partnership with the Open University of the U.K. in delivery and certification.
United Food and Commercial Workers and Training Trust Funds	Union and firms	Active union members in various Canadian locals	Food retail-related training including computer skills and skills upgrading in mathematics, reading, etc.; labour education, pre-apprenticeship	Most training given at local training centres built with support from the training trust fund.	Innovative funding mechanism; union-led training; potential focus for further innovative training approaches such as distance education

<b>5. Educational Practices</b>					
<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
Ryerson Bachelor of Commerce in Retail Management	Educational Institution	Full time students	Four skills themes, i.e.: <ul style="list-style-type: none"> <li>• Customer service;</li> <li>• People Skills;</li> <li>• Technology;</li> <li>• Strategy</li> </ul>	Traditional classroom plus CD-ROM and distance education; priority to make the entire program available via the Internet in both French and English	The first Retail Management degree in Canada, now in its second year; strong distance education element and planned availability in both official languages
Athabasca University, Alberta, Canada	Educational Institution	Full-time and part-time students, 14% with less than high school and 64% who are women.	Wide range of courses and degree programs;	A leading Canadian distance education university; increasing use of Internet-delivered courses	Flexible capacity to partner with a firm, union or other organization to develop and deliver courses using distance education methods; strong use of prior learning assessment and recognition to award credit for prior learning in order to reduce training costs/time
B.C. Open Learning Agency	Educational Institution	Full-time and part-time students	Programs at levels varying from K-12 to degrees, professional certificates, and diplomas; Basic Education; Workplace Training System customizes courses for clients	Distance education methods; customized training design and delivery	Demonstrated capacity to partner with a firm, union or other organization to develop and deliver courses using distance education methods;

<b>Model Name</b>	<b>Stakeholder(s)</b>	<b>Trainees</b>	<b>Skills Delivered</b>	<b>Methodology or Delivery</b>	<b>Key Issues or features</b>
Cornell Food Industry Management Home Study Program	Educational Institution, food retail employees	Food retail employees at every level	Wide variety of skills, with a food retail orientation, ranging from management, customer relations and accounting to food safety, merchandising and security; department-specific management courses to be added in 2000	Distance education methods; some introduction of Internet-based courses	Well-established distance education program operating since 1964; over 400,000 enrollment
Cornell University Youth and Workforce Development Programs	Educational Institution, young workers	Young new entrants to the industry	Junior year: Food store management skills, communications, customer relations; Senior Year: department management and operations, business economics.	Cornell distance education coursework; in-store internship; mentorship;	Well-established example of an internship program directly geared to attracting new entrants into the Food Retail Industry
University of Quebec at Montreal	Educational Institution	Food retail employees with two years' management experience	Organizational behaviour; Retail Outlet Management; Introduction to Human Resources Management; Introduction to Management Studies	Classroom-based	One of the few Canadian university modules in Food Retail Management

