



**ENTREPRENEURSHIP  
INSTITUTES  
IN  
POLAND**

Ninth Quarterly Report  
July - September, 1993

**CENTER ON EDUCATION AND  
TRAINING FOR EMPLOYMENT**

The Ohio State University  
Columbus, Ohio

## **ENTREPRENEURSHIP INSTITUTES IN POLAND**

**First Quarter Report - Year III  
July - September, 1993**

The first quarter of Year III of the U.S. Agency for Development (US AID) funded project continued to expand the expertise of the three Polish-American Enterprise Institutes in Białystok, Poznań and Rzeszów.

The goal of the project continues to encourage teaching of market economics education through business-type schools in Poland with emphasis on entrepreneurship, small business management, marketing, finance, strategic planning, export-import and small business consulting. The strategy selected is to empower a large group of faculty in three universities to expand their competence in teaching these courses. In addition, we have added six new seminars on team building, selling, negotiations, human resource management, retailing, market research. As a result, the faculty will develop curriculum of the new seminars with the technical assistance of the OSU consultants.

### **BACKGROUND**

During this quarter we observed another parliamentary election in Poland. Democratic Left Alliance (SLD) took first place in the election. Its leaders emphasized that they were interested in a stable government based on a wide coalition with other parties, including the Democratic Union. They promised to reduce unemployment, which was more than 15.4 percent of the labor force, increase pensions, not to increase already high tax burdens, but "it ducked skirted about its budget deficit and inflation game plan."

The Democratic Left Alliance, composed of former communists, won 171 seats in the 460-member Parliament. The Peasant Party (PSL), also with communist roots, took 132 seats. The Democratic Union (UD) led by outgoing Prime Minister Hanna Suchocka placed third with 74 seats. The Union of Labor (UP), a small leftist party with Solidarity roots took 40 seats. (*Warsaw Voice* Sept. 26, 1993)

There is no concern among the businessmen and there is no reason to call us "communist Poland" - said Marek Goliszewski, president of the Business Center Club. The club includes 600 private enterprises which employ 400, 000 people.

There were different opinions why it happened. Here are some of them:

"The Poles never experienced unemployment before 1990. No wonder they leaped to the Promise by the SLD, the party of former Communists, of kinder, gentler policy."

"Many Poles voted against the government because it brought abortion restriction, and other teachings of the Catholic Church into daily life."

"They voted against changes that brought some of them vast fortunes but others continuing misery".

"The numbers say that Poland's version of shock therapy-leaping from a command economy to capitalism overnight is working". (*Życie Warszawy* Sept. 26, 1993)

*Back to school for Everyone* is a title of an article in which Deputy Labor Minister Michał Boni underlined that Poland had problems with unemployment because workers' qualifications were ill-suited to the economy's needs. "In the next two years, people will be laid off in liquidated and transformed enterprises. Before they learn professions and find regular jobs, they will need temporary jobs, like employment with local public works". (*Gazeta Wyborcza*, Sept. 13, 1993)

After *Wedel* and *Wawel*, Poznań's *Goplana* was the third largest confectionery firm aiming to privatize. "We need privatization like water and air" said Janusz Rutkowski, *Goplana*'s director. The purpose of privatizing the plant was to stay on the market. *Goplana* was going to set up a new company with British company MAN. The final decision was to be made by the Privatization Minister Janusz Lewandowski. (*Warsaw Voice*, Sept. 26 1993)

Reforms in Poland will continue despite the election, so their future thrust will remain the same as now, said Hanna Gronkiewicz-Waltz, president of the National Bank of Poland (NBP) during the annual meeting of the International Monetary Fund and World Bank governors. (*Warsaw Voice* Sept.26, 1993)

In Poland, 27 projects are being carried out from The International Finance Corporation (IFC) funds including 14 through a credit line for small and medium-size enterprises. In order to reach for IFC funds, such sectors as development of

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power generation, telecommunication, network and environmental protection must be privatized at least partially. Damian Damianos, IFC resident representative in Warsaw said that in Poland it is possible to observe progress (*Warsaw Voice*, Sept. 26, 1993)

A new goods and services tax (VAT) was introduced on the 1st of July 1993 and replaced the old turnover tax. The new law represented a key step in the transition to a market economy.

Included in the Background section of the Appendix is an article on business opportunities in Poland written by a marketing professor Mr Stan Paliwoda, in which he presented an interesting analysis of the Polish market.

## **SCOPE OF WORK**

The following information presents the scope of activities performed by the OSU staff, Solidarity Economic Foundation staff and the three Institutes during the first quarter of Year III of this project. It is divided into the standard tasks proposed for the continuation of the project. A summary listing of the activities is at the end of this section. In addition to this there is also a calendar of specific activities for the Year III.

The appendix to this report includes examples of the work and results of staff activities in this quarter. The appendix is organized to support the 9 tasks of the project. Reports on the result of the activities of each of the Institute are documented in Appendix 4.0.

### **1.0. Coordinate Program**

During the first quarter of the Year III of the project CETE staff continued to work cooperatively with the Solidarity Foundation and the three Enterprise Institutes to plan the work needed to assist the Institutes as they are becoming more independent in their activities.

Our priority during this quarter was to encourage the Institutes to take more responsibility for their activities as the program of the project was passed

on more directly to the Institute to move them toward self-sustainability.

This report is particularly focused on establishing the Institutes' satellite offices and preparing programs for new seminars.

The Polish coordinators visited the U.S. in June to be involved in activities of the International Council for Small Business annual conference in Las Vegas. While in Columbus they experienced a day in the life of American small business enterprises and participated in lectures on requested topics presented by the OSU faculty members. Members of the OSU faculty were asked to give a presentation on defined topics - team building, negotiations, and retail management. The faculty represented by prof. Janina Latack, prof. Wayne Talarzyk and prof. Roy Lewicki worked with the Coordinators to develop strategies for the new seminars. (more details in section 6.0)

We interviewed a number of consultants to identify the best who might serve as a consultant to our coordinators and faculty of each Institute. We selected dr John Turner, Associate Professor, marketing education who presented to our Coordinators two topics - *selling* and *e-mail*. John Turner agreed to spend three months in 1994 in Poland to provide the Institutes and staff with assistance in developing instructional materials on selling and human resource management, the usage of *Internet*, upgrading the skill of the faculty and improving teaching techniques.

We visited Poland in September to meet with our coordinators to make plans for the coming year and also to visit our Institute in Poznań to decide about the future of the Institute.

In terms of the Poznań case we took the final decision to replace our coordinator Walery Lach who did not get along well with the Director of the Institute, Zdzisław Krajewski. To understand the situation in the Institute better we sent a questionnaire with 16 questions to both of them separately. Their responses gave us a clear picture of them and we understood that they would never work as a team to move our project on. Besides we interviewed members of the faculty and spoke with the Dean of the Economics Academy in Poznań who strongly supported Zdzisław in his activities. He also assured us that Walery would continue to work in the Economics Academy as he was recognized as a very good specialist in marketing. Since we were not fully satisfied with Zdzisław

Krajewski we asked the Solidarity Foundation to check closely on changes in the Poznań Institute during the next quarter. (see our questionnaire and responses of both coordinators in Appendix 1.0)

We visited the US AID office in Warsaw to meet Ms Magda Wyganowska to discuss our plans for the next year and to present the actual situation in Poznań Institute.

The OSU and Solidarity Foundation staff was invited to participate in the IV Conference on "The role of Business and Innovation Centers in the Regional Development and Promotion of Small and Medium - Sized Enterprises" at Błażejewko, near Poznań, September 22-25. C. Ashmore gave a presentation about *Entrepreneurship Programs in Poland* and A. Unterschuetz about *Self-Employment Competencies Education as a Part of Vocational Education in Polish Education System*.

OSU prepared the subcontract with Solidarity Foundation for Year III and the Foundation made contracts with each Institute.

The Solidarity staff continued to provide assistance to the project during the quarter. They made weekly calls to the Institutes to coordinate activities. They supervised the budgets for each site and made quarterly payments to each site. They submitted information on project activities both to Nina Majer and to us for our report to US AID.

## **2.0 Establish Satellite Offices**

In this quarter each Institute focused its activities on carrying out the satellite concepts which would be an important part of their long-term plans to expand the services of their staff and faculty in a large geographical market.

Each Institute spent a lot of time on identifying three cities to serve as satellite offices and selecting proper coordinators. They established new relationships with the local government, organizations and institutions interested in developing small businesses in their region. They negotiated with regional organizations the possibility of obtaining facilities for the Institutes' satellites free of charge. (detailed information in Appendix 2.0)

The satellite offices will offer the basic Institute's courses which will be taught by the faculty of the Institute.

Each Institute established office procedures based on their own experiences in running the Institute for two years of implementing the project. They assigned new satellite managers the following scope of responsibilities:

- making contacts with local government, banks,
- working with business owners
- arranging class facilities
- finding local consultants,
- organizing and promoting courses,
- writing reports etc.

The budget of each satellite is managed by the Institute coordinators who serve as mentors to the satellite managers. They provide the managers with trainings, showing them how to run the office and carry out the project.

Each Institute selected three satellites:

Białystok:	Bielsk Podlaski, Łomża and Suwałki
Poznań:	Gniezno, Konin and Zielona Góra,
Rzeszów:	Przemyśl, Sanok and Tarnobrzeg

Each satellite office will deliver the courses next quarter.

### **3.0 Assist Faculty in Developing New Seminars**

The OSU staff assisted the Polish coordinators to develop new seminars which would be designed to address small business owners. The Institute faculty were expected to develop these seminars as part of the team effort. The topics of the seminars were selected by the coordinators last year. The basic courses (approximately 150 hours) will be continued as the foundation of the Institutes' program to assist business owners in upgrading their skills.

We started to work on the new seminars when the coordinators visited Columbus in June. They had an opportunity to develop their ideas with OSU consultants - prof. Janina Latack, Prof. Wayne Talarzyk, prof. R. Lewicki and John Turner - who gave them a presentation on a particular topic. The OSU consultants

expressed their willingness to assist Polish coordinators in the future. We see the American consultants' role to:

1. identify key topics and resources for Polish faculty,
2. review course teaching outline which will be developed by Polish faculty in Poland and suggest additional materials if still needed,
3. review the content of seminar materials with OSU staff,
4. conduct training seminars for Polish faculty in 3 sites (Białystok, Poznań and Rzeszów) and present teaching methods in cooperation with the Polish seminar developers.

Each institute was assigned to prepare 2 new seminars with the assistance of OSU consultants:

- |            |   |
|------------|---|
| Białystok: | - <i>Negotiations</i> with prof. R. Lewicki<br>- <i>Human Resource Management</i> with dr John Turner |
| Poznań:    | - <i>Retail Management</i> with prof. Wayne Talarzyk<br>- <i>Market Research</i>                      |
| Rzeszów:   | - <i>Team Building</i> with prof. Janina Latack<br>- <i>Selling</i> with dr John Turner               |

Key topics and resources have already been prepared by our Consultants, reviewed with OSU staff and sent the Institutes. (information about key topics and consultants in Appendix 3.0)

The faculty of each Institute have worked on teaching outlines and will present them to the OSU staff and consultants next quarter.

#### **4.0 Support Institute Leadership**

In this section we present the separate activities of each Institute. This includes their reports to us as well as the information we gained while visiting Poland.

## **BIALYSTOK**

During this quarter, the Białystok Institute concentrated its activities mainly on establishing satellite offices, long term planning and promoting the program. The Institute provided 970 hours of training. They also delivered 106 hours of consulting to bankers and business managers.

They organized the following courses:

- 3 Tax Courses for 110 persons - 880 hours
- Free seminar on ownership transformation for 15 persons - 90 hours

The basic courses (management, finance, marketing, entrepreneurship, strategic planning, import/export) are scheduled to be run next quarter - October, November 93. Seminars will be free of charge for the participants but courses will be paid (detailed schedule in Appendix 4.0)

The Institute changed its location as they needed more rooms for their activities. The new address is: Krakowska str. 5 Białystok; phone# 236-21 ex. 56.

They promoted the basic courses in a local radio and newspapers - *Kurier Poranny* and *Gazeta Wyborcza*. (see Appendix 4.0)

They established 3 satellite offices in Suwałki, Bielsk Podlaski and Łomża which will offer the Institutes' courses on weekends and other courses/seminars set up appropriate in these areas. (more details in Appendix 2.0)

The OSU staff assisted the Institutes in developing strategic plans that included a formalized look at operations in the next 3-5 years. (more detailed financial plans and estimated income for 1994-1995 in Appendix 4.0)

## POZNAŃ

During this quarter the Poznań Institute provided 301 hours of lectures by the faculty from the Institute. The topics of the lectures were: "Competitive Personnel Selection in Small Companies" and "Exchange Bill in Economic Turnover".

The Institute organized training for public works leaders (25 people), English language courses and one day course for executives. They planned to offer computer courses as 3000 students applied for them.

The Institute developed a relationship with Poznań Labor Office which established a Center to support the unemployed and teach them how to create a small business. Lectures provided for the Center promoted participation in the Institute's training.

The Institute is a shareholder in the Poznań Incubator - the Regional Office provided a building, another foundation provided money and the Institute was to write a business plan.

The main courses were advertised in the most popular daily *Gazeta Wyborcza*.

The Director of the Institute enlarged the advisory committee (in addition to two coordinators).

The faculty of the Institute were asked to assist in writing a book for entrepreneurs to learn how to appraise a small business. The Institute with 4 Banks sponsored an Information Book published by the city of Poznań.

The Institute joined the Association of Organizers of Innovation and Entrepreneurship Centers in Poland. The program of the Association includes:

- cooperation with other governmental bodies involving in supporting small and medium sized companies,
- organization of entrepreneurship training
- establishing contacts with financial institutions and banks
- preparation of programs aimed at entrepreneurship assistance
- inspiring research on entrepreneurship

The Institute spent a lot of time on establishing new satellite offices in Konin, Gniezno and Zielona Góra. The Institute concluded agreements with local institutions (e.g. Regional Labor Office) about cooperation in the realm of organizing and completing training and courses for representatives of small business, state companies' executives and personnel of all levels.

## **RZESZÓW**

During this quarter the Rzeszów Institute provided 1340 hours of training and 500 hours of consulting. This included basic courses on finance, marketing, computers in Rzeszów Kolbuszowa, Łańcut, Strzyżów, Leżajsk.

During August and September, they organized 2 faculty training meetings for new teachers and participated in 3 meetings with entrepreneurs.

The Institute established a Consulting and Research Agency which conducted a feasibility study for a construction company.

The coordinators were busy establishing satellite offices in Przemyśl, Tarnobrzeg and Sanok.

The Institute organized a lecture on entrepreneurship for students from the College of Arts (free of charge).

The Institute was invited to participate in community development activities such as:

- meetings with local organizations to establish cooperation and organize courses,
- a meeting with the Prime Minister Ms Hanna Suchocka in Przecław near Mielec and Minister for Integration with EC Mr J. Krzysztof Bielecki,
- a conference on Regional Development in Poland in September,
- creation of Regional Business Exchange. The Director of the Institute was elected a member of Quotation Exchange Committee. (see Appendix 4.0)

## **5.0 Maintain Task Force**

A Task Force meeting was held in Warsaw, September 29, 1993. Thirteen different organizations were represented in addition to the Solidarity Economic Foundation and three Enterprise Institutes. The participants indicated that there was a need for building local networks among institutions, organizations and universities delivering variety of training courses for small businesses. Information about different programs available might help the Institutes to prepare new strategies for their development. The agenda for the meeting and a list of participants can be found in Appendix 5.

## **6.0. Polish Scholars Visit U.S.**

The purpose of this year's visit of Polish Scholars in U.S. was to provide a two-week opportunity to update the Institute coordinators' plans related to their basic activities and new seminars' programs, to make plans for the whole year activities as well as for their future activities (3-5 year planning) and participate in one-two day internship with small business owners in the Columbus area.

The Scholars attended the International Council for Small Business annual conference in Las Vegas, on June 20-22, 1993. The conference showed them the role of small business in the economy of the whole world as well as trends in small business management in the U.S. They learned how to establish a network of small business institutes what would help them to create their own networks in their local regions.

After the conference they met with CETE staff and OSU consultants. (See detailed agenda in Appendix 6)

While in Columbus the scholars participated in the following activities:

- 1/ visited small business companies and Bank One in Columbus which were chosen based on their suggestions made during our last meeting in Poland. We organized the internships with small business owners which gave them the opportunity to experience a day in the life of an American small business enterprise;

- 2/ *worked on developing six new seminars: *selling, team building, retail management, negotiations, market research and human resource management*; they were assisted by the OSU consultants who gave them one-hour presentation on defined topics;*
- 3/ *prepared strategies for developing the six new seminars and defining the role of American consultants in the process of preparing the seminars;*
- 4/ *reviewed their business plans with CETE staff and projected their potentials for 3-5 years in future;*
- 5/ *developed new questionnaires for faculty and business owners;*
- 6/ *made schedules for Year III - calendar of activities. (see Appendix 6.0)*

At the end of the visit, the Polish coordinators were asked to give us an evaluation of their 2-week stay in the U.S. They seemed to enjoy the entire trip, especially participation in ICSB conference and presentations on new seminars at CETE.

#### **7.0. Develop Case Studies of Polish Entrepreneurs**

Each Institute was assigned to develop 6 Polish cases to share with the faculty of other Institutes. Topics of the cases would be selected by the Institute and shared with other Institutes during the next coordinators' meeting.

Solidarity continued to work with each of the Institutes to coordinate the case-writing responsibilities.

#### **8.0. Conduct Faculty Upgrading Workshops**

We scheduled 6 faculty meetings which would start next quarter. During those meetings the faculty of each Institute from Poznań, Białystok and Rzeszów will discuss the courses which they teach. We will meet one time on Entrepreneurship, another on Finance, Marketing etc., (detailed program in the end of the report)

The coordinators recruited potential trainers from university trainers. New 14 hired and experienced faculty were trained by the coordinators on a regular basis. This year they decided to hire more young teachers who seemed to be more committed to the program of the Institute.

Each Institutes will be assisted by the American consultant dr John Turner to upgrade the skills of the faculty to provide training courses for small business owners (dr J. Turner is going to Poland January-March 1994).

The first faculty training was scheduled for November (18-19) in Bialystok and would be addressed to the finance faculty.

#### **9.0. Conduct Polish National Conference**

No contents for this section this quarter.

#### **SUMMARY**

We started the first quarter of the Year III of the project with a strong feeling that we would be able to encourage the coordinators to take more responsibility for activities planned together and their own programs development while OSU staff and Solidarity Foundation act as advisors.

## FINANCIAL REPORT

The CETE portion of the financial report was prepared by The Ohio State University Research Foundation (OSURF) and is found in Section 10.0.

