

Apparel Executives Industry Perceptions: Implications for Academia

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The Los Angeles (LA) apparel industry represents the largest manufacturing employer in LA County, which makes it a prosperous combination of jobs and creativity. Los Angeles has been looked upon by other fashion cities as a place where a creative entrepreneurial spirit influences fashion trends throughout the world. However, the apparel industry is faced with many challenges.

The study analyzes apparel manufacturer executives' responses in relation to work force skills of apparel production managers and LA business trends. The research goal was to provide a general sense of business trends related to the apparel industry. Apparel executives discussed skills and training, education, employee promotion, employee motivation, technology use, employee turnover, strategic goals and perception of the industry's future. These issues can be valuable to educators to refocus their curriculum to what has been expressed by apparel executives. The findings indicated that educational knowledge needed a blending of many disciplines. The education of future apparel managers need interdisciplinary courses to achieve future success. The findings can assist academicians with apparel curriculum development in understanding the interdisciplinary nature of the apparel industry.

Introduction

In 1999, the Los Angeles apparel industry represented the largest manufacturing employer in Los Angeles County and was the nation's largest apparel manufacturing center (LA's Business Team, 1999). In 1999, LA County had 4300 apparel firms that employed 130,000 people (LA Economic Development Corporation [LAEDC], 2000). New York, often highlighted as the United States fashion center, employs 60% fewer people than California (US Department of Labor, 1999). Apparel manufacturers in LA County, generally, have had few employees working for a single company. In 1998, approximately 88 percent of apparel manufacturing firms employed from one to 49 people (LAEDC, 2000). The typical apparel worker profile was female and Latino (Mittelhauser, 1997).

LA has a unique apparel industry. The majority of apparel firms consist of entrepreneurs. In general, American manufacturers have a competitive advantage because they are capable of responding rapidly to changes (Mittelhauser, 1997). LA apparel-manufacturing firms possess a quick response quality by being able to quickly produce fashion garments. All the components needed in order to make a garment are located in LA County – textile firms, trim suppliers, dye houses, specialty contractors, and skilled employees. The close proximity of which are assets in producing *quick response* garments.

The LA apparel industry's manufacturing environment has changed how United States (US) apparel companies operate and how they have adjusted to changing conditions (Staples, 1993). An array of constituent factors has affected manufacturers including employee training, work place practices, new laws, innovative production systems, and globalization. The future of the LA apparel industry depends on how and if companies adapt to a changing apparel manufacturing environment. The future involves not only owners and managers but also the entire work force. Educational institutions play a significant role in preparing individuals

desiring work in the apparel industry. With an increase of technology used in the apparel industry, computer and technological training is necessary.

Background

Skills and Training

Although most apparel employees were trained on the job, many positions required formal educational training. Computer skills were essential in most apparel manufacturing areas (US Department of Labor, 1999). Additional training was required for operators who worked with new technology. Mittelhauser (1996) stated apparel operators' skill levels were low because much of the new equipment was designed to keep worker retraining to a minimum. Important proficiencies for apparel production workers were technical skills, team-based skills, conflict resolution, and problem solving skills (Fralix, 1994). The use of technology may boost an employee's morale and commitment to his/her job. DesMarteau (1996) noted that companies experience high employee turnover, slow throughput times, and poor quality when employees believed they were 'going nowhere' and not satisfied with their careers.

Education

In the 1990s, the US apparel industry was undergoing major transitions requiring refocused work force skills. These transitions have affected opportunities available to US students entering the apparel industry and career paths of those currently employed ("The State of the Industry", 1996). Regarding the apparel and textile industry, the Career Guide to Industries noted that most production workers were trained on the job. Although a high school diploma is not required, employers preferred it as well as knowledge of basic math and computer skills (US Department of Labor, 1998).