The CETE budget to date is as follows;

<b><u>Budget:</u></b>		<b><u>\$ 2,937,897</u></b>
Year I	\$1,299,933	
Year II	977,198	
Year III	660,766	
<b><u>Expenses:</u></b>		<b><u>\$ 2,563,835</u></b>
Year I:	\$1,460,242	
First Quarter	\$ 356,040	
Second Quarter	351,314	
Third Quarter	354,155	
Fourth Quarter	398,733	
Year II:	\$ 812,835	
First Quarter	\$ 254,489	
Second Quarter	292,966	
Third Quarter	167,264	
Fourth Quarter	98,116	
Year III:		
First Quarter	\$ 290,758	
<b><u>Balance:</u></b>		<b><u>\$ 374,062</u></b>

**The Solidarity Foundation subcontract report for the same period is as follows:**

**Income:** **\$ 977.000**

Year I	\$ 376,000
Year II	\$ 282,000
Year III	\$ 319,000

**Expenses:** **\$ 719,959**

Year I: \$ 365,080

First Quarter	\$ 30,513
Second Quarter	\$ 68,860
Third Quarter	\$ 155,171
Fourth Quarter	\$ 110,456

Year II: \$ 282,000

First Quarter	\$ 57,140
Second Quarter	\$ 65,122
Third Quarter	\$ 56,818
Fourth Quarter	\$ 102,920

Year III:

First Quarter	\$ 72,959
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**Balance:** **\$ 257,041**



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**FINANCIAL REPORT**

1. Staff - salaries	2 400 USD
2. Managerial Centers	52 500 USD
3. Per diem for US trip	4 295 USD
4. Airfare for US trip	12 929 USD
5. Local travel:	
- for US trip	250 USD
- other trips	325 USD
6. Materials purchase	110 USD
7. Others (DHL, mail, faxes. phones)	150 USD
Total	<hr/> 72 959 USD

*Alicja Juraszewska*

## **ENTREPRENEURSHIP INSTITUTES IN POLAND**

**Ninth Quarterly Report, July-September, 1993**

### **ACTIVITIES OF THE OSU FACULTY AND CONSULTANTS**

- Weekly phone calls to Solidarity Foundation to solve problems/make plans
- Provide technical assistance to the three Institutes
- Assist in developing six new seminars
- Meet with the OSU consultants
- Participate in Task Force Meeting in Warsaw
- Meet with counterpart staff in Gdańsk
- Meet with site coordinators to improve plans for future activities made during their visit at the OSU in June, 1993
- Meet with the U.S. AID Program Office in Warsaw
- Submit deliverables to AID
- Process expense reports
- Write report for the last quarter of Year II plus an annual summary.

## **ACTIVITIES OF THE SOLIDARITY COUNTERPART IN POLAND**

- **Make weekly calls to three Institutes, check project status**
- **Supervise Institute budgets and transfer money monthly**
- **Provide information for quarterly reports to the OSU**
- **Send monthly report to the OSU**
- **Coordinate activities of Task Force meeting and invite participants**
- **Supervise a meeting with coordinators in Warsaw**
- **Organize travel for the OSU faculty**
- **Publicity activities - participant in a seminar at Błażejewko/Poznań to promote the program**
- **Coordinate case study development**

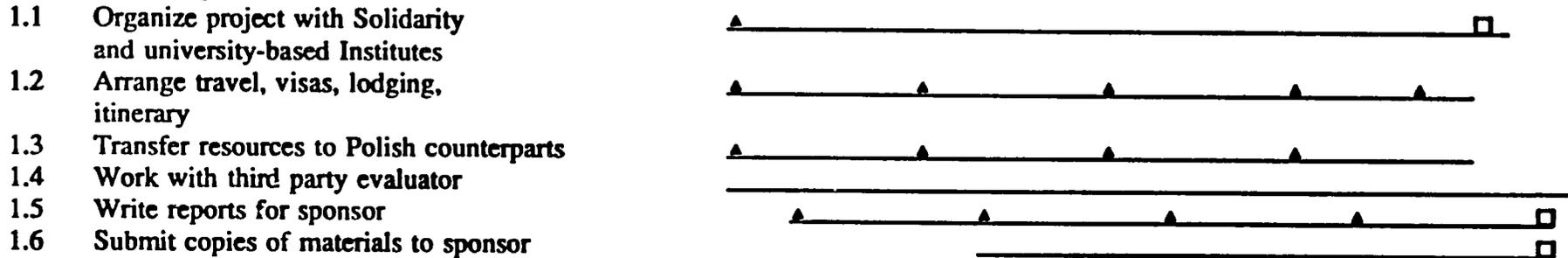
## **ACTIVITIES OF THREE ENTERPRISE INSTITUTES**

- **Submit monthly reports and budget requests to the Solidarity Foundation**
- **Manage the Institutes' budgets**
- **Write a strategic plan for the Institute**
- **Participate in the Task Force meeting in Warsaw**
- **Meet with coordinators from three sites to share achievements gained during the last quarter and to develop plans for year III**
- **Establish satellite sites**
- **Schedule courses for satellite sites and primary location**
- **Promote the program**
- **Preparing new seminars**
- **Collect available training materials**
- **Supervise faculty members**
- **Set up equipment**
- **Work on entrepreneur case studies**

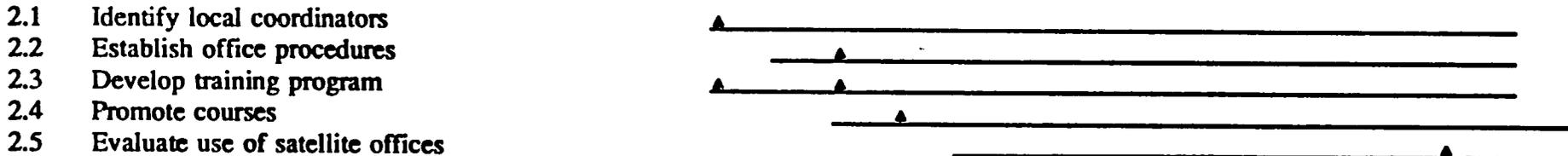
**Baseline Management Plan  
Continuation for Year III**

J J A S O N D J F M A M J J  
1993 1994

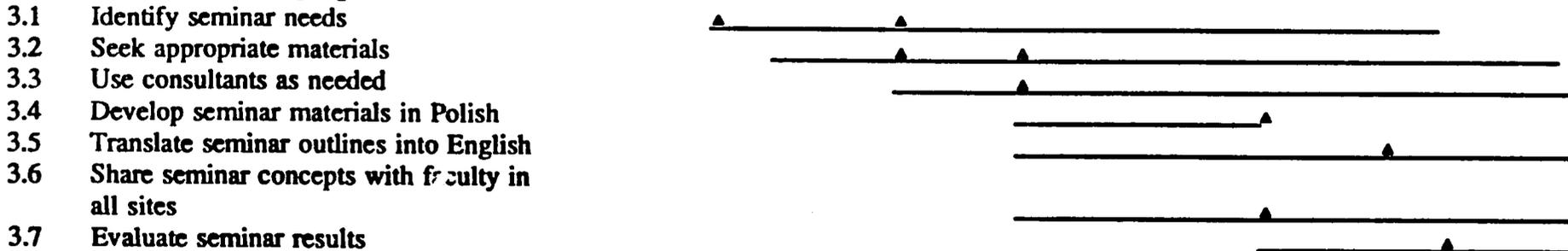
**1.0 Coordinate Program**



**2.0 Establish Satellite Offices**



**3.0 Assist Faculty in Developing New Seminars**



**Baseline Management Plan  
Continuation for Year III**

J J A S O N D J F M A M J J  
1993 1994

**4.0 Support Institute Leadership**

- 4.1 Visit institutes 
- 4.2 Assist in long term planning, strategic plans 
- 4.3 Encourage participation in community development 
- 4.4 Report activities of each institute 

**5.0 Maintain Task Force**

- 5.1 Update membership based on organizational changes 
- 5.2 Conduct meetings 
- 5.3 Identify other sources of funding 

**6.0 Polish Scholars Visit U.S.**

- 6.1 Plan program 
- 6.2 Arrange travel 
- 6.3 Evaluate outcomes 

**7.0 Develop Case Studies of Polish Entrepreneurs**

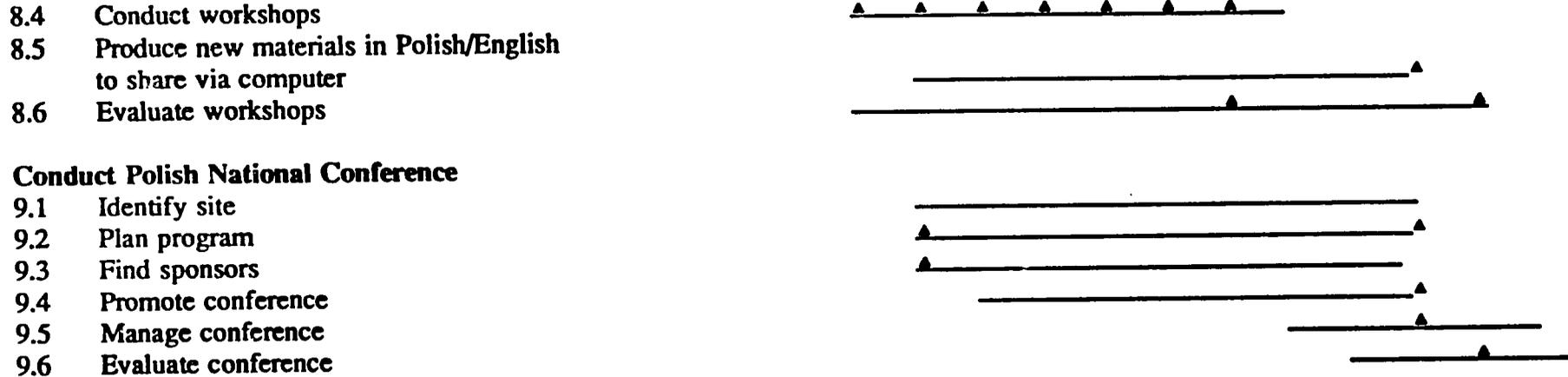
- 7.1 Identify successful entrepreneurs 
- 7.2 Plan topics to be addressed 
- 7.3 Write cases in English and Polish 
- 7.4 Arrange for publication 

**8.0 Conduct Faculty Upgrading Workshops**

- 8.1 Schedule workshops 
- 8.2 Obtain necessary materials 
- 8.3 Schedule consultants 

**Baseline Management Plan  
Continuation for Year III**

J J A S O N D J F M A M J J  
1993 1994



**Dates: Polish scholars visit U.S. - June 18-30, 1993**

**Faculty training seminars offered for one week by topic - September-December, 1993**

**Site visits - September, December, February and May**

**National conference - May, 1994**

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**APPENDIX**

**0.0**

**BACKGROUND**

## PARLIAMENTARY ELECTIONS

# One-Two Punch For the Left

*Two conservative parties come out on top, and the seat-grab in the Sejm begins in earnest.*

Polish politics swung sharply to the left after the September 19 parliamentary election. The Democratic Left Alliance (SLD) and the Polish Peasants' Party (PSL), groups with communist roots, came only a few seats short of being able to dictate the terms in the next Sejm.

The anti-communist right was left licking its wounds. The Christian Democratic and Liberal parties, which supported the previous reform-minded governments, will not make it into the Sejm, either.

The SLD received votes from almost all categories of voters. The PSL won heavy support from its traditional rural electorate.

The Labor Party (UP), one of the youngest Solidarity-bred parties, also did well. In the previous Sejm, it had only a few deputies. Now it can tip the scales in parliamentary games. With its political image, the UP consolidates the left side of the Sejm.

The Nonpartisan Reform Support Bloc (BBWR) and the Democratic Union (UD) will act as the right's counterbalance, especially in economic matters. The Confederation for an Independent Poland (KPN) will lose much of its parliamentary representation and is expected to act in strong opposition to any formula of the future government.

Most observers say the results of the election do not threaten reforms. The four-year-old reform program is well-entrenched, and talk of liquidating democracy and the free market is finding few listeners.

Still, many political processes can grind to a halt. Much hinges on what the new government will look like.

At the moment, a leftist government coalition seems probable. Still, on election night SLD leaders made emphasized that they are interested in a stable government based on a wide coalition with other parties, including the



Ex and future prime minister? Pawlak (center) and other "peasants" wait out the elections

Democratic Union and current prime minister Hanna Suchocka. But one day after the election, both the UD presidium and Suchocka ruled out the possibility of forming a government with the SLD.

The UD, until now the most influential post-Solidarity party, is far from enthralled with the SLD's communist background. One UD leader, Andrzej Celiński, said the right's political program was tried and tested during its stint in office, so now the left has to give its program the tough test of practice.

On election night, some SLD leaders seemed to buckle at the prospects of leading the next coalition. "It would be a dream-of situation," said one, "to remain in opposition with more than a third of the Sejm's make-up." At any rate, members within the SLD

hold that the party should prepare to govern the country regardless of the coalition.

Talks between the natural allies in the left camp have already started on the composition of the Sejm presidium. An SLD leader will likely become Sejm Speaker, with SLD and UP politicians becoming deputy speakers. The Democratic Union rejected an invitation to participate in the preliminary haggling.

Numerous meetings between SLD and PSL politicians indicate that the two parties will be the pillars of the governing coalition. Such an alliance is natural not only because of the two parties'

similar platforms, but because of parliamentary arithmetics as well. If they link up, the SLD and PSL will have an overwhelming majority in the house and can virtual dictate the constitution.

The SLD, paradoxically, will be the liberal wing of this marriage. Its leaders promised after the election that they would strive toward quick integration with the EC, and discussed possible Polish membership in NATO, saying they only have to take a closer look at the terms on which Poland's potential membership in the pact would be based.

The SLD also promised not to increase already high tax burdens, but it ducked skirted about its budget deficit and inflation game plan. It did not rule out personal reshuffles in the National Bank of Poland (NBP), the caretaker of the zloty.

One of the SLD's priorities will be to pass a new constitution, possibly removing the Senate and trying to curtail the president's powers.

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## IFC FINANCING IN 1993

# Double the Dollars For Poland

*Its net income has dropped, but the IFC is still generous to Poland.*

The International Finance Corporation (IFC) approved a record 2.1 billion dollars in financing for 85 private sector projects in 54 developing countries in its fiscal year ended June 30, 1993, according to the IFC's annual report. The report, released last week, said last year's spending represents a 20 percent increase over the amount of financing approved in the previous fiscal year.

Equity and quasi-equity investments, at 519 million dollars, represented 24 percent of the financing in 1993. The total cost of the 185 projects approved in 1993 will be about 17 billion dollars. For every dollar that IFC invests for its own account, it mobilizes over 7 dollars from other financial sources. IFC's loan syndications program, its main form of direct mobilization, approved a record 1.8 billion dollars.

"The strong growth of IFC's investments reflects the vigor of private enterprise in much of the developing world," said Sir William Rylie, IFC's executive vice president. "The demand for IFC finance and services now considerably exceeds the corporation's ability to supply, as more governments in emerging markets look to the private sector to drive economic growth and adopt policies that allow market forces to work."

IFC's net income declined to 142 million dollars from 180 million dollars in fiscal year 1992. Lower short-term interest rates reduced the returns on the liquid asset portfolio to 133 million dollars from 156 million dollars in 1992. According to IFC's annual report, war and economic and



250 million dollars for Poland: Damianos

political uncertainty in the former Yugoslavia and some African countries, and a slower-than-anticipated rebound in Turkey's tourism industry (in which IFC invested 130 million dollars in 1986-1990) lowered the income from the loan portfolio to 320 million dollars, compared with 343 million dollars in 1992. IFC's equity portfolio, however, continued to perform strongly, generating income of 155 million dollars.

"We are very pleased with our performance in Poland last year. In the 1993 financial year, we recorded a double increase in the value of the projects approved, compared to previous years. The value of IFC investment already carried out and approved in Poland is close to 230 million dollars," said Damianos, IFC resident representative in Warsaw. In 1993 the corporation approved financing for four projects in Poland, including the construction of Poland's first float

glass plant by a joint venture between Pilkington (UK) and Poland's biggest sheet glass manufacturer, Huta Sandomierz. In the venture, called Pilkir-ton-Sandoglas, IFC has purchased 15 percent of the stock for 8.2 million dollars. Additionally, it will provide a 40.3-million-zloty loan from its own funds plus another 23.6 million dollars in syndication with commercial banks. Another large project (39 million dollars commitment) involves the modernization of a newly privatized manufacturer of specialty and alloy steel, Huta Luccini Warszawa Sp. z o.o., with the majority stake owned by Luccini (Italy).

In all, 27 projects are being carried out from IFC funds in Poland, including 14 through a credit line for small and medium-sized enterprises, launched in cooperation with Bank Rozwoju Eksportu. In addition to projects, IFC has also become involved in two capital funds: Private Equity Fund of Poland and New Europe East Investment Fund. Damianos said preparations are underway to open a new short-term credit line for the financing of Polish exports by the International Bank in Poland and the Bank Rozwoju Eksportu.

As IFC's experience around the world shows, demand for the financing of investment in infrastructure is on the rise among developing countries. Newly

democratic states do not have enough money to finance the development of power generation, telecommunications, the road network, and environmental protection. But in order to reach for IFC funds, these sectors must be privatized at least partially. Damianos says that in Poland it is possible to observe progress. Recently the IFC approved the co-financing of construction of Poland's first independent telecommunications network in Pila. An optic fiber digital network for 100,000 residents will be built by a company of districts in Pila province, the State Treasury and R.P. Telekom (a Polish-American joint venture). The IFC will finance almost 50 percent of this 80-million-dollar project. There are plans to start a similar project for the Silesia region. Damianos also confirmed that IFC is interested in helping finance construction of Poland's highway network.

For several months, IFC has included some countries born out of the former Soviet Union: Russia, Ukraine, Belarus, Lithuania and Estonia. Damianos admitted that in these countries especially, demand for investment in infrastructure will be considerable. However, the sectors in those countries are still dominated by state ownership, so some time will have to pass before IFC funds will start to funnel to these countries. Damianos said that Poland does not have to fear that IFC's involvement will be smaller now that the former Soviet republics are competing for the corporation's limited funds. "You have 150 countries to compete with you for corporation investment. The most important thing is the ability of a given country to absorb credits," Damianos said. He said it is possible to expect that as economic reform progresses, the importance of IFC financing for Poland will be reduced, as Poland comes to count on regular credits from commercial banks.

Magda Sowińska

#### IFC FACTS

IFC is the private sector arm of the World Bank and the largest multilateral source of financing for private sector projects in developing countries. Poland joined the IFC in December 1987, taking a 5.1-million dollar capital stake, and it has 0.37 percent of total voting power. Since 1990, an IFC representative office has operated in Warsaw.

## GOPLANA PRIVATIZATION

# Sweet and Sour Dealing

*Though two buyers want in on the Poznań candy giant, the company itself has reservations.*

After Wedel and Wawel, Poznań's Goplana is the third largest confectionery firm aiming to privatize. Goplana has worked out a way to do this by entering into a joint venture with the British firm Man, which is ready to pay 15 million dollars for 47 percent of the shares. Earlier Pepsico bought 40 percent of Wedel's stock, while Wawel is an employee-owned company.

"We need privatization like water and air," says Janusz Rutkowski, Goplana's director. Goplana took its first steps in this direction as early as two years ago. Both the management and crew concluded that the best method of transformation would be to liquidate the existing company and jointly set up a new company with the British. "There would be a new entity created, Goplana Ltd., into which we would bring the firm's assets," explains Rutkowski. The crew did not approve of capital privatization, afraid that the plant might go to a chance buyer or a confectionery competitor.

"The purpose of privatizing the plant is to stay on the market. This is possible only with a considerable investment of some 10 billion zlotys, and Goplana doesn't have that kind of money," continues Rutkowski. He maintains that Man has already designated money in the Polish bank for the purchase of the technology lines and awaits only a signed joint-

venture contract. Man handles about one third of world cocoa trade and also trades sugar and tea. So far the company has not invested in Poland. According to Rutkowski, dozens of prospective foreign customers were looking at Goplana, but the British company was eventually selected on the basis of social benefits, an 18-month period without pink slips, a one third pay raise and, most importantly, the promise to immediately invest more than 30 million dollars in Goplana's modernization. A joint Goplana and Man company, Goman, has been setting up a national distribution network for the past two years and has won itself 6,500 regular customers.

Last December Goplana signed a letter of intent with Man. The application for creation of a joint venture landed in the Privatization Ministry in early July. It has received the support of the crew and the province chief, who is the founding body of the firm. In the company to be, the crew will receive 6 percent of the shares for free and 47 percent will remain State Treasury property. The balance will be held by Man. "I think that the State Treasury's shares will surely be offered on the exchange," says Rutkowski. Last spring, following problems with Wedel's privatization, Privatization Minister Janusz Lewandowski declared to parliament that he would not interfere with Goplana's privatization. "Goplana will simply go on

## GOPLANA FACTS

Goplana is 80 years old and has plants in Poznań, Leszno, Kargowa and Sulechów. Together these four plants employ 2,300 people. Last year Goplana's volume of business was 1.12 trillion zlotys. The firm holds a 10-12 percent share of the domestic confectionery market.

Goplana has no outstanding debts, its only liabilities being unpaid floating credits. The firm produces candy, boxed chocolates and chocolate wafers. For a short time it has been producing halvah, which formerly only Wedel produced in Poland, and in September it will open a special peanut line. Most of its products are sold domestically.

an exclusivity basis, without any bidding, on the local initiative, and we won't meddle with it."

Since that time the situation has changed somewhat and the Ministry's assurances are no longer 100 percent reliable. Goplana's privatization gained notoriety in mid-August when the Swiss firm Nestle unexpectedly expressed interest in buying the firm. Nestle initially proposed buying 80 percent of the stock for 40 million U.S. dollars. Goplana would become a company held in trust by the State Treasury and then, as was the case with Wedel, the best offer would be chosen. Thus it would be capital privatization.

Nestle, like Man, ensures 18-month employment, pay raises of at least 33-percent, 20 percent of the shares for the crew and a declared investment of 30 million dollars. Their offer doesn't mention social benefits. The employees and management of the Poznań factory rejected Nestle's offer. "First, it is very much belated. Secondly, we don't know Nestle's intentions, and we don't want Goplana to become just a packaging facility or a storehouse for the Swiss concern," Rutkowski said. The ultimate decision on the mode of privatization rests with Lewandowski.

**Dariusz Styczek**

# Optimistic report from Poland:

## Veteran analyst describes changes, investment opportunities

by Stan Paliwoda

*Stan Paliwoda is a marketing professor at the University of Calgary, Alberta, Canada, and visiting professor at the Canadian-Polish Management Centre of the Warsaw School of Economics, Poland.*

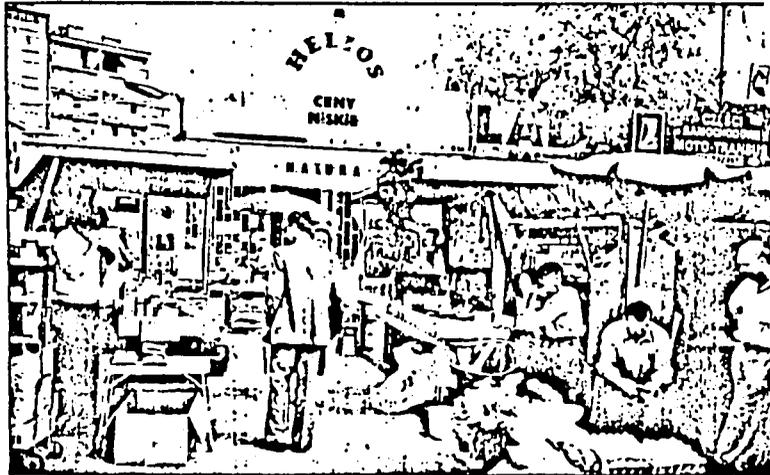
**Business opportunities now abound in Poland.**

I've been visiting Poland since 1976, and never has the change been so vast as in the past 12 months. Poland is stable, its currency is convertible, and though it has inflation of about 40% annually, the rate is manageable and relatively low compared with the rest of Central Europe.

Street names that had anything remotely to do with the former regime have been changed over the last year. Anything to do with October Revolution, Red Army, or communism has been relegated to memory.

Investment is everywhere. Small kiosks have sprung up like mushrooms all over and even compete in the lines which they sell. Poles do not have freezers, and so the idea of weekly grocery shopping by car is unknown. Instead, Poles still shop often and for small quantities. Everything is now available at a price.

The press has played up the arrival of IKEA and Benetton in Warsaw, but remember that while Poland is doing relatively well alongside her neighbors, the monthly wage still is



of specially equipped vehicles. Private enterprise has spread throughout the retail sector, and the bulk of the working population (56%) is now working in the private sector. Private shops coexist alongside state shops, which now usually are closed, being renovated, or up for sale.

The most incredible phenomenon has been the growth of the kiosks. They are prefabricated metal or reinforced plastic and offer an impressive range of goods from fruit and vegetables to toiletries, shoes, clothes, glassware, and periodicals to fresh meat, washing machines, domestic electrical equipment, and furniture. It is all to be found outside. The choice may be limited, but it is available.

Official statistics reveal that more than 1.5 million small enterprises

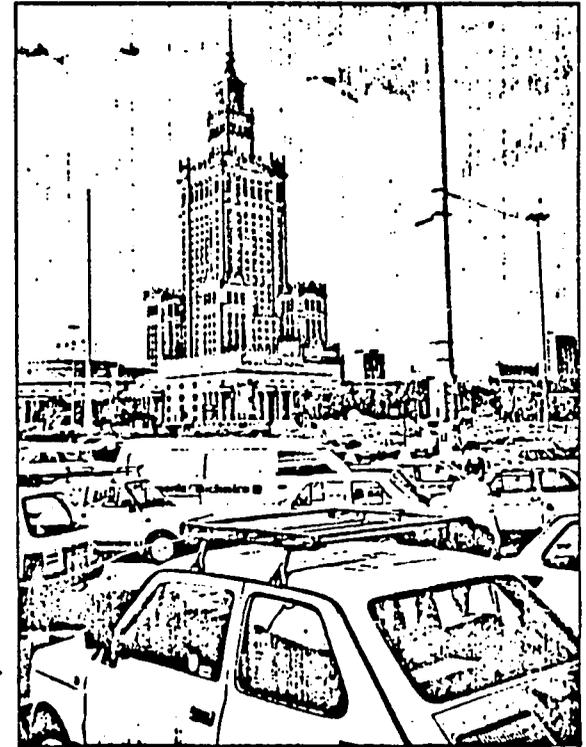
dark red and cream now display ads for Technics, Panasonic, or M&Ms. Restaurants and bars have tables and chairs on the sidewalk. Altogether, Poland is a much brighter, more cheerful place than before.

Women were always reasonably well-dressed, but there has been a marked improvement in the dress for men. Previously, Polish men used to look as though they were wearing suits that they had been wearing in the rain and had shrunk on them. It was grunge tailoring before it became fashionable to wear something that looked not just lived-in but slept-in.

Quality Italian suits are a very popular item right now. Conventions such as knotting your tie so that it stops halfway up your chest have also disappeared.



*The economic climate in Poland has changed dramatically since the fall of communism. Most significant is the proliferation of kiosks, whether on street corners (above) or grouped in a large market like this one in Warsaw (left). Kiosk vendors sell fruit, meat, and even washing machines. A reminder of Poland's past is Stalin's "gift," the Palace of Culture, with the legendary Polski Fiats parked in the foreground.*



AT&T satellite network. Satellite dishes are to be found on the outside of some of the blackest of apartment buildings, the white dish being in

munists often rewrote history to their own ends.

One point to note is that although quantity is low, quality is high, and the

only around \$300 per month (in Russia it is around \$15). This will not buy many Benetton sweaters.

## Affluent group

However, many designer shops such as Dior also are to be found in the fashionable Nowy Swiat, for there is a small but very affluent group of people in Warsaw. The car dealerships for BMW and Mercedes are a testimony to this.

Two years ago, Da Elio established the first Italian pizzeria in Warsaw to offer a home delivery through the use

have been registered in the last 18 months. This is an impressive figure, but inaccurate. For one thing, registration does not mean active participation in business. For another, registration may make you liable for taxation including the value added tax, introduced in July at 20%. Apart from cutting profit margins, it will also inflate selling prices, and Poles are only just learning the ropes as to what it takes to remain competitive.

Established Western brands are to be found everywhere in Poland now. Streetcars that used to be painted only

## Phone progress

There has been substantial progress in telecommunications. Warsaw now has a cellular telephone network, and AT&T is now receiving competition from the Polish telephone network. Previously, international calls had to be booked in advance unless you happened to be staying in a very expensive hotel.

Today it is possible to make calls from a residential telephone in Warsaw that looks like something out of a Hitchcock movie, but which rivals the

sharp contrast to the black wall on which it is mounted.

As far as lodging, Warsaw has spawned a large number of quality hotels in the last 18 months, the latest being the Hotel Bristol. If anyone is looking for a gap in the hotel market, it is in the inexpensive two-star range. Orbis hotels continue to operate, unfortunately, but they have a large number of established Western competitors.

Transportation is another interesting area. Buying a train ticket still involves a wait of about 40 minutes in a queue that does not move, and so you can expect to be harangued several times by beggars, some carrying medical certificates that they have AIDS.

Once at the ticket counter, you realize why it takes the ticket clerk so long. You have to state where you are going, which class you are traveling, when and what time you are traveling, and exactly the same for the return.

Specific seat reservations are issued with the tickets. First class is particularly comfortable, with new carriages now in operation, and I received complementary soft drinks and a candy bar during the ride. Looking out the window on a trip from Warsaw to Cracow you notice that the fields look more like extended vegetable gardens than farms.

## Agricultural woes

Polish agriculture is faced with terrible problems. Look out of a train window and you see generations of families working in the fields with almost nothing in the way of machinery.

Democratization has hit hard the most ardent supporters of the process, the peasant farmers, who have for generations tilled the land. Now their very future is uncertain. It used to be said in Poland that "only the future is certain, the past is always changing." That was a reference to how the Com-

lack of industrial fertilizers means a reliance on organically grown products.

What else is new? In Warsaw at least, most traditional restaurants have given way to fast-food outlets and pizzerias. Polish *bigos* (sausage and saurkraut) is now found in Pizza Hut! A few blocks away are two McDonald's restaurants and a rival opening soon underneath the Smyk children's store.

The whole look of the place has changed just with brighter, more attractive looking shops, new bus shelters, advertising, and tables and chairs on the sidewalk so you can stop for tea, coffee, or a beer. Last year, Stalin's (unwanted) gift to the Polish people, the Palace of Culture, which dominates the Warsaw skyline had a very large advertising sign for Digital on two sides of the very top of the building, until the cost of that particular outdoor sign increased too suddenly for private enterprise to accept.

In regard to grocery shopping, it is interesting to watch shoppers and how they behave. They are unsure of packaged goods on supermarket shelves; a number of packages lie opened because customers wanted to see the contents before buying.

Poland's leaders are being urged to press ahead with much-needed reform in privatization. Over 800 state enterprises have been privatized by liquidation, and through liquidation and joint ventures most change now will take place.

The problem after all is not just to change the ownership of state enterprises, but to ensure the introduction of new technology and new capital.

The American Polish Enterprise Fund has been instrumental in developing the small-business sector and creating a market dynamic. There are many places for investors to go—without risks, but Poland has the mindset to prevail. ■



**APPENDIX**

**1.0**

**COORDINATE  
PROGRAM**



# Central Connecticut State University

A Campus of the Connecticut State University

1615 Stanley Street P.O.Box 4010 • New Britain, CT 06050-4010

August 10, 1993

M. Catherine Ashmore, Director  
International Enterprise Academy  
Center on Education and Training for Employment  
1900 Kenney Road  
Columbus, Ohio 43210-1090

Dear Ms. Ashmore,

Zdzislaw and I were very glad to meet you in Budapest and to have the chance to discuss our various activities in Poland. We still have not received an official grant Amendment for this year. However, in brief, we expect to work with the politechnik in Poznan, the mining university in Krakow, and the engineering colleges in Opole and Zielona Gora with funding from our Center for Excellence grant. We do not work in Jalena Gora. We have included a number of people from Jelenia Gora in our projects the past two years and will teach a series of short courses in western business there next Spring as well as in Walbrzych and Legnica, the other provinces in Lower Silesia.

Our mission in both the Center for Excellence and program continuation activities is to establish The Technical University as a first-class resource for Poland in management and market economics training, especially in the areas of non-credit short courses and workshops of a practical nature. In addition, we will establish master's programs in business and in organizational and managerial communication at The Technical University. We hope that The Technical University Center develops as the hub of a larger network of politechniks and engineering colleges offering management and market economics programs for post-graduate students, adult learners and others in their environs.

Thus, if as I understand it OSU is focusing on small business development centers, I see no overlap in what we are both doing. In fact, I think there may be a number of ways in which we can supplement and reinforce each other. Once our Amendment is official, I hope you and I can discuss this.

I thank you for your kind words on our Center for Excellence grant. We share your commitment to assisting Polish people in adopting a market-driven system. We wish you continued success in your work.

With kind regards,

Sincerely,

Henry S. Enck  
Executive Assistant to the President  
for International Development

HSE/sp  
cc: Professor Kremens



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1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

August 3, 1993

Henry S. Enck  
Executive Assistant to the President  
Connecticut State University  
New Britain, CT. 06050

Dear Buddy:

Congratulations on winning the competition for a Center of Excellence in Poland this year. As we discussed, we would appreciate the opportunity to know more about your plans. You mentioned that you were also expanding the program into Poznan and Jalena Gora where we are also working. It would be good to understand your mission so that we don't confuse the people we are working with in the same places.

Enclosed is the text that we have available for business start-up programs through the Solidarity Economic Foundation. It was our first attempt at providing materials for use in the Polish language, and was an interesting learning experience. Additional copies are available through the Solidarity Economic Foundation in Gdansk. Please contact Alicjz Zajaczkowska, Fundacja Gospodarcza NSZZ Solidarnosc, Waly Piastowskie 24, 80-855 Gdansk, Poland (48-58-384319).

It was good to finally meet you and Zdzislaw Kremens in Budapest. Although the meeting was a bit short, it did give us a chance to know a bit more about each of the projects. Please let us know if there are any events that we could share with our various groups, and do plan to join us for the FORUM in Gdynia next May.

Sincerely,

M. Catherine Ashmore  
Director, International Enterprise Academy

## **COORDINATORS MEETING AGENDA**

**September 28, 1993, Warsaw**

1. Accomplishments - July-September, 1993
2. Faculty (year 1, year 2, year 3)
3. Satellites
4. Schedule of courses
5. Cases (types of cases needed for Program based on what we have already had)
6. New seminars:
  - overview of consultants status - Elżbieta Jacowicz
  - Team Building seminar (prof, Janina Latack) - Adam Góral
  - Negotiations seminar (prof. Roy Lewicki) - Bogusław Plawgo
  - Retail Management seminar (prof. Wayne Talarzyk) - Zdzisław Krajewski
  - Marketing Research seminar - Lukasz Pawelczak
  - Selling seminar (John Turner) - Krzysztof Kaszuba
  - Human Resource Management (John Turner) - Andrzej Jurgilewicz
  - materials
  - trainnigs schedule
7. Faculty Training Meetings
8. Strategic Plans
9. Reports
10. John Turner in Poland
11. National Conference
12. Task Force meeting
13. Local Task Force meeting
14. Review a calendar

A list of The POLISH INSTITUTES' COORDINATORS

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**(SOLIDARITY FOUNDATION in Gdańsk)**

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44-78

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home #: 48-58-32-14-85

• ***Alicja Unterschuetz***

Oskara Kolberga 4C/32; Sopot

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• ***Krzysztof Kaszuba***

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Stoleczna 15a/9; Białystok

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Winogrody 137/1; Poznań

home #: 48-61-203-456

• ***Zdzisław Krajewski***

Os. Wichrowe Wzgórze 13/135  
61-657 Poznań,

## **POLISH-AMERICAN ENTERPRISE INSTITUTES**

### **CALENDAR OF ACTIVITIES**

#### **JULY 1993**

- Quarterly Reports due - beginning of the month

#### **AUGUST**

- Institutes establish three satellite centers each

#### **SEPTEMBER**

- Group meeting in Warsaw - end of the month
- Case writing responsibilities assigned
- Task Force meeting
- Revised strategic plans due - end of month meeting - Send asap

#### **OCTOBER**

- Institutes prepare outline of new seminar materials to share
- SBA Meeting (12)
- Quarterly Reports due - beginning of the month
- Survey of Faculty Completed (31)
- Export/Import Course Faculty Upgrade Seminar - Rzeszow (14-16)
- Strategic Plans due (31)

#### **NOVEMBER**

- E-mail Number (1)
- Management Course Faculty Upgrade Seminar - Rzeszow (7-9)
- Finance Course Faculty Upgrade Seminar - Bialystok (18-22)
- Survey of Business Owners completed (31)

#### **DECEMBER**

- Strategic Planning Course Faculty Upgrade Seminar - Poznan (9-12)
- Share draft of materials for new seminars, obtain feedback from all Institutes,  
CETE and Solidarnosc staff.
- Coordinators Meeting (14)
- Task Force Meeting (15)
- Mr Koltai team visit Poland (14-15)

## **JANUARY, 1994**

- Marketing Course Faculty Upgrade Seminar - Poznan (13-14)
- Quarterly Reports Due - beginning of month
- Group Meeting in Warsaw
- Task Force meeting
- John Turner arrives in Poland: (Poznan, first 2 weeks)  
(Bialystok, last 2 weeks)

## **FEBRUARY**

- Coordinators Meeting
- Entrepreneurship Course Faculty Upgrading Workshop (27-28)
- John Turner works with Institutes - Rzeszow
- New Seminar Materials completed
- Seminar on Selling (First 2 weeks)

## **MARCH**

- Forum Program Proposals due (1)
- John Turner works with Institutes - Poznan, Bialystok
- New Cases Completed and Translated
- New Seminar Workshops for Faculty scheduled in Bialystok (last 2 weeks)

## **APRIL**

- Quarterly Reports Due - Beginning of Month
- New Seminar Workshops for Faculty scheduled in 3 Institutes (other 3 topics)
- Meeting for planning final FORUM details

## **MAY**

- Entrepreneurship FORUM (15-17)
- Task Force meeting
- New Seminars taught by Institutes

## **JUNE**

- New Seminars Taught
- Final Report Due - end of month
- Case Book published

## PROGRAM

### THE IV CONFERENCE on "THE ROLE OF BUSINESS AND INNOVATION CENTERS IN THE REGIONAL DEVELOPMENT AND PROMOTION OF SMALL AND MEDIUM-SIZED ENTERPRISES", Błażejewko, September 22-25, 1993

organized by:

POLISH BUSINESS AND INNOVATION CENTERS ASSOCIATION AND  
WIELKOPOLSKA BUSINESS AND INNOVATION CENTER

September 22, 1993      Wednesday

8.30 p.m.                      Departure by bus from PKP (Polish Domestic Railroad) Main Train Station  
8.30 p.m.                      Dinner

September 23, 1993      Thursday

Opening  
9.30 a.m.                      Welcome  
Prof. dr hab. Piotr Buczkowski - The President of Regional Council

#### *Morning Session*

10 a.m.                      *The present condition of Innovation and Entrepreneurship Centers in  
Poland. Measures and actions of Polish and Foreign Central Institutions  
in support of promoting entrepreneurship.*

#### Convener:

Krzysztof Zasiadły - President of Polish Entrepreneurship and Innovation  
Centers Association

#### Presenters:

Barbara Listkiewicz, The Ministry of Entrepreneurship Promotion,  
Warsaw; *"Entrepreneurship Promotion in Poland"*

Krzysztof Mika, Ministry of Labor and Social Policy, Warsaw

Jacek Janczewski, Cooperation Fund, Warsaw

Marek Kozak, Polish Agency for Economic Development, Warsaw

Jacek Jettmar, National Economic Chamber, Warsaw

Alicja Zajączkowska, Economic Foundation NSZZ "Solidarność", Gdańsk  
*"Non-government small business organizations"*

Catherine Ashmore, International Enterprise Academy, The Ohio State  
University, U.S.A. *"Entrepreneurship Program for Poland"*

11 a.m.                      Break  
11.30 a.m.                      Discussion  
1.30 p.m.                      Lunch