Employee Promotion

One success factor for apparel workers occurred when they obtained knowledge of business operations or production process (Hill, 2000). Some apparel manufacturers reported difficulty in finding skilled workers. Change and advancement has been a reward for workers who learned how to work with new technology (Mittelhauser, 1996). Thus, employees received promotions based on newly acquired skills.

Motivation

The apparel industry has been faced with challenges to develop new ways of motivating employees (Hill, 1990). Piecework incentives have been prevalent in apparel manufacturing; however, the incentives did not execute intended results in operator performance (Lloyd, 1983). Other employee motivators include pay increases, good working conditions, and bonuses, which have encouraged learning (Baker & Frastaci, 1999). Employee motivation resulted in successful technology implementations, quality standards, and customer relationships (Hill, 1990).

Technology

In the 1990s, shifts in consumer tastes, pricing pressures from retailers, and increased technological demand have challenged the apparel industry. An increase in global manufacturing has affected technological advances in transportation, communication, and production

(Mittelhauser, 1997). As the price for automation or apparel software decreased, and the importance of technology was understood, apparel manufacturers implemented computer equipment (Mittelhauser, 1996). Apparel manufacturers that adopted industry technologies have tended to fare better than those who did not invest (Mittelhauser, 1997).

Employee Turnover

Wong (1998) found that LA apparel industry employee turnover ranged between 5 and 10 percent. Presley (1997) noted that individual incentives affected employee retention and lowered turnover. In addition, companies that implemented individual incentives, as opposed to team incentives, resulted in better work retention. Fewer absences and lower resignation rates correlated with an employee who connected, participated, and considered his/her job important to self worth (Robbins, 1996). Robbins also noted that conflict levels were lowest when strong interpersonal relationships existed among employees.

Strategic Goals

Companies often developed strategic plans based on external and internal environments. Some factors that affected strategic goals were global forces (role of government, interest rates, new technology), competitive forces (market share, customer and supplier relationships), and internal factors (stakeholders, company's goals) (Harrison & St. John, 1998). One common strategic goal in the apparel industry was to compete with other manufacturers in a global market by minimizing labor costs. Many apparel manufacturers believed that domestic sewing has become too expensive due to employee wages. Many apparel companies have opted to produce goods in Mexico because of the close proximity to the US and its low labor costs (Ellis, 1998).

Method

The purpose of this study was to solicit LA apparel executives on business factors: education, employee promotion, motivation, employee turnover, and strategic goals. Data for this study used a qualitative inductive approach. Data were collected during August 1999 to December 1999. The sample was selected from directories listing apparel manufacturers in LA County and through professional contacts. The subjects were apparel business owners and executives (henceforth referred to as executives). Executives were selected because they are a company's primary decision-makers, tend to be future-oriented, and could give the researcher further insight into the industry. An initial telephone call was made to apparel manufacturers. If the contact was interested, the owner/executive was mailed a letter of introduction and sample questions. The executives were contacted by telephone to set up an appointment to be interviewed at their business facility. They were informed that the interview would last approximately one hour. The interviews were audio taped to facilitate the interview process.

The interviewing questions were developed by the researcher to assess business trends in the apparel-manufacturing environment using secondary data (*e.g.*, books, surveys, and prior studies) to develop questions. Probing questions were developed to assess the executives perception for the future of the LA apparel industry. The researcher used an interview guide approach in which questions were predetermined prior to the interview. The researcher pilot tested questions with apparel executives. Questions were refined and the instrument consisted of eight probing questions.

The researcher conducted and taped the in-depth interviews at company headquarters. The researcher transcribed tapes by listened to the audiotapes once for clarity, then listened

to the tapes a second time to identify themes, and then word-processed the audiotapes. After transcription, the researcher analyzed each question and responses across common themes. For example, all executives question one responses' were read thoroughly and analyzed. This process was repeated for each question and response. All the interviews were analyzed as a whole for each question; however, each individual's response was reflected in results.