### *Afternoon Session*

3 p.m. ***Methodology and curriculum of training programs for management team and customers of Entrepreneurship and Innovation Centers***

**Convener:**

prof. dr **Maria Fic**, Pedagogical University, Zielona Góra

**Presenters:**

**Prof. dr hab. Henryk Gawron** *"The basis of preparation and direction of educating candidates working for small businesses"*

**Dr Michał Butkiewicz**, Agency for Small and Medium-Sized Development, Warsaw *"Criteria of professional competencies"*

**Alicja Unterschuetz**, Economic Foundation NSZZ "Solidarność", Gdańsk *"Self-employment competencies education as a part of vocational education in Polish educational system"*

**Dr Elżbieta Raciniewska**, Gdańsk Polytechnic, Gdańsk *"A project of a basic training curriculum: Professional consultant for small and medium-sized businesses"*

**Dr Janusz Majewski**, Academy of Agriculture, Poznań *"Country tourism as an entrepreneurship development program in a country"*

4.30 p.m.	Break
5 p.m.	Discussion
7 p.m.	Dinner
8. p.m.	A cultural event

### **September 24, Friday**

8. a.m. breakfast

### *Morning Session*

9. a.m. ***Managing the Business and Innovation Center. Marketing. Managing the estate.***

**Convener:**

**Krzysztof Kwatera**, Małopolskie Entrepreneurship Development Center, Kraków

**Presenters:**

**Franz Dietrich**, Experplan, Consulting and Planning of Business Innovation Centers, Technology and Science Parks, Munich, Germany *"Preparing a building for Entrepreneurship and Innovation Center and SBDC and Incubator"*

**Krzysztof Kwatara, Małopolskie Entrepreneurship Development Center, Kraków**  
*"An incubator promotion plan"*

**Szymon Różalski, Szczeciń Entrepreneurship Center, "Szczeciń Entrepreneurship Center Experiences"**

**Jerzy Bajorek, Mielecki Entrepreneurship Incubator"**

**Krzysztof Chmura, Urząd Miasta i Gminy Zelów**  
*"Building Development Strategy for Zelów community"*

**Sławomir Urbaniak, Zelowskie Entrepreneurship Center, Zelów**  
*"Economic Development in U.S.A. - a report from a training in the U.S.A"*

**Dr.inż. Jan Mertl, Krzysztof Kucharski, Foundation "Incubator", Łódź**  
*"Cooperation and synergy of small businesses within Incubator - important factors affect economic situation of the business"*

**Uwe Hoppe, Business and Innovation Center, Frankfurt/Oder, Germany**  
*"BIC Experiences in Frankfurt on the Odra"*

11 a.m. Break  
11.30 a.m. Discussion  
1 p.m. Lunch

#### *Afternoon Session*

3 p.m. ***Commercialization and Transfer of Technology: The role of Business and Innovation Centers, Central Administration and Local Government; Financing***

Convener:

Dr inż. Jerzy Sękiewicz, Progress and Business Incubator, Kraków

Presenters:

**Hans-Georg, Tschupke, Zenit Center for Innovation and Technic, Mulheim a.d. Ruhr, Germany** *"Cooperation of private and state sectors"*

**Ronald Dwight, IRIS Project Poland, Warsaw** *"Intellectual ownership in the process of technology commercialization"*

**Adam Tomiczek, CETE - Warsaw Center of New Technology, Warsaw-Celestynów** *"Successful innovations - what needs to be done to commercialize technology successfully"*

**Karol Lityński, Center for Entrepreneurship Development of Warsaw Polytechnic, Warsaw** *"Barriers of technology commercialization at universities based on Warsaw Polytechnic example"*

Dr. inż. **Jan Figwe**, Business, Trade Fairs and Technology Center,  
Gdańsk *"Can science parks exist in Poland"*

**Krzysztof B. Matusiak**, University of Łódź  
*"Institutional support of technology transfer in developed market  
economy"*

4.30 p.m.	Break
5 p.m.	Discussion
7 p.m.	Cocktail
7.30	Dinner

Saturday September 25, 1993

8.00	Breakfast
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*Morning session*      ***Innovation and Business Centers in the Middle and Eastern Europe:  
present conditions; international cooperation network***

Convener:

**Heinz Fiedler**, Association of German Technology and Business  
Incubation Centres, Berlin, R.F.N.

Presenters:

**Peter Nagy**, Entrepreneurial Incubators Association, Budapest, Hungary  
*"Three years of business incubation in Hungary"*

**Dr Siegfried Behrendt**, Oder-Spree Gesellschaft für Standortentwicklung  
und Wirtschaftsordnung, Eisenhuttenstadt, R.F.N. *"Polish-German  
Innovation and Entrepreneurship Center Guben-Zielona Góra"*

**Michail S. Jaworskij**, Lwów Scientific, Technical and Economic  
Information Center, Lwow, Ukraine *"Activities in the scope of  
Incubators, Innovation Centers and Science Parks in Ukraine"*

**Prof. Georgy Mladenov**, Association of Bulgarian Technology Centers  
and Business Incubators, Sofia, Bulgaria *"Development of Bulgarian  
Technological Centers and new forms of businesses"*

**Liudas Jonikas**, Vilnius University, Wilno, Litwa  
*"Current situation in development of technological entrepreneurship in  
Lithuania"*

10.30 a.m.	Break
11 a.m.	Discussion
12 a.m.	Summary. Conclusions. Follow-up.
1 p.m.	Lunch
2 p.m.	Departure by bus to Poznań PKP - a train station



# REGISTRATION FORM

in the conference  
22-25 September, 1993

FIRST NAME .....

LAST NAME .....

DEGREE/TITLE .....

POSITION .....

NAME OF ORGANIZATION .....

.....

ADDRESS .....

COUNTRY .....

PHONE NO .....

TELEX NO .....

FAX NO .....

Business incubators, business & innovation centres, business support centres, and technological centres have been coming into being in Poland since 1990. They are followed by seminars and conferences aimed at disseminating foreign experience and working out original Polish organizational forms and programs; as well as improving the skills of Polish businessmen.

Annual conferences, organized for the past four years, on the operation of business & innovation centres in their variety of forms, and their role in local business development, have already become a tradition.

These conferences are attended by organizers and managers of business incubators and business & innovations centres, representatives of central and local administration, as well as foreign guests.

The participants of the third conference in 1992 have called into being the Polish Business & Innovation Centres Association. This fourth conference is focused primarily on the discussion of practical issues related to business & innovation centres:

- \* setting up and operation,
- \* finding partners,
- \* finances,
- \* technology transfer,
- \* estate management,
- \* training of management teams and customers,
- \* cooperation with foreign centres.

We have invited, as before, the Ministry of Industry and Trade, Ministry of Business

Promotion, Ministry of Labour and Social Policy, Ministry of Privatization, Ministry of European Integration, Committee on Scientific Research, Cooperation Fund, UN Development Program, IRIS Poland and other central institutions involved in business promotion to attend the conference.

The topics will be introduced by the directors of Polish and foreign business & innovation centres, international experts and representatives of governmental agencies.

You are requested to submit the abstract of your paper that you wish to deliver at the conference, before 15 August to enable placing it in the conference documents. English and Polish shall be the official languages of the conference. The attendance cost (including room and board, and the conference documents) totals US\$ 300 payable either by bank transfer (Wielkopolski Bank Kredytowy IV Oddzial (Division) in Poznan, No 356338-20066-132, or upon your arrival, prior to the conference.

Please send your attendance card before 30 August, 1993 to:  
**Polish Business & Innovation Centres Association,**  
**ul. Polanka 3, 61-131 Poznan,**  
**fax 0-61/ 77-18-31**  
**tel. 0-61/ 77-18-63 or**  
**0-61/ 77-17-51 ext. 43**

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**WIELKOPOLSKA BUSINESS & INNOVATION CENTRE Inc.**  
3 Polanka St. Poznań, Phone 77-18-63; 77-17-51 ext. 39, 43; fax: 52-73-27, 77-18-31  
Kalisz Division: 6 Górnoślaska St.; 68-800 Kalisz; Phone 748-02

WIELKOPOLSKA BUSINESS & INNOVATION CENTRE Inc. (WIP) is the first Polish business incubator. The Centre was established in 1990 as a joint-stock company set up by the Heads of the following provinces: Kalisz, Konin, Poznań, Zielona Góra, and Commercial and Industrial Chamber POZNAŃ, Enterprise for Implementation of Technological Progress POSTEOR, and two companies with Poznań Technical University' equity: TERMOGOSCO and POLINGOSCO.

We are a member of the National Business Incubators Association (NBIA) in USA, and the German Association of Business and Innovation Centres Network (ADT) in Germany. We cooperate with the European Association for Innovation and Entrepreneurship Centres (EBN) in Bruxelles and Poznań Technical University, Zielona Góra Technical University, Poznań University of Economics, Polish Economic Society, Scientific Society for Organization and Management, etc.

The Wielkopolska Business & Innovation Centre, Inc. has been established to support business and innovation;

initiate entrepreneurship in Poland and in the region.

In particular WIP concentrates on:

#### BUSINESS

1. Running business of innovative character, i.e. preparation for sale of modern technology, organization, and economic;

2. Domestic and foreign trade and service;

3. Data bank: collection and processing for sale of scientific, technical, and economic data. Recording of business book and Journals. Data bank on land, machinery, and equipment available in the province and particular communes for sale or lease;

4. Assistance in finding buildings and facilities with business function;

5. Organization of exhibitions and promotional campaigns for scientific and technical achievements;

6. Implementation of joint ventures;

7. Book-keeping and taxation consulting.

#### PUBLISHING HOUSE

1. Publications of foreign books on small and medium business, incubators, business economics and finances;

2. Manuals for foreign and Polish businessmen;

3. Publication of leaflets on business and tourist opportunities in a region, commune, city, province;

4. Publication of advertisement brochures, catalogues, etc.

#### LAUNCHING OF BUSINESS INCUBATORS, TECHNOLOGICAL PARKS, TRANSFER OF TECHNOLOGY

1. Conceptual studies, analysis, business-plan of a business incubator and technological park;

2. Supervision and consulting in business incubator and technological park during implementation stage;

3. Documentation for business incubator

and technological park;

4. Assistance in transfer of technology.

#### ORGANIZATION AND CONSULTING IN LOCAL BUSINESS (COMMUNE)

1. Consulting in defining needs and goals of commune business development;

2. Assistance in launching of commune business centre;

3. Business-plan for rural tourist enterprise;

4. Cooperation in preparation of business offers for Polish and foreign partners.

#### ASSISTANCE TO BUSINESSMEN AND BUSINESSES

1. Consulting and assistance in strategy selection;

2. Preparation of business- plans and credit applications;

3. Preparation and implementation of restructuring and ownership transformations;

4. Business liquidation;

5. Management teams leasing selection and appointment;

6. Filling applications for debt reduction, negotiations;

7. Investment consulting;

8. Top executive selection.

#### CONSULTING

1. Marketing research;

2. Advertisement efficiency surveys;

3. Productivity and effectiveness surveys;

4. Property/estate evaluation;

5. UNIDO analyses;

6. Research in technology transfer;

7. International business partners matching (cooperation, export, import, joint ventures);

8. Settlements of ownership titles.

#### TRAINING AND COURSES

1. Training for the unemployed;

2. Courses for candidates to Supervisory Boards;

3. Computer courses;

4. Courses for syndics;

5. Courses: "The Art of Selling", "English in Business Negotiations", "Secretary's Office Organization";

6. Courses: "How to Run an Export & Import Business", "Customs Duty Agency", foreign languages;

7. Data bank on courses, training, studies in business in Poland and abroad.

#### ORGANIZATION OF DOMESTIC AND FOREIGN CONFERENCES

1. Conferences on innovation and entrepreneurship;

2. Conferences on technology transfer;

3. Conferences on fighting unemployment.

We organize meetings and seminars with politicians, scientists, and businessmen, Polish and foreign.

We invited you to cooperation

Florian Buks

President of WIP Inc.



**ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ**

80-855 GDAŃSK  
ul. Waly Piastowskie 24  
POLAND

tel. 384-412, 384-319  
tlx. 513170, 513160  
fax. 384219, 317121

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July 28, 1993

Lr. Ray Ryan  
Executive Director  
Center on Education and Training for Employment  
The Ohio State University  
1900 Kenny Rd.  
Columbus, Ohio 43210

Dear Dr. Ryan:

As we begin our fourth year of cooperation with CETE and its International Enterprise Academy, we would like to express our appreciation for the excellent relationships established between ourselves and your staff. During this period of time, we have been developing many new strategies to help Poland develop a stronger economy and new jobs. This is an effort vital to the interests of the Solidarity union and all of Poland.

We appreciate the way your staff has worked with us in managing a number of complex projects and activities. Their professional approach has enabled us to accomplish so much in such a short time. We recognize that developing instructional materials, training instructors, managing a national conference, organizing adult training institutes, planning visits to the U.S., working with third party evaluators, and training our staff in leadership techniques has been a major challenge for you.

We appreciate the communications and management techniques you have established with us. Your weekly telephone calls with a "to do" list have taught us how to work cooperatively across the miles. Now that we are planning to have E-Mail in Poland it should be even easier.

Our staff enjoyed the recent planning meeting in Columbus and feel we have made an excellent start in our plans for the year. We feel there is a good sense of teamwork established that has resulted from our mutual respect for the expertise on all sides.

Sincerely,

Marcin Flisykowski  
General Director



ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ

80-855 GDAŃSK  
ul. Waly Piastowskie 24  
POLAND

tel. 314-051, 384-412, 384-319  
tlx 513160  
fax 384219, 314478

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AID III  
ACTIVITY REPORT

1.07-30.09.93

1. Coordinating work of Entrepreneurship Institutes
  - phone calls every week to answer questions and check current activities of three centers;
  - solving problems connected with current operation of Entrepreneurship Institutes.
  
2. Managing subcontractors budget - every quarter:
  - verifying preliminary budget;
  - checking financial reports sent by each institute;
  - sending money to each center with a letter stating quarterly allocation of the money.
  
3. Equipment:
  - ensuring the requirements of the Institutes regarding equipment purchase for the III year of the project.
  
4. Coordinating activities of Task Force:
  - supervising organization of the AID III first meeting in Warsaw;
  - expanding, after consultations with three sites coordinators, the list of Task Force members;
  - carrying out the meeting at FORUM Hotel, Warsaw on 29th September 1993;
  - planning for the one day long Task Force meeting outside Warsaw, in mid December 1993.
  
5. Collecting information about courses offered currently at Institutes.

6. Starting work on Case Studies:

- brainstorming with three sites coordinators about the future shape and content of Case Studies;
- supervising work of people responsible at all sites for case production.

7. Coordinating work on satellite sites for the three Institutes:

- gathering information about satellite cities and the process of searching candidates for satellites coordinators;
- learning and approving about each Institute approach to satellite set up.

8. Supervising Coordinators meeting in Warsaw on 28th September 1993:

- booking hotels for all and organizing meeting place at American-Polish Labor Center in Warsaw;
- participating and monitoring an all day meeting.

8. Arranging for a site visit in Poznań Institute:

- participating in all organized meeting and talks.

10. Participation along with Dr Ashmore in Innovation and Entrepreneurship Center in Poland conference at Biażejewko near Poznań, 22-23 September 1993:

- publicity activities for ENTREPRENEURSHIP INSTITUTES IN POLAND project.

11. Managing Dr Cathy Ashmore and Elżbieta Jacowicz (CETE) 2-week stay in Poland:

- assisting Dr Ashmore in her visits and meetings in Gdańsk, Poznań and Warsaw.

*Alija Vukusicheti*

July 17, 1993

Dr. John Turner  
Old Dominion University  
Norfolk, Virginia 23529-0156

Dear John:

I would like to invite you to use your sabbatical working with our project in Poland. As you know, we are in our third year of providing technical assistance in setting up three Enterprise Institutes to enable the university faculty to teach the business owners the concepts of a market economy. The project would enable you to work with our university faculty in three sites as follows:

\*Rzeszow (southeastern Poland): The Institute is directed by Krzysztof Kaszuba and assisted by Adam Goral in cooperation with the Marie Curie-Skladowska University and the Rzeszow Technical University. The coordinators are on the faculty of both schools.

\*Poznan (west Poland): The Institute is directed by Zdzislaw Krajewski and assisted by Walery Lach of the Academy of Economics of Poznan. The coordinators are on the faculty of the Academy.

\*Bialystok (northeastern Poland): The Institute is directed by Andrzej Jurgelewicz and assisted by Boguslaw Plawgo as part of the Bialystok School of Business. The coordinators are on the faculty of the University of Warsaw, Bialystok branch.

Subject to receipt of the third year amendment from U.S.AID we are prepared to purchase your airline ticket to Poland and internal travel, as well as per diem costs up to \$90/day. Maximum reimbursement is limited to \$9,020 with appropriate receipts.

We look forward to the opportunity to work closely with you and feel that your expertise in marketing, selling, and E-Mail delivery systems will be a great asset to us. Please let me know if you have any questions.

Sincerely,

M. Catherine Ashmore  
Director, International Enterprise Academy



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

August 11, 1993

John E. Turner, Ed.D.  
Associate Professor, Marketing Education  
Old Dominion University  
Norfolk, VA 23529

Dear John:

I can now officially offer you the opportunity to spend your sabbatical working with our project to develop Enterprise Institutes in Poland. As part of our third year of this AID funded project, we would like you to serve as a consultant to our three training centers, located in Bialystok, Poznan, and Rzeszow. The most convenient time would be January-March, 1994.

Your duties while in Poland would be to provide expert assistance to our faculty and coordinators in these sites. Specifically we would like you to do the following:

- \* Provide assistance to Institute staff in developing instructional materials for a course in Salesmanship. We ask that you suggest materials that could be adapted for use in Poland and assist our Polish team in developing a suitable course to train small business employees, and the employers in some cases.

- \* Provide assistance to staff in developing instructional materials for a course in Managing Human Resources. Again we ask that you suggest materials that could be adapted for Poland and assist our Polish team in developing a suitable course to train small business owners.

- \* Upgrade the skills of faculty to provide training courses for small business owners. Although they have been doing this for almost two years, we have not had a chance to observe them over a period of time and help them improve their techniques. Your extended stay will allow us to find ways where help is needed. This will require development of pedagogical lessons and coaching of faculty to be more student-centered in their delivery.

- \* Assist Institute staff in obtaining and utilizing Internet connectivity. We are still working to get all three Institutes connected via their university nodes. We are all at a very elementary stage of development here and will appreciate your expertise.

All of these different experiences will give you greater insight into the needs of countries in Central Europe which will transfer to interesting possibilities for teaching in your university classroom. We ask that you be open to the needs of the Institutes when you are there and

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provide them as much consultation as you see fit to improve their programs.

We are prepared to purchase your airline ticket to Poland, provide for internal travel by public transportation, and per diem costs up to \$90 per day. The maximum reimbursement is limited to \$9,020 with appropriate receipts.

We look forward to the opportunity to work closely with you and feel that your expertise in marketing, selling, E-Mail and teacher training will be a great asset to us. Please let me know if you have any questions. Since I will be in Europe from August 23 to October 4 please direct any questions to Elzbieta Jacowicz at my office. She will be meeting with me and the coordinators in September to finish planning our activities for the year in Poland. At that time we will identify schedules and assistance for you as you travel around Poland. I know that you will find, as I have, that the Polish people are very hospitable and the work is very much appreciated.