Results

The results presented summarize the opinions of LA apparel executives on current and future strategic business goals. Executives were solicited for their knowledge on the need for apparel manufacturing managerial skills, education, promotion, motivation, and technology turnover. A detailed narrative can be found in Garcia's (2000), *LA Apparel Industry: Business Trends*. Although the sample consisted of LA apparel manufacturers, results could vary if the questions were asked to executives in other US regions. The executives provided information to the challenges and necessity of certain skills.

Current and Future Managerial Skills

The researcher asked executives to describe current and future managerial skills needed for production managers. Results indicated that managers would need different skills in the future, than those expected today. Executives noted that current production managers had extensive industry experience and needed to be computer proficient, specifically in Microsoft Excel. Common responses were that production managers needed organizational skills, the ability to take on responsibilities, initiate decisions, and have a sense of urgency. Additional responses noted as important were communication skills and technical skills (e.g., patternmaking). One executive stated, "Part of the communication skills is the process of explaining what needs to be done, working with the person [employee], showing what needs to be done then observing the person [employee] doing what needs to be done." Another skill mentioned was to be bilingual. One executive commented however, "They must speak English...they need to read specifications, they need to read shop tickets."

Executives noted that the managers had many responsibilities. One executive commented about his production manager, "The only thing she had to learn was how to run 300 people in a factory." Another executive stated, "We try to give training in how to deal with employees and how to work as a supervisor versus a regular employee."

The future skill set required more defined proficiencies than the current managers' skills. The executives indicated that in the future, production managers needed additional knowledge related to computer software (e.g., Microsoft Excel), labor laws, imports/exports, and duties. The executives also stated future skills needed were a business sense, communication skills, management skills, organizational skills, and teamwork skills. A future managerial skill noted as important was the ability to understand the *change* process. One executive commented, "Some companies are learning today that to become successful, you have to go through the process of change. When you're changing processes within a company, managers are the keys to making this [change] work. We cannot institute change within a department if we don't have a manager's support."

Current and Future Educational Needs

The executives were asked to respond to educational needs. When asked if an educational degree or certificate was currently essential in the apparel manufacturing industry, the majority replied with no. However, executives commented that it depended on the position and company size. Executives stated that industry experience was the most

important attribute. The executives commented that it was to an employee's advantage to have a degree or specialized education. They noted that night courses allowed an employee to learn sophisticated tools that met apparel industry needs. One executive indicated that his production manager's growth was not attributed to her degree but her ability to adapt to change and think analytically. Executives emphasized the need for classes that taught apparel manufacturing, change management, leadership skills, and organizational skills. Executives indicated that schools were not training in these areas but instead taught general theories, which did not relate to the apparel environment. Another executive indicated that technical training was important if a company invested in software.

Multiple executives provided examples of how their education or specialized training helped in their own personal and business life. One executive indicated that education showed an employee's ability to learn, be loyal, and have job commitment. Another executive stated that a class in public speaking was one of the most useful classes because it allowed one to overcome nervousness in front of a crowd. Another executive stated that what he had known for thirty years was dated and he had to relearn new apparel manufacturing skills by returning back to school and learning new processes for apparel operations. The executive said, "I think a person has to update himself constantly."

In response to education needed in the future, the majority of executives were optimistic and stated that higher education was essential. One executive stated a higher educational degree "would be like a wish". Yet another executive commented that the future was based on their current situation, "A degree in languages would be helpful since we are sourcing in so many countries". Some executives noted a person's perceived educational level was shown by his/her verbal and written communication skills. Several executives' related the need for increased education due to the substantial supply chain management pressure from retailers. Retailers were noted as requiring manufacturers to have electronic bar-coding and unit production codes (UPC), which required employees to have computational abilities, literacy skills, and mastery of the English language. Some executives commonly shared the idea that increased computer usage required increased educational needs. The executives stated that the future work environment would be comprised of extensive computer use. They emphasized that in order for employees to be proficient, technical knowledge should be obtained at a specialized school.

Employee Promotion

The executives consistently agreed that they promoted employees from within their own firms. Executives stated that a job promotion required an employee to know a company's particular manufacturing process and to understand company needs. One executive stated that he only hired employees from outside of the firm if their current employees did not meet criteria for specific positions. A successive question asked was, what if an employee was not ready to be promoted. An executive commented that you hurt a business if the wrong employee is placed in the wrong job. One executive responded that some may not be able to "get past the psychological barrier" of attaining more responsibilities and this is "something the upper management has to realize and watch". When asked what were the criteria for promoting employees, the executives indicated that criteria constantly changes. One executive said, "In interviewing someone, you're not looking to fill a job today but for the future".

Current and Future Work Employee Motivational Factors

People were noted as being a critical resource for a successful business. Employee loyalty and employee respect were important elements mentioned. A following question asked executives to respond to how they motivated their employees. Common shared responses

were bonuses, paying weekly, providing employee benefits, recognizing employees' efforts, sharing information with employees, and working as a team.

Executives were asked what motivational factors were currently important and what employee motivational factors might change. Executives agreed that bonuses, salary, and health insurance would remain constant. One executive indicated that having women as the majority work force affected the apparel industry. He noted that childcare and maternity care were prevalent factors and commented, "We will adapt as a particular need comes up." Others indicated working within stringent state laws restricted one from being flexible with employee's schedules.

Investment in Technology

The executives indicated that their companies had invested in technology (e.g., automation, apparel computer software). One owner stated that their company was not currently investing in apparel computer software but stated it was "at the top of our list because we do believe it is important." Automation was noted as being investment for a small company. All executives that had invested in apparel software indicated that continual upgrading was necessary. Executives stated they invested aggressively in technology to be consistent with industry standards. In order to survive in the future, apparel executives stated that companies needed automated sewing factories, cutting technology, computerized design, grading, and marking. One executive invested 10 to 15 percent of total company's profits back into the business, specifically for automation and software.

The researcher asked a successive question regarding future apparel manufacturing processes. Common responses, expressed by executives, were that future processes required an investment in time, money, and patience. One executive explained that they looked at how a computer system by whether it deskilled operations, made operational tasks easier, and had a user-friendly interface. Another common response was the need to train employees on automation use. Two executives indicated that once employees get past the training period and see the results, for example from using a faster computer, they appreciate that the company invested in better tools to do their job. One executive sent employees out for training as well as had a support group come to the facilities to train.

Employee Turnover

Executives reported a low employee turnover rate, which ranged from two to six percent. At one company, in a three-year time span, only two people had left out of 300 employees. Low employee turnover rate was commonly observed among sample makers and pattern makers. One executive's response was that sample makers "don't go anywhere...they're here forever." Executives credited job security as a reason for low employee turnover such as employees who had worked at one company for 25 and 35 years. One executive commented, "Where there is more financial security at a company, generally turnover is much lower."

Strategic Goals

All the executives indicated they set company strategic goals. Most executives set strategic goals based on company growth or stability, while one executive wrote the company's business plan to reflect a personal goal to retire soon. They indicated that successful strategic plans required multiple meetings and sharing information. Typical strategic goals were to expand market share, create and identify new markets, and be more service-oriented by producing small lots. One executive described the company's strategic goal in detail by indicating that it was extremely important for companies to invest in market

research that defined and targeted specific markets.

Executives expressed concerns in dealing with fickle consumers and retail demands. A common shared statement among the executives was the quick environment that the industry revolves in and the need to stay focused. One executive said, "Even an annual budget cycle is too long in today's quick turnaround." The average strategic goals were set one year in advance, however; one company had a ten-year strategic plan. In general, managers commented that goals needed constant updating because of the quick cycle of the garment industry.

Perception of the LA Apparel Industry

Perceptions were both positive and negative as to the future of the LA apparel industry. Positive perceptions were industry uniqueness, upgrading contractor capabilities and the entrepreneurial spirit found in LA. Negative perceptions were the replacement of people with automation adoption, and bad reputation of sweatshop image of the industry.