Sincerely,



M. Catherine Ashmore  
Director, International Enterprise Academy

JOHN E. TURNER, Ed.D.  
1013 Wynngate Drive  
Chesapeake, Virginia 23320  
(W) (804) 683-3307; (H) (804) 436-0680; Fax (804) 548-9605

### SKILLS SUMMARY

- 1- Instruction in Retail Marketing and Entrepreneurship
- 2- Preparation of Training and Development Personnel
- 3- Computer Applications and Training (PC)
- 4- Management of Instructional Programs and Personnel
- 5- Instructional Systems and Materials Development
- 6- Grant/Project Management

### HIGHLIGHTS REGARDING SKILLS

#### Instruction in Retailing and Entrepreneurship:

- a) Sixty (60) plus classes of senior level undergraduate instruction in "Retail Marketing" with an entrepreneurial focus.
- b) Off-site small business workshops and seminars in "Starting and Operating Your Own Business".

#### Preparation of Training Personnel:

- a) Approximately thirty (30) classes of senior and graduate level instruction in "Training Techniques for Business and Industry".
- b) On-site Train-the-Trainer workshops and seminars in business and government.

#### Computer Applications and Training:

- a) Provided workshop in utilization of E-Mail. Incorporated off-site dial in to BB, real-time, hands-on application, and large screen projection via LCD projection pad.
- b) One-on-one training for colleagues and staff in utilization of software including communications and word processing.
- c) Personal use of software applications include: Communications (Procomm, Telix, Compuserve Desktop); Word Processing (Word Perfect 5.1, Volkswriter-ASCII, Lotus Ami Pro); Spreadsheet (Lotus ); Page Layout (Pagemaker); Graphics (Harvard); plus Scanning and Graphics editing software.

Management of Instructional Programs:

- a) Program Leader for Marketing Education (25% time, 6 yrs.) Supervised four faculty and one staff position. Included budget planning and monitoring, staff development and curriculum management.
- b) Chairman of Department of Vocational and Technical Studies (50% time, 5 yrs.). Supervised eight full-time and four part-time faculty with two staff personnel. Responsible for budget, supervision and evaluation of personnel and instruction, including salary increments. Programs included Industrial Education/Training, Marketing Education/Training, Occupational Education, and Special Needs Vocational Education.

Instructional Systems and Materials Development:

- a) Completed initial research (task validation), application, and implementation of university program to train trainers for business and industry.
- b) Developed (conducted task analysis), authored, and supervised research staff in development of instructional materials in: Entrepreneurship, International Marketing, Real Estate Marketing, Consumer Information, and Planning and Management of Marketing Programs.

Grant/Project Management:

- a) Served as University Coordinator of Vocational Programs (25% time, 5 yrs.). Coordinated grants totaling over \$1.25 million. Responsibilities included: Planning, Application, Evaluation, Budgeting, Equipment Purchase, and Supervision of research associates.
- b) Funded for total of seven (7) state and one (1) federal grant. Estimated total funding \$125 K. Responsibilities included: application, monitoring, budgeting, equipment purchase, and product delivery.

OTHER RELEVANT ACTIVITIES:

- a) Consultations for Small Businesses, Government, a Public Utility, a Financial Institution, and State and Local Departments of Education.
- b) Work with Business and Education Partnerships and advisory councils.
- c) Small business consulting utilizing interactive laser disk.
- d) Data searches using electronic search and retrieval including literature review of Joint Ventures.



**APPENDIX**

# 2.0

**ESTABLISH  
SATELLITE  
OFFICES**

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**BIAŁYSTOK BUSINESS SCHOOL  
ENTREPRENEURSHIP INSTITUTE**  
Białystok, Wiejska 45E, phone# 219-45

The Director  
**FOUNDATION FOR LOCAL DEVELOPMENT**  
Bielsk Podlaski  
Kopernika Street

Białystok Business School and Entrepreneurship Institute operated within Białystok Foundation for Staff Training declare assistance and cooperation for Bielsk Podlaski Foundation for Local Development.

Białystok Business School Affiliate starts its operations on the 1st of October, 1993. Our affiliate's aim is to deliver variety of trainings to the local community what might be a part of programs and initiatives addressed by Local Labor Office, local organizations and entrepreneurs' environment.

We strongly believe that activities of our Białystok Business School Affiliate with local initiatives will lead to the development of entrepreneurship in Bielsk Podlaski and its region.

Entrepreneurship Institute

Andrzej Jurgilewicz  
Director

# BIAŁOSTOCKA SZKOŁA BIZNESU INSTYTUT PRZEDSIĘBIORCZOŚCI

Białystok, ul. Wiejska 45 E, tel. 219-45

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Dyrektor Fundacji  
na Rzeczą Rozwoju Lokalnego  
Bielsk Podlaski  
ul. Kopernika

Białostocka Szkoła Biznesu i Instytut Przedsiębiorczości działający w ramach Białostockiej Fundacji Kształcenia Kadr w Białymstoku deklaruje pomoc i współpracę dla powstającej w Bielsku Podlaskim Fundacji na Rzeczą Rozwoju Lokalnego. Będzie to możliwe i niezbędne w związku ze staraniami w/w Fundacji o utworzenie Funduszu Rozwoju Przedsiębiorczości.

Białostocka Szkoła Biznesu z dniem 01.10.1993 rok rozpoczyna działalność w swoim oddziale w Bielsku Podlaskim. W związku z powyższym będzie prowadziła głównie działalność szkoleniową na terenie Bielska Podlaskiego, co współgra z zamierzeniami i inicjatywami lokalnych organizacji i instytucji takich jak wzmiankowana Fundacja, Fundusz a także Rejonowy Urząd Pracy i miejscowe środowisko przedsiębiorców.

Sądzimy, że działalność bielskiego oddziału Białostockiej Szkoły Biznesu wraz z inicjatywami lokalnymi, w tym Fundacji, dobrze będą służyć rozwojowi przedsiębiorczości na terenie miasta i gminy Bielsk Podlaski.

Instytut Przedsiębiorczości  
  
Andrzej Jurgilewicz  
DYREKTOR

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**BIALYSTOK BUSINESS SCHOOL  
ENTREPRENEURSHIP INSTITUTE  
Białystok, Wiejska 45E, phone# 219-45**

**The Board of Directors  
COOPERATIVE BANK  
Bielsk Podlaski  
3 Maja 14**

With reference to our previous discussion with Dr Jerzy Paszkowski, the Manager of the Białystok Business School Affiliate in Bielsk Podlaski and the Director of Cooperative Bank in Bielsk Podlaski we would like you to have us a permission for using a room located in the Cooperative Bank building, for the period of the first year of our operations, i.e. 10.01.1993 - 0.7.30, 1994.

The Białystok Business School Affiliate in Bielsk Podlaski starts its activities on the 1 October, 1993. Our affiliate operates within Białystok Foundation for Staff Education which is a non-profit organization. We will deliver variety of trainings and try to establish cooperation with local institutions and organizations in order to promote entrepreneurship and basics of running a small business.

The profile of our new affiliate activities has already been proved by the local government, Local Labor Office, Foundation for Local Initiatives and Entrepreneurship Development Fund. Our affiliate will offer trainings to the mentioned institutions as well as private companies and institutions connected with small business infrastructure. The price of our trainings will be calculated at costs. Employees of Cooperative Bank will have access to the trainings with some preferences (of course if you find them interesting).

We understand that we are not charged for using your accommodation at least during the first half year of our activities.

We would like to assure you that our activities will not interrupt you and your employees in your daily operations. We believe that our trainings will have a tremendous impact on entrepreneurship development, empowerment of local initiatives and promotion of local entrepreneurs what we perceive as our priority.

Sincerely,

Andrzej Jurgilewicz

# BIAŁOSTOCKA SZKOŁA BIZNESU INSTYTUT PRZEDSIĘBIORCZOŚCI

Białystok, ul. Wiejska 45 E, tel 219-45

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DYREKCJA I ZARZĄD  
BANKU SPÓŁDZIELCZEGO  
w Bielsku Podlaskim  
ul. 3 Maja 14

W nawiązaniu do wstępnych rozmów dr Jerzego Paszkowskiego Kierownika Oddziału Białostockiej Szkoły Biznesu w Bielsku Podlaskim i Dyrektora Banku Spółdzielczego w Bielsku Podlaskim wnosimy o udostępnienie Oddziałowi Białostockiej Szkoły Biznesu pokoju w budynku Banku Spółdzielczego na pierwszy rok jego funkcjonowania, tj. na okres od 01.10.1993 do 30.07.1994 roku.

Termin rozpoczęcia działalności Oddziału Białostockiej Szkoły Biznesu w Bielsku Podlaskim planuje się na 01.10.1993 rok. Szkoła, jak i Instytut Przedsiębiorczości, funkcjonuje w ramach Białostockiej Fundacji Kształcenia Kadr - instytucji nie działającej dla osiągnięcia zysku. Bielski Oddział Szkoły będzie zajmował się organizowaniem szkoleń oraz współpracą z instytucjami i organizacjami lokalnymi działającymi w celu promocji przedsiębiorczości i zasad biznesu.

Profil działalności i uzgadniana już współpraca są znane i akceptowane przez władze miasta i gminy, a także Rejonowy Urząd Pracy oraz powstającą Fundację na Rzecz Rozwoju Lokalnego, potencjalnie również Fundusz Rozwoju Przedsiębiorczości, o który aplikacja została złożona. Na rzecz głównie tych instytucji oraz przedsiębiorstw prywatnych i instytucji związanych z infrastrukturą biznesu Bielski Oddział BSB ma zamiar działać. Szkolenia będą kalkulowane według kosztów własnych z preferencyjną do nich dostępnością dla przedstawicieli Banku Spółdzielczego (o ile będziecie Państwo zainteresowani ich tematyką).

Z uwagi na powyższe prosimy o nieobciążanie nas odpłatnością za korzystanie z pokoju w Państwa siedzibie, przynajmniej w początkowym okresie funkcjonowania (pierwsze pół roku działalności).

Jesteśmy przekonani, że działalność nasza nie będzie zakłócała toku pracy Banku, może natomiast przyczynić się do rozwoju przedsiębiorczości i inicjatyw lokalnych, jak również do wsparcia lokalnego środowiska przedsiębiorców, co stawiamy sobie za jeden z zasadniczych celów działalności.

Z uszanowaniem

Instytut Przedsiębiorczości  
*Andrzej Jurgilewicz*  
Andrzej Jurgilewicz  
DYREKTOR

**BIALYSTOK BUSINESS SCHOOL  
ENTREPRENEURSHIP INSTITUTE  
Białystok, Wiejska 45E, phone# 219-45**

**Director  
Poland's Telecommunication Ltd.,  
Telecommunication Division  
Bielsk Podlaski Region  
Kopernika 5**

**By reason of opening a new affiliate of Białystok Business School and Entrepreneurship Institute in Bielsk Podlaski on the 1st of October 1993, we would like you to have us a new telephone number.**

**Our affiliate is located in the Cooperative Bank, at 3 Maja Street 14. Its major aim is to organize trainings and develop network with different institutions involved in economic development of Bielsk Podlaski and its region. As you can see a telephone is a indispensable tool for doing our job.**

**All expenses will be covered by Białystok Foundation for Staff Training of which Białystok Business School and Entrepreneurship Institute is part of. BFST will settle all accounts related to the affiliate activities.**

**If you need more information please contact dr Jerzy Paszkowski who is the Manager of Białystok Business School Affiliate.**

**Entrepreneurship Institute**

**Andrzej Jurgilewicz  
Director**

# BIAŁOSTOCKA SZKOŁA BIZNESU INSTYTUT PRZEDSIĘBIORCZOŚCI

Białystok, ul. Wiejska 45 E, tel 219-45

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Dyrektor  
Telekomunikacji Polskiej S.A.  
Zakładu Telekomunikacji  
Rejon Bielsk Podlaski  
ul. Kopernika 5

W związku z zamierzonym rozpoczęciem funkcjonowania Oddziału Białostockiej Szkoły Biznesu i Instytutu Przedsiębiorczości w Bielsku Podlaskim z dniem 01.10.1993 rok uprzejmie prosimy o przyznanie numeru telefonicznego w/w instytucji.

Oddział ma swoją siedzibę w Banku Spółdzielczym przy ul. 3 Maja 14. Numer telefoniczny jest niezbędny do normalnego funkcjonowania Oddziału BSB. Białostocka Szkoła Biznesu będzie zajmowała się szkoleniami oraz współpracą z instytucjami lokalnymi działającymi na rzecz rozwoju przedsiębiorczości na terenie miasta i gminy Bielsk Podlaski.

Koszty związane z przyznaniem numeru telefonicznego pokryje Białostocka Fundacja Kształcenia Kadr, w ramach której funkcjonuje Białostocka Szkoła Biznesu i Instytut Przedsiębiorczości w Białymstoku. BFKK będzie rozliczała wszelkie koszty funkcjonowania Oddziału BSB.

Do szczegółowych rozmów w tej i innych kwestiach związanych z funkcjonowaniem Oddziału BSB w Bielsku Podlaskim upoważniony jest dr Jerzy Paszkowski jako kierownik Oddziału.

Instytut Przedsiębiorczości  
*Andrzej Jurgilewicz*  
DYREKTOR

**BIAŁYSTOK BUSINESS SCHOOL  
ENTREPRENEURSHIP INSTITUTE  
Białystok, Wiejska 45E, phone# 219-45**

**The Mayor of City  
Bielsk Podlaski**

**Białystok Business School and Entrepreneurship Institute operated within Białystok Foundation for Staff Training in Białystok declare their assistance and cooperation for a new Bielsk Podlaski Foundation for Local Development. Our cooperation might be possible because our Foundation has already started to create Entrepreneurship Development Fund.**

**Białystok Business School starts its activities in its affiliate located in Bielsk Podlaski, on the 1st of October, 1993. We will provide Bielsk Podlaski with variety of trainings which we believe will become an valuable part of programs and initiatives addressed by local organizations, Regional Labor Office, Foundation mentioned above and local community of entrepreneurs.**

**I believe that activities of our Białystok Business School Affiliate with local institutions will bring an important impact in the process of economic development of Bielsk Podlaski region.**

**Entrepreneurship Institute**

**Andrzej Jurgilewicz  
Director**

# BIAŁOSTOCKA SZKOŁA BIZNESU INSTYTUT PRZEDSIĘBIORCZOŚCI

Białystok, ul. Wiejska 45 E, tel. 219-45

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Burmistrz Miasta  
Bielsk Podlaski

Białostocka Szkoła Biznesu i Instytut Przedsiębiorczości działający w ramach Białostockiej Fundacji Kształcenia Kadr w Białymstoku deklarują pomoc i współpracę dla powstającej w Bielsku Podlaskim Fundacji na Rzecz Rozwoju Lokalnego. Będzie to możliwe i niezbędne w związku ze staraniami w/w Fundacji o utworzenie Funduszu Rozwoju Przedsiębiorczości.

Białostocka Szkoła Biznesu z dniem 01.10.1993 rok rozpoczyna działalność w swoim oddziale w Bielsku Podlaskim. W związku z powyższym będzie prowadziła głównie działalność szkoleniową na terenie Bielska Podlaskiego, co współgra z zamierzeniami i inicjatywami lokalnych organizacji i instytucji takich jak wzmiankowana Fundacja, Fundusz a także Rejonowy Urząd Pracy i miejscowe środowisko przedsiębiorców.

Sądzymy, że działalność bielskiego oddziału Białostockiej Szkoły Biznesu wraz z inicjatywami lokalnymi, w tym Fundacji, dobrze będą służyć rozwojowi przedsiębiorczości na terenie miasta i gminy Bielsk Podlaski.

Instytut Przedsiębiorczości  
  
Andrzej Jurgilewicz  
DYREKTOR

**BIAŁYSTOK BUSINESS SCHOOL  
ENTREPRENEURSHIP INSTITUTE  
Białystok, Wiejska 45E, phone# 219-45**

**The Chief Officer of a group  
of village, Bielsk Podlaski  
Mr Jerzy Ignatiuk**

**Białystok Business School and Entrepreneurship Institute operated within Białystok Foundation for Staff Training in Białystok declare assistance and cooperation for a new Bielsk Podlaski Foundation for Local Development. Our cooperation might be possible because our Foundation has already started to create Entrepreneurship Development Fund.**

**Białystok Business School starts its activities in its new affiliate located in Bielsk Podlaski on the 1st of October, 1993. We will provide Bielsk Podlaski with variety of trainings which we believe will become a valuable part of programs and initiatives addressed by local organizations, Regional Labor Office and local community of entrepreneurs.**

**I believe that activities of Białystok Business School Affiliate with local institutions will bring an important asset to the process of economic development of Bielsk Podlaski region.**

**Entrepreneurship Institute**

**Andrzej Jurgilewicz  
Director**

# BIAŁOSTOCKA SZKOŁA BIZNESU INSTYTUT PRZEDSIĘBIORCZOŚCI

Białystok, ul. Wiejska 45 E, tel. 219-45

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Wójt Gminy  
Bielsk Podlaski  
mgr Jerzy Ignatiuk

Białostocka Szkoła Biznesu i Instytut Przedsiębiorczości działający w ramach Białostockiej Fundacji Kształcenia Kadr w Białymstoku deklaruje pomoc i współpracę dla powstającej w Bielsku Podlaskim Fundacji na Rzecz Rozwoju Lokalnego. Będzie to możliwe i niezbędne w związku ze staraniami w/w Fundacji o utworzenie Funduszu Rozwoju Przedsiębiorczości.

Białostocka Szkoła Biznesu z dniem 01.10.1993 rok rozpoczyna działalność w swoim oddziale w Bielsku Podlaskim. W związku z powyższym będzie prowadziła głównie działalność szkoleniową na terenie Bielska Podlaskiego, co współgra z zamierzeniami i inicjatywami lokalnych organizacji i instytucji takich jak wzmiankowana Fundacja, Fundusz a także Rejonowy Urząd Pracy i miejscowe środowisko przedsiębiorców.

Sądzymy, że działalność bielskiego oddziału Białostockiej Szkoły Biznesu wraz z inicjatywami lokalnymi, w tym Fundacji, dobrze będą służyć rozwojowi przedsiębiorczości na terenie miasta i gminy Bielsk Podlaski.

Instytut Przedsiębiorczości  
*Andrzej Jurgilewicz*  
Andrzej Jurgilewicz  
DYREKTOR

**AGREEMENT ON COOPERATION**  
between  
**The Bialystok Foundation for Staff Training**  
and  
**The Chamber of Tourism and Agriculture in Suwalki**  
August 31, 1993

The Bialystok Foundation for Staff Training  
represented by The Vice Director Andrzej Jurgilewicz  
and  
The Chamber of Tourism and Agriculture in Suwalki  
represented by The Director Zygmunt Osiecki

agree as follows:

**1**

Both parties declare to undertake activities to assist entrepreneurs, persons running small businesses and those who are interested in enhancing their knowledge in the scope of small and medium entrepreneurship in Suwalki voivodship through:

- establishing information center BFST within the Chamber of Tourism and Agriculture in Suwalki
- organizing trainings (The Bialystok Foundation for Staff Training runs trainings based on curriculum proved by the United States Agency for International Development and European Economic Community)
- conducting research focused on local entrepreneurship development
- organizing meetings with entrepreneurs
- preparing training curriculum and educational materials
- promoting undertakings and sharing experiences

**2**

The Bialystok Foundation for Staff Training is taking the responsibility for providing the information center with the faculty, technical assistance, curriculum and training materials and The Chamber of Tourism and Agriculture agrees to prepare facilities necessary for running trainings and daily activities at the Chamber office in Suwalki, at Kościuszki 71 street.

**3**

Assigned person responsible for developing cooperation between the Foundation for Staff Training and the Chamber of Tourism and Agriculture is obliged to act according to the status of the Foundation and The Chamber.

The Bialystok Foundation  
for Staff Training  
Andrzej Jurgilewicz

Chamber for Tourism and Agriculture  
Zygmunt Osiecki

# **POROZUMIENIE**

w sprawie współpracy  
Białostockiej Fundacji Kształcenia Kadr  
i  
Izby Turystyczno-Rolniczej w Suwałkach  
zawarte w dniu 31 sierpnia 1993 r.