Several executives described the uniqueness of the LA industry as continued business strength in the future. One executive declared the "LA apparel industry is the most exciting region in the country". The basis for his reasoning was the continuation of a diverse population. Two executives commented about the need to maintain the entrepreneurial spirit that represents the LA apparel industry in the next decade. One executive described LA as a *vertical industry* from the integration of LA' textile firms, among suppliers, dyers, and contractors. He stated LA as being innovative, trend setting, and having interconnections that other fashion cities did not have.

A common shared response expressed by managers was that automation was the reason for apparel industry change and it would be the most influential factor in future apparel operations. An executive commented that, "A lot of people are [being] replaced by automation." Others commented that local production had been lost; however, it caused upgrading of sewing contractors' capabilities. Another executive stated that with automation investment, an apparel manufacturer could survive domestically. He concluded that automation results in opportunities to work with retailers who demand quick response" and indicated, "Operating a plant in LA was creating the illusion that we can ship garments in days".

One executive discussed the reality of how much money was necessary to start an apparel manufacturing business and operating an apparel business. Another executive described New York as the sales and corporate part of the industry. He expressed his belief that apparel executives in New York were concerned about a company's stock price; whereas, LA apparel executives were concerned about the "results from retail from the day before". He also expressed a concern about the LA industry, "The worst thing that could happen is a creative company gets bought up by a corporate entity and takes away the entrepreneur and takes away the creativity."

One executive expressed negative perceptions about downtown LA, indicating the industry had lost a sense of community because it was too spread out. Another executive expressed his concern that the industry needed to become more professional than its current practices because the industry has had a bad reputation of practicing unethical standards. The executives felt the industry image needed change because the general public's opinion is that the industry has a sweatshop image. One executive suggested people needed to know that the apparel industry was decent and was where a person could make a good living. Some executives expressed ethical concerns and the obsolete necessity of working with documented and legal citizens. Executives commonly expressed the concern of the increase in

production done in Mexico taking business away from LA contractors. LA's sewing contractors were mentioned as being important for the LA apparel manufacturing industry, which can produce garments more quickly than in Mexico or in Asian countries.

Recommendations

The majority of the apparel owners/managers shared similar viewpoints on current and future apparel business trends while individual opinions and attitudes differed. Factors that were important to apparel executives were the future of the manufacturing process, impact of technology, and performance of the work force. While education was expressed as currently not an important element, indicating industry experience was the most important criteria. Industry experience, noted by managers, implies a need for a strong apparel and textile knowledge. The following recommendations are made not only for managers but also for the entire workforce.

A curriculum that requires internships provides students with a good introduction to industry experience. The executives did believe the future forecast for educated employees was essential. Apparel curriculum should use apparel managers suggestions to incorporate technology (e.g., Microsoft Excel, industry specific computer programs) and work force performance.

The industry's growth will depend on the commitment to technology, education, job training and development. LA has schools that specialize in the apparel industry; however, achieving a higher level of education among members of the apparel labor force has not been encouraged in the past. An interesting dilemma is, if companies encourage employees to take classes in apparel technology, business, computers, and English, would this not benefit the firms in the end? Although industry experience was a determining factor, the future presented some new skills such as increase need for computer proficiency and knowledge of labor laws. This opinion is consistent with the article "Supervisors Must Face Changes" (1995) which indicated that as global production creates changes in an employee's work environment, the need for specific new people skills and technical skills are likely to arise.

Multiple executives invested and continually upgraded automation and/or apparel software. Training employees was an intricate part of adopting the use of computer programs. The production process, at all levels – designing, patternmaking, cutting, sewing, sorting, shipping, can all be done using a computer. Apparel management curriculum programs need to require computer courses, which will be significant tools used by companies in the immediate future. Apparel management programs also need to require use of up-to-date industry equipment, computer hardware, and software.