**Białostocka Fundacja Kształcenia Kadr**  
reprezentowana przez Zastępcę Prezesa Andrzeja Jurgilewicza  
i  
**Izba Turystyczno-Rolnicza w Suwałkach**  
reprezentowana przez Prezesa Zygmunta Osieckiego  
postanawiają co następuje:

## **PKT 1**

Strony deklarują gotowość realizacji wspólnych przedsięwzięć, mających na celu udzielanie pomocy przedsiębiorcom, osobom prowadzącym działalność gospodarczą oraz zainteresowanym pogłębieniem wiedzy w zakresie małej i średniej przedsiębiorczości na terenie województwa suwalskiego poprzez:

- uruchomienie punktu informacyjnego BFKK przy Izbie Turystyczno-Rolniczej w Suwałkach
  - organizację szkoleń ( Białostocka Fundacja Kształcenia Kadr prowadzi szkolenia według programu uzgodnionego z Agencją Rozwoju Międzynarodowego Stanów Zjednoczonych oraz Komisją Wspólnot Europejskich )
  - działalność badawczą dotyczącą rozwoju lokalnej przedsiębiorczości
  - wspólną organizację spotkań przedstawicieli przedsiębiorców
  - wymianę doświadczeń i materiałów
  - wspólne przygotowywanie programów szkoleń i opracowywanie materiałów dydaktycznych
  - promocję wspólnych przedsięwzięć

## **PKT 2**

Białostocka Fundacja Kształcenia Kadr zobowiązuje się do zapewnienia fachowej obsługi w punkcie konsultacyjnym w Suwałkach, do udostępnienia materiałów szkoleniowych i programów szkoleń, do pomocy w wyposażeniu punktu informacyjnego, natomiast Izba Turystyczno-Rolnicza do zagwarantowania bazy lokalowej na potrzeby działalności bieżącej i szkoleniowej w siedzibie Izby w Suwałkach przy ul. Kościuszki 71.

**PKT 3**

Osoba koordynująca w Suwałkach współpracę Białostockiej Fundacji Kształcenia Kadr z Izbą Turystyczno-Rolniczą obowiązana jest działać zgodnie ze statutem Fundacji i Izby Turystyczno-Rolniczej.

Za Białostocką Fundację  
Kształcenia Kadr  
Andrzej Jurgilewicz

Za Izbę Turystyczno-Rolniczą  
Zygmunt Osiecki



V-ce Prezes Zarządu



Andrzej Jurgilewicz

**AGREEMENT on COOPERATION**  
between  
**The Bialystok Foundation for Staff Training**  
and  
**The House of Local Initiatives in Suwalki**  
September 20, 1993

**The Bialystok Foundation for Staff Training**  
represented by **The Vice Director Andrzej Jurgilewicz**  
and  
**The House of Local Initiatives in Suwalki**  
represented by **The Director Zygmunt Osiecki**

agree as follows:

**1**

Both parties declare to undertake activities to assist entrepreneurs, persons running small businesses and those who are interested in enhancing their knowledge in the scope of small and medium entrepreneurship in Łomża voivodship through:

- establishing information center BFST within the House of Local Initiatives in Łomża
- organizing trainings (The Bialystok Foundation for Staff Training runs trainings based on curriculum proved by the United States Agency for International Development and European Economic Community)
- conducting research focused on local entrepreneurship development
- organizing meetings with entrepreneurs
- preparing training curriculum and educational materials
- developing promotion of joint activities, sharing experiences

**2**

The Bialystok Foundation for Staff Training is taking the responsibility for providing the information center with the faculty, technical assistance, training materials and curriculum and the House of Local Initiatives agrees to prepare facilities necessary for running trainings and daily activities at the House office in Łomża, at Nowogrodzka 71 street.

**3**

Assigned person responsible for developing cooperation between the Foundation for Staff Training and the House of Local Initiatives is obliged to act according to the status of the Foundation and The House.

**The Bialystok Foundation**  
**for Staff Training**  
**Andrzej Jurgilewicz**

**The House of Local Initiatives**  
**Franciszek Adamiak**

# POROZUMIENIE

## W SPRAWIE WSPÓLPRACY BIAŁOSTOCKIEJ FUNDACJI KSZTAŁCENIA KADR I DOMU INICJATYW LOKALNYCH W ŁOMŻY

ZAWARTE W DNIU 20 WRZEŚNIA 1993 r.

**Białostocka Fundacja Kształcenia Kadr**  
reprezentowana przez Zastępcę Prezesa Andrzeja Jurgilewicza  
i

**Dom Inicjatyw Lokalnych w Łomży**  
reprezentowany przez Dyrektora Franciszka Adamiaka

postanawiają co następuje:

### PKT 1

Strony deklaruja gotowość realizacji wspólnych przedsięwzięć, mających na celu udzielanie pomocy przedsiębiorcom, osobom prowadzącym działalność gospodarczą oraz zainteresowanym pogłębieniem wiedzy w zakresie małej i średniej przedsiębiorczości na terenie województwa łomżyńskiego poprzez:

- uruchomienie punktu informacyjnego BFKK przy Domu Inicjatyw Lokalnych w Łomży
- organizację szkoleń (Białostocka Fundacja Kształcenia Kadr prowadzi szkolenia według programu uzgodnionego z Agencją Rozwoju Międzynarodowego Stanów Zjednoczonych oraz Komisją Wspólnot Europejskich)
- działalność badawczą dotyczącą rozwoju lokalnej przedsiębiorczości
- wspólną organizację spotkań przedstawicieli przedsiębiorców
- wymianę doświadczeń i materiałów
- wspólne przygotowywanie programów szkoleń i opracowywanie materiałów dydaktycznych
- promocję wspólnych przedsięwzięć

### PKT 2

Białostocka Fundacja Kształcenia Kadr zobowiązuje się do zapewnienia fachowej obsługi w punkcie konsultacyjnym w Łomży, do udostępnienia materiałów szkoleniowych i programów szkoleń, do pomocy w wyposażeniu punktu informacyjnego, natomiast Dom Inicjatyw Lokalnych do zagwarantowania bazy lokalowej na potrzeby działalności bieżącej i szkoleniowej w siedzibie przy ul. Nowogródzkiej 1 w Łomży.

### PKT 3

Osoba koordynująca współpracę Białostockiej Fundacji Kształcenia Kadr z Domem Inicjatyw Lokalnych w Łomży obowiązana jest działać zgodnie ze statutem Fundacji i Domu Inicjatyw Lokalnych.

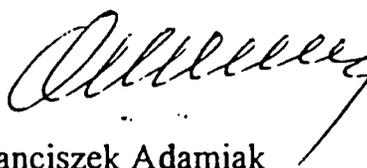
Za Białostocką Fundację  
Kształcenia Kadr

V-ce Prezes Zarządu

  
Andrzej Jurgilewicz

Andrzej Jurgilewicz

Za Dom Inicjatyw Lokalnych



Franciszek Adamiak



**APPENDIX**

**3.0**

**NEW  
SEMINARS**



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

July 23, 1993

Mr Wayne Talarzyk, Professor  
The Ohio State University  
1775 Collage Road  
249 Hagerty Hall  
Columbus, Ohio

Dear Professor,

We would like to thank you for your involvement in our small business institutes project in Poland.

We found your presentation very interesting and valuable and we shall be very happy to have you work with us on this project.

In the third year of our project we expect our Polish faculty to develop materials and training seminars on *Retail Management - "Successful Retailing"* by themselves. However, we think it is still important to provide assistance to them.

We see your role as the consultant to:

- 1/ identify key topics of *"Successful Retailing"* seminar and resources for Polish faculty (completion date by the end of August)
- 2/ review course teaching outline which will be developed by our faculty in Poland and suggest additional materials if still needed (October)
- 3/ review the content of seminar materials with Elżbieta Jacowicz (November-December) and make changes if necessary
- 4/ conduct training seminars for faculty in 3 sites (Rzeszów, Białystok, Poznań; 2 weeks in February or March) - present teaching methods.

The seminar is planned to be 30-hour event and it is expected by our faculty that the training will enable the participant to:

- design retail operations
- develop competitive strategies
- manage inventory including computerized systems
- promote the business
- control cash flow
- improve retail operations.

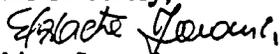
We would like to underline that this course is designed for existing small shop owners who wish to improve the efficiency of their businesses.

We would like to offer you \$ 5,000 as a total remuneration for your assistance. This will include one trip to Poland for two weeks (airline ticket paid and living expenses - hotel, meals of 90\$ per day).

We hope you will find time to work on our project in Poland and we would appreciate your response.

We look forward to working with you.

Yours sincerely,



Elżbieta Jacowicz

Program Associate

Entrepreneurship

**W. WAYNE TALARZYK  
Professor of Marketing  
The Ohio State University**

2402 Southway Drive  
Columbus, Ohio 43221  
(614) 488-0563

1775 College Road  
Columbus, Ohio 43210  
(614) 292-4710

Dr. Wayne Talarzyk is Professor of Marketing and Chair of Undergraduate Programs in the College of Business at The Ohio State University. His teaching and research interests lie primarily in the areas of managerial marketing, promotional strategies, consumer attitudes and lifestyles, and electronic technologies in marketing.

Born in Evansville, Indiana, Dr. Talarzyk received his bachelor's degree in electrical engineering from Purdue University in 1962. From 1962-1965, he was a flight test engineer with the Atlas missile systems at General Dynamics/Astronautics in California.

Dr. Talarzyk returned to Purdue University in 1965 and received his master's degree in Industrial Administration in 1966 and was awarded the Ph.D. degree in 1969. While at Purdue, he served as an instructor in marketing management and financial management. Dr. Talarzyk joined the Marketing faculty at Ohio State in 1969 and served as Chairman of the faculty from 1980-1988.

His research projects, many of which have been concerned with the applications of consumer attitudes and lifestyles research, and new technologies in marketing, with specific emphasis on videotex, are regularly reported through authored or co-authored articles appearing in professional journals and conference proceedings. Dr. Talarzyk's research has been published in the Journal of Marketing, Journal of Marketing Research, Journal of Business Research, Journal of Consumer Affairs, and other journals. He has lectured in England, Scotland, Japan, China, Singapore, South Africa, and Hong Kong.

He is active in the business community serving as a professional consultant and is also a frequent participant in executive seminars, continuing education programs and professional association conferences. He is also involved with the religious community as a lay pastor and serves as faculty advisor to Campus Crusade for Christ at Ohio State.

Dr. Talarzyk is author or co-author of fifteen college textbooks, three research monographs, and three professional manuals. His latest books include Cases and Exercises in Marketing and Contemporary Cases in Consumer Behavior, third edition. He has received outstanding teaching and service awards from Purdue University and The Ohio State University.

# Retail Management - Successful Retailing

## Module 1 - Overview of Retailing Issues

A model of retailing  
Retailing myopia  
Margin vs. turn operations  
Selling vs. marketing  
Customer vs. product orientation  
*Note: I would like to take the lead in  
developing this module*

## Module 2 - Retailing Financial Management

Balance sheet - income statement  
Financial ratios  
Breakeven analysis  
# 2 pp. 159-165  
# 3 pp. 77-88  
# 4 pp. 265-268

## Module 3 - Product: Implications for Retailing

Merchandising  
Product life cycle  
Inventory control  
# 1 pp. 98-106  
# 3 pp. 96-107  
# 3 pp. 149-156  
# 4 pp. 135-146

## Module 4 - Price: Implications for Retailing

Pricing  
Markdowns  
# 2 pp. 73-74  
# 4 pp. 157-172  
# 4 pp. 325-330

## Module 5 - Place: Implications for Retailing

Store layout  
Ambiance  
Displays  
# 2 pp. 55-62  
# 3 pp. 53-61  
# 3 pp. 64-68  
# 4 pp. 122-132  
# 4 pp. 218-221

74

## **Module 6 - Promotion: Implications for Retailing**

**Advertising**

**Personal selling**

**Sales promotions**

**Public relations**

**# 1 pp.72-87**

**# 2 pp. 91-110**

**# 3 pp. 140-145**

**# 4 pp. 222-226**

**# 4 pp. 228-238**

**# 4 pp. 239-252**

## **Module 7 - Serving the Customer**

**Marketing research**

**Customer service**

**Motivating employees**

**# 2 pp. 83-89**

**# 4 pp. 174-183**

**# 4 pp. 209-212**

**# 4 pp. 315-319**

*Note: Each module would be about 3-4 hours in length of presentation*

## REFERENCES

1. Cantor, "Open and Operate Your Own Small Store"

pp. 72-87  
pp. 98-106

2. Taetzsch, "Opening Your Own Retail Store"

pp. 55-62  
pp. 73-74  
pp. 83-89  
pp. 91-110  
pp. 159-165

3. Packard and Carron, "Start Your Own Store"

pp. 53-61  
pp. 64-68  
pp. 77-88  
pp. 96-107  
pp. 140-145  
pp. 149-156

4. Burstiner, "Run Your Own Store"

pp. 122-132  
pp. 135-146  
pp. 157-172  
pp. 174-183  
pp. 209-212  
pp. 218-221  
pp. 222-226  
pp. 228-238  
pp. 239-252  
pp. 265-268  
pp. 315-319  
pp. 325-330

*Note: The following are general references and can be used to help support the information in all of the modules.*

5. Levy and Weitz, "Retailing Management" (This is the text I use to teach our retailing course at OSU)

6. Dunne, Lusch, Gable, and Behardt, "Retailing" (This is a more basic text)

7. Berman and Evans, "Retail Management" Also included - "Readings, Exercises and Problems" and "Instructor's Resource Manual" (This text would be comparable to Levy and Weitz)



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

July 23, 1993

Ms Janina Latack, Professor  
The Ohio State University  
317D Hagerty Hall,  
1775 College Road  
Columbus, Ohio

Dear Professor,

We would like to thank you for your involvement in our Small Business Institutes project in Poland.

We found your presentation very interesting and valuable and we shall be very happy to have you work with us on this project.

In the third year of our project we expect our Polish faculty to develop materials and training seminars on *Team Building* by themselves. However, we think it is still important to provide assistance to them.

We see your role as the consultant to:

- 1/ identify key topics of the *Team building* seminar and resources for Polish faculty (completion date by the end of August),
- 2/ review course teaching outline which will be developed by our faculty in Poland and suggest additional materials if still needed (October),
- 3/ review the content of seminar materials with Elżbieta Jacowicz (November-December) and make changes if necessary,
- 4/ conduct training seminars for faculty in 3 sites (Rzeszów, Białystok, Poznań; 2 weeks in April) - present teaching methods.

-11-

The seminar is planned to be 15-hour event and it is expected by our faculty that the training will enable the participant to:

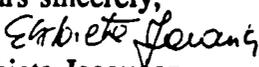
- improve leadership
- increase output
- build positive work environment
- develop skills needed in working in small groups

After the seminar Polish faculty is to run seminars on *Team Building* addressed to different customers - representatives of small businesses, banks, local government, sports, unions etc.

We would like to offer you \$ 5,000 as a total remuneration for your assistance. This will include one trip to Poland for two weeks (airline ticket paid and living expenses - hotel, meals of 90\$ per day).

We hope you will find time to work on our project in Poland and we would appreciate your response.

We look forward to working with you.

Yours sincerely,  
  
Elżbieta Jacowicz  
Program Associate  
Entrepreneurship

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### Janina C. Latack

**Janina C. Latack, PhD is a consultant and author on career management and human resource development. Previously, she was a faculty member in the College of Business at Ohio State University for 13 years. She is highly experienced in providing career assessment and feedback to individuals and in implementing management and executive development programs.**

**In her career management consulting practice, she works with professionals, managers and executives one-on-one to assess strengths and create development plans for maximum career effectiveness. Dr. Latack also works directly with key decision-makers in organizations to build management strength in creating change and developing capabilities in all levels of employees. She conducts management and executive development seminars on leadership assessment and development, coaching, career management, managing during organizational transitions, stress management and communication.**

**She has authored numerous articles which have been published in academic and management journals on a variety of topics including career transitions, employee development strategies, and coping with job stress and job loss. She was invited to be a contributing author for Volume 8 of Research In Personnel and Human Resources Management. Her chapter, entitled "Organizational restructuring and career management: From outplacement and survival to inplacement" outlines cutting-edge strategies used by corporations to maximize effective internal reassignment of employees during restructuring.**

**Dr. Latack is an adjunct faculty member University of Arizona College of Business in the Department of Management and Policy. She is certified as a Career Counselor by the National Board for Certified Counselors (NBCC). Her professional memberships include the National Career Development Association, Arizona Career Development Association, Academy of Management, American Psychological Association, American Society for Training and Development, and the Society for Human Resource Management. She earned her doctorate in Business from Michigan State University and was selected for Beta Gamma Sigma and Phi Kappa Phi honorary societies.**

**Center on Education and Training for Employment**

**Small Business Institutes Project**

**Team Building Seminar**

**Key Topic List and Resources**

**Prepared by Dr. Janina C. Latack  
Consultant in Career Management  
and Human Resource Development  
Adjunct Professor of Management and Policy  
University of Arizona  
College of Business**

**Team Building Seminar**  
**Key Topics List with Resources**  
**for Small Business Institutes Project in Poland**

A well-developed team, which may be the most flexible and competent tool known to organizations today, can benefit its organization with the following abilities and assets:

- Management of Complexity
- Rapid Response
- High Motivation
- High-Quality Decisions
- Collective Commitment
- Collective Strength

Francis & Young, Improving Work Groups.

**Key Topics:**

**I. Team Concepts**

- A. Importance of Teams in Today's Global Economy
- B. Diagnosing and Assessing Teams in the Culture of Poland
- C. Groups and Group Dynamics
- D. Stages of Group Development
- E. Definition of a Team
- F. Distinguishing a Group from a Team
- G. Different Types and Purposes of Teams
- H. Fitting Teams into a Larger Organization Context

## **Team Building - p. 2**

### **I. Special Team Issues for Entrepreneurs**

### **II. Leadership and Teams**

#### **A. Leadership Concepts**

#### **B. Effective Team Leadership**

#### **C. Pitfalls and Problems of Team Leaders**

#### **D. Development of Effective Team Leadership Skills**

### **III. Team Building Concepts and Strategies**

#### **A. Characteristics of Effective Teams**

#### **B. Blocks to Team Effectiveness**

#### **C. What is Team Building?**

#### **D. Strategies for Team Development**

### **IV. Key Tools for Team Effectiveness**

#### **A. Planning and Leading Effective Meetings**

#### **B. Structuring Team Roles**

#### **C. Group Planning and Problem-Solving Techniques (e.g., Brainstorming, Fishbone Diagrams)**

#### **D. Team Culture and Process Assessment**

#### **E. Constructive Management of Conflict**

### **Resources<sup>1</sup>**

**1. Francis, D. & Young, D. (1992) Improving Work Groups: A Practical Manual for Team Building (Revised). Pfeiffer & Co.: San Diego, CA. (Also contains training activities.)**

**2. Kouzes, J.M. & Posner, B.Z. (1987) The Leadership Challenge: How to Get Extraordinary Things Done in Organizations. Jossey-Bass: San Francisco, CA.**

3. Larson, C.E. & LaFasto, F.M.J. (1989) TeamWork: What Must Go Right/What Can Go Wrong. Sage: Newbury Park, CA.
4. Stewart, A. (1991) Team Entrepreneurship. Sage: Newbury Park, CA.
5. Katzenbach, J.R. & Smith, D.K. (1993) "The Discipline of Teams", Harvard Business Review, March-April, 111-120.
6. Chlewinski, Z. (1981) "Group and individual decisions in task situations: Aspirations and achievement. Polish Psychological Bulletin, 12, (2), 115-124.
7. Kilmann, R.H. (1984) Beyond the Quick Fix: Managing Five Tracks to Organizational Success. Jossey-Bass: San Francisco, CA  
Team Building - p. 3
8. Maier, N.R.F., Solem, A. and Maier, A. (1975) The Role Play Technique.
9. Orsburn, J. Moran, L. & Musselwhite, E. et al. (1990). Self-Directed Work Teams. Business One Irwin.
10. Buchholz, S. & Roth, T. (1987) Creating the High Performance Team. Wilson Learning Corporation.
11. Rees, F. 25 Activities for Team Building. Pfeiffer & Company, San Diego.
12. Sperry, L. et al. (1977) You Can Make It Happen. (Individual and Group Assessment Tools). Addison-Wesley, 1977.
13. Whetten, D.A. & Cameron, K.S. (1984) Developing Management Skills. Scott-Foreman: Glenview, IL.

**Recommended Assessment Tools:**

Leadership Practices Inventory (Self and Observers). Available from Pfeiffer & Co.

Team Review Survey. Available from Pfeiffer & Co.

<sup>1</sup> The first five references are priority resources and would serve as possible seminar texts and sources of training activities. They contain information of most of the key topics listed. The remainder provide important background and suggested training activities for seminar faculty.

## Recommended Assessment Tools

]

ed

# LEADERSHIP PRACTICES INVENTORY (LPI)

*James M. Kouzes and Barry Z. Posner*

Join the MILLIONS of others who use LPI to achieve extraordinary results!

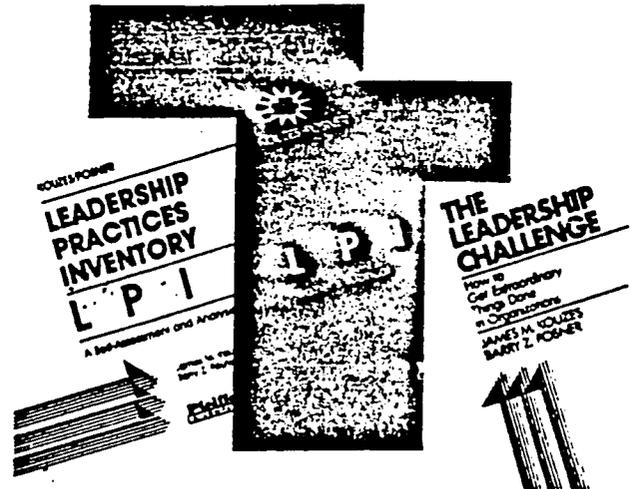
Based on extensive research, the LPI instruments and *The Leadership Challenge* book help leaders accomplish extraordinary feats through those they lead.

Use them to assess and develop the five key principles of effective leadership:

- Challenging the Process
- Inspiring a Shared Vision
- Enabling Others to Act
- Modeling the Way
- Encouraging the Heart

**BEST  
SELLER!**

Also, use the proven LPI methods to develop team leadership. See the **TEAM LPI** instrument on page 14.



## LPI

### Deluxe Trainer's Package

Included in this upgraded package is the new *LPI: Trainer's Package* plus a copy of the authors' book, *The Leadership Challenge*.

LPI Deluxe Trainer's Package—1993 Edition / Code 1030ESD / *The Leadership Challenge*, LPI: Self-Assessment and Analysis, LPI: Observer, LPI: Trainer's Manual (Revised) / \$59.95

## LPI

### Observer

Formerly titled LPI: Other, The anonymous perceptions of peers, combined with the manager's self-assessment, provide a clear picture of how the manager functions as a team leader. The *LPI: Observer* provides a balanced picture of leadership traits and allows for constructive discussion of ways to improve.

LPI: Observer—1993 Edition / Code 483ESD / 4 pages / nonreproducible / \$3.95 each / See Quantity Pricing **C**

## LPI

### A Self-Assessment and Analysis

This instrument has been expanded to include sections on comparing scores with the normative sample and sharing feedback with constituents and colleagues. The questions and scoring method are unchanged.

Managers will use this 30-item inventory to evaluate their own performance and effectiveness as leaders. When used in concert with the *LPI: Observer*, up to ten observers' scores can be combined with the self-assessment, and plans for improvement can be developed by the manager and team together.

LPI: Self—1993 Edition / Code 482ESD / one 4-page instrument plus 40-page participant's manual / \$9.95 each / See Quantity Pricing **J**

## LPI

### Trainer's Package

This revised package includes one of each of the new *LPI: Self* and *LPI: Observer* instruments and an expanded edition of the *LPI: Trainer's Manual*. The new *Manual* outlines a detailed workshop design with clear, step-by-step instructions for administering and processing the instruments. It also includes twice as many masters for creating overhead transparencies as the original version.

LPI Trainer's Package—1993 Edition / Code 1029ESD / 3 booklets: LPI: Self-Assessment, LPI: Observer, and LPI: Trainer's Manual (Revised) / \$34.95

## LPI

### Sampler

The *LPI Sampler* includes all three *Trainer's Packages*, with eight pieces in all:

- *LPI: Trainer's Package*
- *LPI—Delta: Trainer's Package*
- *Team LPI: Trainer's Package*

Order today, and start planning interventions that help people become extraordinary leaders! (Participant instruments sold separately.)

LPI Sampler / Code 767ESD / 3 Trainer's Packages: LPI: Trainer's Package, LPI-Delta: Trainer's Package, and Team LPI: Trainer's Package (8 pieces in all) / \$79.95 / **SAVE \$4.00**

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Order Form—Page 47

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**LPI-DELTA: Self**

Designed for leaders who have previously used the LPI: Self instrument, the LPI—Delta: Self can be used as a post-test or for ongoing assessment. It centers on the five key practices of successful leaders. This 30-item instrument includes instructions and forms for scoring, comparing scores with up to 10 observers, interpreting, and creating action plans.

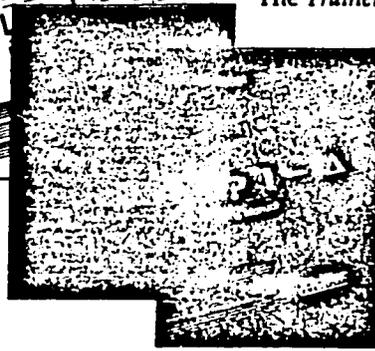
LPI—Delta: Self / Code 763ESD / one 4-page instrument plus 27-page participant's manual / **\$8.95 each** / See Quantity Pricing **M**



**LPI-DELTA  
Trainer's Package**

The *Trainer's Package* includes one copy each of *LPI—Delta: Self*, *LPI—Delta: Observer*, and the *LPI—Delta: Trainer's Manual*. The *Manual* contains validity and reliability data along with instructions on administering and processing the instruments.

LPI—Delta Trainer's Package / Code 765ESD / 3 booklets: LPI—Delta: Self, LPI—Delta: Observer, LPI—Delta: Trainer's Manual (57 pages, paperbound) / **\$29.95**



LPI—Delta: Observer / Code 764ESD / 4 pages / non-reproducible / **\$3.95 each** / See Quantity Pricing **C**

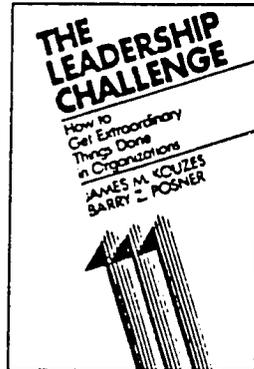


**LPI-DELTA: Observer**

A 30-item instrument, the *LPI—Delta: Observer* should be completed by subordinates, supervisors, and colleagues of the leaders taking the *LPI—Delta: Self* instrument. It measures the amount of noticeable change that has occurred over a period of time.

**THE LEADERSHIP CHALLENGE  
Videocassette**

Hosted by Kouzes and Posner, this video introduces four leaders/managers with inspirational stories. Each individual incorporates specific practices to inspire and motivate others toward extraordinary accomplishments. An invaluable addition to your training sessions, especially when you use the *LPI* instruments!



**THE LEADERSHIP CHALLENGE  
How to Get Extraordinary Things Done in Organizations**

This best-selling book examines the experiences of 500 managers at their personal best—leading others to extraordinary accomplishments.

You'll learn about the practices common to successful leaders, and gain a wealth of practical advice on how to instill these practices in yourself or your training partici-

Leadership Challenge / Code E76ESD / 367 pages / hardbound / **\$39.95**

**LPI-INDIVIDUAL CONTRIBUTOR (LPI-IC)**

The *LPI-IC* uses *Self* and *Observer* instruments show individuals and team members that leadership is a process of using abilities at all levels of an organization.

The *Self* instrument and guidebook help participants develop the five primary leadership characteristics. Instructions for scoring and interpretation are included. The companion *Observer* instrument helps participants gather perceptions from colleagues or supervisors who have observed their leadership abilities.

The *Trainer's Package* includes one *Self* instrument, one *Observer* instrument, and a *Trainer's Manual*.

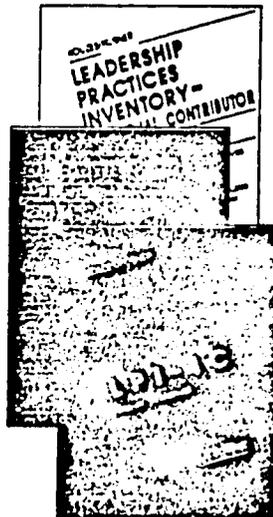
LPI-IC Self / Code 1039ESD / one 6-page instrument / one 40-page participant's manual / **\$8.95** / See Quantity Pricing **M**



LPI-IC Observer / Code 1040ESD / one 4-page instrument / **\$3.95** / See Quantity Pricing **C**



LPI-IC Trainer's Package / Code 1041ESD / 3 booklets: LPI-IC: Self, LPI-IC: Observer, and LPI-IC: Trainer's Manual (85 pages) / **\$34.95**



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**In A Hurry?** Order today. Have it tomorrow! See page 48.

25 activities plus effective techniques to build and maintain effective teams!

## IMPROVING WORK GROUPS

### A Practical Manual for Team Building (Revised)

Dave Francis & Don Young

Aimed at any manager, consultant, or employee responsible for developing effective teams, *Improving Work Groups* offers a step-by-step system for initiating and evaluating team performance. This popular book, recently revised, focuses on the underlying concepts of developing work teams.

It looks at:

- What a team really is
- Why teams should be built in the first place
- How teams are developed
- Who develops them, and
- How to measure and improve team effectiveness

*Improving Work Groups* brings an element of open, systematic planning and review to the task of team development. The book begins by offering general guidelines and identifying opportunities and potential pitfalls. It then explores the four stages of team development, followed by a sample of *The Team-Review Survey* (copies sold separately). This survey enables the team to determine its own unique strengths and weaknesses.

It concludes with 25 activities that enable the team to work through elements that inhibit its effectiveness. Included are one introductory activity and two activities to address each of the 12 possible blockages. The activities cover a wide range of

*Assess team effectiveness and overcome obstacles to performance*

## THE TEAM-REVIEW SURVEY

Dave Francis & Don Young

Adapted from Francis and Young's best-selling *Improving Work Groups*, this self-scoring instrument helps team members:

- Assess team strengths and weaknesses
- Identify blockages to high performance
- Determine whether the group has the desire and the energy to begin a team-building program
- Understand the characteristics of effective teamwork

*The Team-Review Survey* contains 108 statements that relate to team effectiveness. Team members that complete the survey give an accurate picture of what works and what doesn't in the day-to-day functioning of the team. That information is then used to create action plans for improvement. The entire exercise takes about two hours to complete.

IT'S EASY TO ORDER!

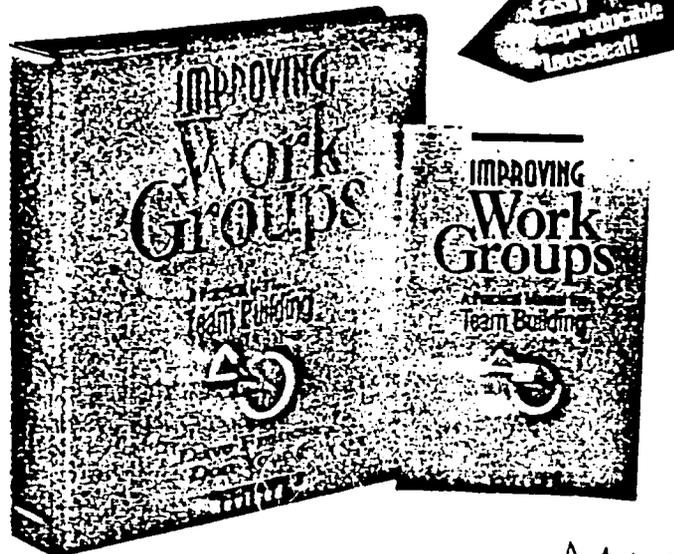
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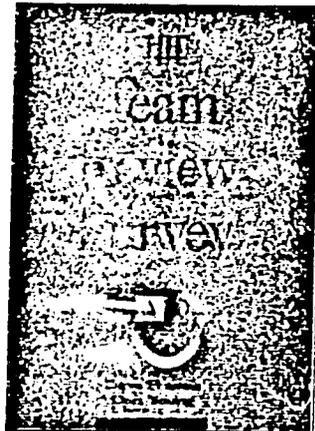
issues concerning team building, such as: setting objectives, analyzing the leadership function, team development stages, charting team success, and many more.

*Improving Work Groups* is available in two convenient formats—looseleaf to easily reproduce handouts, or paperback for portability. Any team manager—novice or seasoned veteran—will find it a valuable tool for developing teams that work together long into the future!

Free copy  
of Team Review  
Survey with  
purchase!

*Improving Work Groups (Revised)* Code  
1017ESD / 310 pages / looseleaf \$79.95

*Improving Work Groups (Revised)* Code  
1019ESD / 310 pages / paperback  
\$34.95



Use it to help participants assess team functioning, build on team strengths, and overcome obstacles to high performance!

*Team-Review Survey* Code  
1020ESD / 14 pages / paperback  
/ \$7.95 each / See Quantity  
Pricing ☐

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## CURRICULUM VITAE

**Name:** LEWICKI, Roy James

**Business Address:** College of Business  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
614-292-0258

### Educational Background:

<b>Institution</b>	<b>Date</b>	<b>Degree</b>	<b>Major Field</b>
Dartmouth College Hanover, New Hampshire	6/64	A.B.	Psychology (Graduated with Honors)
Columbia University Teachers College New York, New York	12/68	Ph.D.	Social Psychology

### Professional Positions:

1991-1992 Academic Director for Executive Education  
College of Business  
The Ohio State University

1984-1991 Associate Dean for Graduate Business Programs and  
Executive Education  
College of Business  
The Ohio State University

1987- Professor of Management and Human Resources  
College of Business  
The Ohio State University

1984-1987 Associate Professor of Management and Human Resources  
College of Business  
The Ohio State University

- 1979-1984 Associate Dean, Academic Programs  
Director of the M.B.A. Program and  
Assistant Dean for Student Affairs  
Fuqua School of Business  
Duke University
- 1977-1984 Associate Professor of Business Administration,  
Duke University
- 1972-1977 Associate Professor of Business Administration  
Amos Tuck School of Business Administration  
Adjunct Associate Professor of Psychology  
Dartmouth College
- 1968-1972 Assistant Professor of Administrative Sciences  
and Psychology  
Department of Administrative Sciences,  
Yale University

### **Professional Memberships:**

Academy of Management  
American Psychological Society  
American Psychological Association  
Organizational Behavior Teaching Society  
Society for Business Ethics  
Society for the Psychological Study of Social Issues  
American Arbitration Association (Panel Member)  
Community Mediation Services, Columbus, Ohio (Volunteer Mediator)

### **Awards:**

The David L. Bradford Outstanding Educator Award, Organizational Behavior Teaching Society, 1988 (first recipient), for contributions to pedagogy in negotiation and dispute resolution.

Best Paper Award, "Lies and Dirty Tricks: Perceptions of Marginally Ethical Negotiation Tactics" (with G. Spencer), International Association of Conflict Management Annual Meetings, June 1990.

Best Paper in 1992 Award, "Models of Conflict, Negotiation and Conflict Intervention: A Review and Synthesis" (with S. Weiss and D. Lewin), awarded by the Journal of Organizational Behavior.

### **Teaching Interests:**

Bargaining, Negotiation and Conflict Management  
Power and Influence  
Executive Leadership

Small Group Dynamics and Interpersonal Behavior--Theory and Practice  
Organizational Development and Organizational Change  
Managerial Psychology and Organizational Behavior--Undergraduate, Graduate  
and Executive

**General Research Interests:**

Bargaining, Negotiation and Conflict Management  
Ethical Decision Making in Organizations, particularly Negotiations  
Fairness and Organizational Justice Systems  
Psychological Commitment and Entrapment  
Character and Executive Leadership

**Editorial and Professional Boards:**

**Current:**

Associate Editor, *Academy of Management Executive*, 1993-  
International Advisory Board, *The Negotiation Journal*, 1986-  
Editorial Board, *Journal of Management Education*, 1983-  
Editorial Advisory Board, Jossey-Bass Series on Conflict Resolution, Jossey-  
Bass Publishing Co., San Francisco, CA.  
Editorial Board, *International Journal of Conflict Management*, 1989-92.

**Past:**

Editorial Board, *Academy of Management Executive*, 1987-1988  
Editorial Board, *Journal of Experiential Learning and Simulation*, 1978-1981  
Academic Council, Institute of Certified Travel Agents, Boston, MA, 1986-1991.  
External Advisory Board, School of Natural Resources, The Ohio State  
University, 1986-1987.  
Graduate Management Admissions Council, Research Committee, 1985-1987

**Periodic reviewer of proposals and articles:**

National Science Foundation, Canadian Research Council

Annual Meetings of the Academy of Management, International Association  
of Conflict Management, Organizational Behavior Teaching Society, Institute for  
Decision Sciences, American Psychological Association, National Institute for  
Dispute Resolution.

*Academy of Management Journal*, *Academy of Management Review*, *Academy  
of Management Executive*, *Organizational Behavior and Human Decision  
Processes*, *International Journal of Conflict Management*, *Journal of Applied  
Social Psychology*, *Journal of Management Education*, *Journal of Organizational  
Behavior*, *Journal of Personality and Social Psychology*, *Management Science*,  
*Negotiation Journal*.

Richard D. Irwin, John Wiley, Scott Foresman

**Grants:**

Co-Principal Investigator, Hewlett Foundation Grant to the Ohio State University for dispute resolution activities, 1992-1994, \$200,000 per year for two years.

Co-Principal Investigator, Interdisciplinary Research Grant, Office of Research, The Ohio State University. To investigate the dynamics of dispute framing and reframing in the resolution of land use and water quality natural resources disputes, \$38,000 for 18 months.

**Recent Professional Service:**

First Chairperson, Professional Interest Group on Power, Negotiation and Dispute Resolution, Academy of Management, 1986-7. Led organizing effort during 1985-6 to have this group recognized as a formal Interest Group by the Academy. Steering Committee Member, 1987-88, 1988-89, 1989-90. Co-coordinated effort to achieve Divisional status, 1989-1991.

Columbus Council for Ethics in Economics. Steering Committee, Honesty Project, 1992-1994. Chairman, Honesty Project, 1989-1991. Member, Steering Committee and Chairman of the Case Teaching team, 1992 International Conference on Business Ethics in a Global Environment. Member of the Consultation Team. Have taught ethics cases and given many presentations on behalf of the Council, 1987-1993.

Principal, The Leadership Council, San Francisco, California. A consortium of business leaders and practitioners committed to research, publication and training about the relationship between personal ethics, character and leadership.

Co-developer of a curriculum on Negotiation and Dispute Resolution for the National Institute for Dispute Resolution, Washington, D.C.