Executives commented that setting strategic goals in any business was a challenge but keeping on track was more of a challenge. This observation was especially true in the apparel industry where consumer tastes constantly change causing an immediate impact on production. Strategic goals were individually customized to each company's current business status.

Time is one of the most important factors in apparel manufacturing in order to reduce lead times, inventories, and expenses. Due to immediacy, typical in the apparel industry, situations often arise during production creating excess financial expenses. An example is when fabric ordered from a supplier does not arrive on time which impacts production planning by either substituting raw materials or canceling an order. These unplanned situations are not accounted for in a firm's annual budget and planning goals. For an individual to respond to unplanned situation creates a need for courses that focus on manufacturing strategies, time

management, and specific industry practices. Apparel-related case studies would be one viable tool for students to develop these problem-solving skills.

Apparel manufacturers need to transform its management structure (Jacobuis, 1997) such as sharing information. Sharing information allows individuals to participate and work as a team to achieve goals and results. A suggestion is to allocate one hour per day in which a few employees could tour company facilities and be introduced to other employees in different departments who can explain their responsibilities. Not only will those describing what they do feel proud and describe their work as important, but they will also be aware of other areas of production and operations in the company and have exposure to varying career ladders. Many times, employees are not aware of various operations within an organization and do not know other employees who work in other departments. A course in employee interrelations allows individuals to understand job importance within organizations.

The apparel industry is becoming globally diverse. The need to understand sourcing, logistics, and distribution are increasingly becoming common knowledge in the apparel industry no matter what the size of the company. The opinions of these executives should not be overlooked. The executives' synthesis of the apparel industry, as mentioned previously, is viable. Their advice may be used in planning apparel management curriculum.

The LA and US apparel industry work force is extremely diverse. Executives indicated that individuals who could coordinate global production and who were multilingual are in demand. This issue should make a company reevaluate the treatment of the work force. Many different nationalities are involved in the apparel industry, which makes this business global in nature. If a company understands its employees, it can develop a dedicated team. For example, understanding the holidays celebrated, rituals, customs, and the work ethics of a person from Mexico may be different from understanding those of a person from El Salvador. Motivational factors would possibly be managed differently after gaining an accurate understanding of the work force. Therefore, a course in diversity and cultural-issues as well as language would be beneficial for students entering a global manufacturing.

Changes can only be made and worked successfully if there is an understanding of the work force. Workers need to be able to be empowered to voice their opinion and to give suggestions because they are the backbone of the industry. Although, many companies executives would probably defend that they do empower workers, the employees may state otherwise. If for example, cross training and automation are future production processes, the employees need to know that these are future company plans. Manufacturers need to realize the importance of providing training to their employees. Better relationships with trade and technical institutions are essential in order to project the needs of the industry.

A last recommendation is for individuals to be involved in setting the future of the apparel industry. The authors have noticed a low turnout by apparel executives, owners, managers and contractors for local meetings that focus on labor issues, technology, finance, state incentive programs, and education. Apparel executives and contractors should work together, and can only do business in the future, if they plan together. Academicians as well as higher education students need to be part of apparel industry future planning. In order not to let this stimulating industry slip away from LA, representation is necessary by all - not just organizations that represent groups of manufacturers, contractors, or the employees. A new perception, new ideas, and new resolutions to challenges that affect all in the industry would be visible with the creation of new channels of communication and cooperation.

Conclusion

This study found that apparel executives recognized that the apparel industry is undergoing a transformation, specifically with the adoption of technology and global production. The executives noted that setting strategic goals and future success required involvement from all company employees because employees play an important part in fulfilling company's goals. The skills of a work force were determined by a firm's interest in investing in technology. Although industry experience was a dominant stated opinion by executives for current needs, the future forecast for higher education was evident. To meet future demands, executives were more forward thinking and they expressed the necessity of higher education. Overall, executives noted the need for management knowledge in areas of leadership, organization, communication, change and computer proficiency specifically related to apparel manufacturing.

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