Co-chair (with M. Bazerman, R. Bies and B. Sheppard) of the leading invited research conference on negotiation and dispute resolution. Boston University, 1982; Duke University, 1985; Ohio State University, 1987; Northwestern University, 1989; Duke University, 1991; Georgetown University, 1993.

Chairperson, Panelist, Workshop Leader and Discussant at sessions of the Organizational Behavior Teaching Conference (Topics include the introductory OB course, experiential education, executive education, evaluation and grading practices, structuring courses in bargaining and negotiation, managing classroom problems, teaching values in organizational behavior, managing sexism and racism in the classroom, and the future of teaching in the organizational behavior field.)

**Administrative Responsibilities at Ohio State University (1991-2):**

Academic Director of Executive Education. Responsible for the general oversight and program development within the College's Executive Education Division.

**Administrative Responsibilities at Ohio State University (1984-1991):**

Associate Dean for Graduate Business Programs and Continuing Education (1984-91). Responsibilities included:

1. MBA Programs. Supervised three professional staff and clerical staff. Admissions, Student Affairs, Academic Oversight, and MBA Placement functions. Three MBA Programs, Master of Arts Program, 450 students in residence.
2. PhD Program in Business Administration. Supervised one professional staff and clerical staff. Admissions and student affairs. 100 students in residence.
3. Executive and Continuing Education. Supervised six professional staff and clerical staff, repertoire of continuing education programs. \$1.5 million annual budget.
4. Faculty Research Committee
5. Dean's Executive Committee

Member of Dean's Council, four standing faculty committees, several University Committees.

**Selected Review of Administrative Activities and Accomplishments:**

Ohio State University and National Activities:

- Chairman, Selection Committee, AACSB-NDFP National Doctoral Fellowship Program, 1989-90.
- Invited Plenary Speaker on Executive MBA Programs, AACSB Conference, 1989.
- Instructor, GMAC Colloquium for Admissions and Student Affairs Officers, 1988 and 1989.
- Research Committee, Graduate Management Admissions Council, 1985-1987. Declined offer of chairmanship.
- Oversight Committee, AACSB-GMAC National Doctoral Fellowship Program, 1989.
- Invited External Advisory Committee, School of Natural Resources, The Ohio State University.
- University Committee on Writing Effectiveness, The Ohio State University, 1988-89.
- Distinguished Scholar Selection Committee, Ohio State University, 1989-90

12

College:

Chaired Strategic Planning Committee, 1988-89. Drafted Strategic Plan, Faculty Poll on College Priorities.  
Drafted Capital Campaign Plan.  
Major contribution to AACSB Accreditation reports.  
Major contribution to Program Review by The Ohio State University.  
Major contribution to facilities redesign plans for College buildings.  
Search Committees for Associate Dean for Undergraduate Studies, Assistant Dean for External Affairs.  
Authorship and oversight of numerous College and faculty grant proposals; ex-officio member of College Research Committee.  
Numerous faculty Promotion and Tenure committees.

MBA Programs:

Full-time program doubled in size and increased significantly in quality during tenure.  
Oversight of major curriculum revision for MBA Program, including integration of personal computers into the curriculum.  
Introduction of Evening MBA Program.  
Withdrawal of Executive MBA Program.  
Development of combined degree programs, 3/2 program.  
MBA Program Strategic Plan.  
Development of pre-enrollment review courses which significantly reduced attrition.  
College Representative, Graduate Management Admissions Council.

Ph.D. Programs:

Oversight of major curriculum revision.  
Liaison to National Doctoral Fellowship Program.  
Primary liaison to University Graduate School.  
Oversight of numerous program policy initiatives and reforms.

Executive Education:

Significant experience in open-enrollment and customized program design and development, including the College's Executive Development Program.  
Coordinated national search for two new Directors, Marketing Director.  
Major revision of College policies for faculty compensation.  
Enhanced role of Academic Program Coordinators in programs.  
Authorship of numerous program policy initiatives and reforms.

**Recent Research Seminars Presented:**

Kellogg Graduate School of Management, Northwestern University; Graduate School of Management, Georgetown University; Department of Administrative Sciences, York University; Institute for Labor Relations, Queens University; Graduate School of Business, Boston University.

**Recent Executive Development and Consultation Activities:**

**Applied Workshops in Conflict Management and Negotiation Skills:**

Young Presidents Organization, Borden Corporation, Marathon Oil, Bank Administration Institute, Crowe Chizek, Hobart Management Institute, Red Roof Inns, Ross Laboratories, Council on Foundations, Price Waterhouse, Eastman Kodak Company, Federal Home Loan Bank, IBM Corporation, Control Data Corporation, Holiday Inns, Institute of Certified Travel Agents, Eli Lilly Corporation, Police Executive Research Forum, Gulf Oil Corporation, Diamond Shamrock Corporation, First Union National Bank, National Training Laboratories, Honeywell Corporation, Richard D. Irwin, D.C. Heath.

**General Management Development Programs:**

Maxus Energy Corp., Eli Lilly, Reynolds + Reynolds, FISIONS Scientific Equipment, Westinghouse Corporation, Frito Lay Corporation, Battelle Memorial Institute, Ohio State University College of Business, Ohio State University School of Public Administration, Duke University Executive Programs, Holiday Inns, Crown Life of Canada, Canadian National Railways, IBM Corporation, Graduate School of Credit and Financial Management, National Association of Credit Management, Council for the Advancement and Support of Education, and Outward Bound, Inc.

Consultant to the National Institute For Dispute Resolution, Washington materials for teaching negotiation and dispute resolution in management education.

Consultant to Settlement Week, effort by the Columbus Bar Association to use alternative dispute resolution techniques to clear calendar of the Columbus Court of Common Pleas. Training staff for mediator training, observed and critiqued effectiveness of Settlement Week activities, addressed ADR Committee of the Bar Association several times on the experiment. Addressed National Settlement Week Evaluation Conference, July 1986.

Organization Diagnosis and Development--Olin Corporation, Outward Bound, Inc., the towns of Newport and Bristol, New Hampshire, and numerous organizations, public school systems and community agencies.

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## Publications

### Books

- Hornstein, H.A., B. Bunker, W. Burke, M. Gindes and R.J. Lewicki. Social Intervention: A Behavioral Science Approach. New York: Press, 1971.
- Hall, D.T., D.D. Bowen, R.J. Lewicki and F. Hall. Experiences in Management and Organizational Behavior. Chicago: St. Clair Press, 1975. Second Edition, John Wiley & Sons, 1982.
- Lewicki, R.J., D.T. Hall, D.D. Bowen and F. Hall. Experiences in Management and Organizational Behavior, Instructor's Manual. Chicago: St. Clair Press, 1975. Second Edition, John Wiley & Sons, 1982.
- Bazerman, M. and R.J. Lewicki (Eds.) Negotiating In Organizations. Beverly Hills: Sage Publications, 1983.
- Lewicki, R.J. and J. Litterer. Negotiation. Homewood, IL: Richard D. Irwin, 1985.
- Lewicki, R.J. and J. Litterer (Eds.) Negotiation: Readings, Exercises, and Cases. Homewood, IL: Richard D. Irwin, 1985.
- Brett, J., L. Greenhalgh, D. Kolb, R.J. Lewicki and B.H. Sheppard. The Manager as Negotiator and Dispute Resolver. Washington, D.C.: National Institute for Dispute Resolution, 1985.
- Lewicki, R.J., B.H. Sheppard, and M. Bazerman (Eds.). Research on Negotiation in Organizations. Vol. 1. Stanford, CT: JAI Publishing Co. 1986.
- Lewicki, R.J., D.D. Bowen, D.T. Hall and F. Hall. Experiences in Management and Organizational Behavior. New York: John Wiley. Third Edition, 1988.
- Lewicki, R.J., D.D. Bowen, D.T. Hall and F. Hall. Experiences in Management and Organizational Behavior, Instructor's Manual. New York: John Wiley, 1988.
- Sheppard, B.H., M.A. Bazerman and R.J. Lewicki. (Eds.). Research on Negotiation in Organizations. Vol. 2. Stanford, CT: JAI Publishing, 1990.
- Bazerman, M., R.J. Lewicki and B.H. Sheppard. (Eds.). Research on Negotiation in Organizations. Vol. 3. Stanford, CT: JAI Publishing, 1991.
- Sheppard, B.H., R.J. Lewicki and J. Minton. Justice in Organizations. Lexington, MA: Lexington Books, 1992
- Lewicki, R.J. , J. Litterer, D. Saunders and J. Minton. Negotiation: Readings, Exercises and Cases. Second Edition. Richard D. Irwin, 1993.



Roy J. Lewicki  
Fisher College of Business  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
Phone 614-292-0268  
Home/Fax 614-489-0548

Ms. Elzbieta Jacowicz  
Program Associate  
Center on Education and Training for Employment  
1900 Kenny Road  
CAMPUS

Dear Elzbieta:

I am sorry for the incredible delay in getting this information to you. I have had a terrible Fall, with other projects pressing very hard and leaving me no time to work on the seminar topics for the Polish faculty seminar on negotiation.

Let me suggest the following key topics and resources. This will be ambitious but possible in several days. This list can be quickly modified (both expanded and reduced), based on what the group would like to learn. Please contact me after you have had a chance to review this list and we can talk about changes and modifications.

Key Topics:

1. Conflict and Conflict Management in Business

- Causes of Conflict
- Conflict Management Processes
- Conflict Resolution Processes:
  - What the parties can do themselves
  - What third parties can do

2. Negotiation as a Process for Managing Conflict

- Interdependence
  - Experimental games
  - Basic Exchange Theory

3. Negotiation Strategies

- Distributive, win-lose negotiations
  - Strategy and Tactics

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- Integrative, win-win negotiations
  - Strategy and Tactics
- Role plays and simulations to illustrate principles
- 4. Planning Negotiation Strategy
  - Planning models and guidelines
- 5. Personality Differences and Applications to Negotiation
  - Conflict Management or Negotiator Style
  - FIRO-D Instrument
- 6. Lying, Deception and Negotiator Ethics
  - Questionnaire and discussion.
- 7. Strategies for Managing "Deadlocked" Negotiations
- 8. How to Teach Negotiations
  - Teaching approaches
  - Possible course designs
  - Teaching resources
  - Practice teaching experiences.

**Books and Resource Materials:**

**Negotiation, 2nd Edition.** Roy J. Lewicki, Joseph Litterer, John Minton and David Saunders. Available March 1, 1994. Richard D. Irwin Publishers, 1333 Burr Ridge Parkway, Burr Ridge, IL 60521

**Negotiation: Readings, Exercises and Cases, 2nd Edition.** Roy J. Lewicki, Joseph Litterer, David Saunders and John Minton. 1993 (available now.) Richard D. Irwin Publishers, 1333 Burr Ridge Parkway, Burr Ridge, IL 60521  
Instructors Manual also available to adopters.

Photocopy materials of role plays, resource materials and selected articles.

Sincerely,

Roy J. Lewicki

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**OLD DOMINION UNIVERSITY**

Department of Occupational and Technical Studies  
Norfolk, Virginia 23529

**MEMORANDUM**

**TO:** Elzbieta Jacowiz

**FROM:** John E. Turner, Project Consultant *John*

**SUBJECT:** Response to request for suggested topical outline for sales training and sales management course for implementation in Poland.

**DATE:**

Attached please find a recommended topical outline for consideration when developing the sales training and sales management course(s) for implementation in Poland. It is unlikely that all of this material could be adequately covered by instructors and absorbed by students within a 12-15 hour course. Therefore, when these suggested topics are considered by the coordinators and instructors developing the course, it will be necessary to choose topics and presentation sequence according to the specific objectives established for the course.

Based on my understanding of the need for this content in the Polish business environment, I recommend that you consider offering two separate courses, one for salespeople and a separate course for sales management personnel. If trainees need both topics, then recommend both classes, in sequence, with the basic sales training class offered first. This way, sales managers will have the same basic understanding of the selling process as their sales staff. In the event that instruction in both sales training and sales management must be undertaken within the same course, a very basic approach will be needed.

There are a large number of references that may be considered for both sales training and sales management, however, I believe the two suggested are the best for use by the instructors and coordinators while developing the course materials. Both provide a comprehensive yet practical perspective on each of the topics: sales training and sales management. It may be necessary to reconsider resources when seeking material for student use.

Please advise if you need clarification on any of the topics or the two suggested references.

**Attachment:**

## PERSONAL SELLING

(Suggested Topics for possible inclusion in a 12-15 Hour Sales Training/Sales Management Course for adults)<sup>1</sup>

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### Part I: The Role of Personal Selling in a market economy

- A- The Marketing Concept (Brief review or Introduction)  
(i.e. consider the client/consumer first to determine needs and wants, then manufacture, distribute, and retail)
- B- Personal Selling As an Extension of The Marketing Concept  
(Placing the consumers' needs and wants first)
- C- Personal Selling as A Key Component of the Promotion Mix  
[Promotion mix = advertising, sales promotion, publicity, and personal selling]
- D- Sales philosophy: [recommend a consultative approach]
  - 1- The salesperson as problem solver, providing solutions to client/consumer problems
  - 2- The salesperson as market researcher, providing feedback link from client/customer

### Part II: The Salesperson: Presenting a Positive Sales Image

- A. Positive first impressions [appropriate attire and grooming, prompt arrival, and consideration of clients schedule]
- B. Effective Communications [i.e. meanings are in people not in words, symbols, or gestures]  
  
[Sender-encoding-media-decoding-receiver]  
+ (Barriers to effective communication)
  - 1- Verbal
    - a- oral (e.g. word choice, to joke or not to joke, appropriate topics, etc.)
    - b- written (e.g. letter writing, form, timing, legibility on order forms and reports, etc.)
  - 2- Non-verbal communications
    - a) The handshake (culture dependent)
    - b) Where to look (culture dependent)
    - c) Facial expressions, posture, and gestures

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<sup>1</sup>John E. Turner, Consultant, Norfolk, Virginia, 29 November 1993.

- C. Protocol: When to Pay for Lunch, bring gifts, etc.
- D. Building Lasting Sales Relationships
- E. Effective time management
  - 1- Focus (e.g. 20 % of customers contribute 80% of sales volume)
  - 2- Organizing and using sales records
  - 3- Analyzing sales records to facilitate future sales
  - 4- Personal time management

### Part III: Your company, product(s), and competition

- A. Know your company: Goals, strengths (competitive advantage), and historical perspective.
- B. Product and service knowledge: Attributes, uniqueness, how to operate, service procedures, warranties, etc.
- C. Strengths and vulnerability of competition

### Part IV: Your Customer (individual or company)

- A. Business clients
  - 1- Locating prospects
  - 2- Qualifying prospects
  - 3. Important information
    - a- Historical perspective of clients company
    - b- Clients company goals and operating procedures
    - c- Understanding problems facing your client
    - d- Assisting your client with problem resolution
- B. When your clients are the ultimate consumers
  - 1- Determining consumer needs and wants
  - 2- Understanding consumer motivation to buy
    - a) Psychological motives
    - b) Social factors
    - c) Self esteem and self actualization
  - 3- Influences on consumer decisions
    - a) Family influence
    - b) Significance of roles
    - c) Social class
  - 4- Helping consumers find solutions (using knowledge from B.1-3 to help the consumer solve problems)

### Part V: Effective Presentation

- A. Preparation
- B. The sales presentation
  - 1- setting and tone (consultative)

- 2- Use of props and models
- 3- Sales presentation model [Introduction, body (information plus presentation/demonstration), closing]

C. After the sale (follow through with additional suggestive selling)

D. Maintaining positive client/customer relationships

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Recommended Reference:

Gerald L. Manning and Barry L. Reece, Selling Today, a Personal Approach, 5th. ed., William C. Brown Publisher, Dubuque, Iowa, 1992.

## MANAGING A SALES TEAM

### Part I: Locating and hiring the sales team

- A. Using task analysis and job specification to establish requirements.
- B. Sources of applicants
- C. Selection based on job specification and applicant credentials

### Part II: Training and motivating

- A. Orientation training
- B. Ongoing training updates (e.g. who is responsible?, how will training needs be determined?, who will develop training materials?, who will present training?, etc.)
- C. Providing a positive motivational environment
  - 1- Providing clear job descriptions and assignments (for sales and sales supporting staff and making sure everyone is aware of each individuals assignment and achievements)
  - 2- Team building
  - 3- Compensation plans
  - 4- Benefit packages
  - 5- Non-financial incentives
- D. Measuring performance and connecting to compensation

### Part III: Territorial development and management

- A. By geographical regions
- B. By product line(s)
- C. Combination
- D. Planned competitiveness/rewards by region

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#### Recommended references:

Gilbert A. Churchill, Jr., Neil M. Ford, Orville C. Walker, Jr., Sales Force Management, 4th. ed., Irwin Publishing Co., 1993.



**APPENDIX**

**4.0**

**SUPPORT  
INSTITUTE  
LEADERSHIP**

# Bialystok

**MONTHLY ACTIVITY REPORT**  
July 1993

1. Coordinators visit in the U.S.A. - participation in the 38th World Conference of International Council for Small Business, Las Vegas 1993
2. Plans for 3-rd year of BI Project:
  - satellite centers: in Suwałki, Łomża and Bielsk Podlaski,
  - workshops for faculty: Finance (November 1993) and Entrepreneurship (February 1994),
  - new seminars: Negotiations, Human Resource Management
  - e-mail
3. Interviews for two local newspapers (*Kurier Poranny, Gazeta Wyborcza*).
4. We organized special dinner for entrepreneurs. We gave them certificates of participation in "Training for Entrepreneurs" course.
5. We organized two tax courses for Zakład Energetyczny Białystok Enterprise:
  - June 24-25th ..... 40 persons x 8 hrs = 320 hrs
  - July 5-6th..... 40 persons x 8 hrs = 320 hrs
6. We organized tax course for Polmozbyt Enterprise
  - June 30th - July 1st ..... 30 persons x 8 hrs = 240 hrs

Coordinator

  
Andrzej Jurgilewicz

**Raport z działalności  
Sierpień 1993**

1. Zorganizowanie bezpłatnego seminarium na temat przekształceń własnościowych dla Zakładu Energetycznego Białystok (6 godzin x 15 uczestników = 90 godzin).

2. Wywiad dla lokalnej gazety "Niwa".

3. Satelity

A. Wizyta w Łomży i rozmowy z lokalnymi instytucjami szkolącymi. Wybór Domu Inicjatyw Lokalnych jako partnera do realizacji projektu.

B. Przeprowadzenie rozmów w Białku Podlaskim dotyczących realizacji projektu utworzenia ośrodka satelitarnego.

4. Organizacja nowej siedziby Instytutu

koordynator

*Andrzej Jurgilewicz*  
Andrzej Jurgilewicz

**BIALYSTOK SCHOOL OF BUSINESS  
ENTREPRENEURSHIP INSTITUTE**

**MONTHLY ACTIVITY REPORT  
August 1993**

1. We organized free seminar (ownership transformations) for "Zakład Energetyczny Białystok" plant (6 hrs. x 15 participants = 90 t-hrs.).

2. Interview for local newspaper "Niwa".

3. Satellite centers

A. Visit in Łomża - we chose House of Local Initiatives as a local partner

B. Visit in Białka Podlaska - we were looking for local partner and accommodations

4. We organized new EI office

Coordinator

*Andrzej Jurgilewicz*  
Andrzej Jurgilewicz

**Raport z działalności  
Wrzesień 1993**

1. Organizacja oddziałów Instytutu Przedsiębiorczości w Suwałkach, Łomży i Bielsku Podlaskim
  - A. Podpisanie porozumienia z Domem Inicjatyw Lokalnych w Łomży
  - B. Podpisanie porozumienia z Izbą Rolniczo-Turystyczną w Suwałkach
  - C. Przeprowadzenie rozmów z władzami lokalnymi w Bielsku Podlaskim - organizacja siedziby w Banku Spółdzielczym
2. Zmiana siedziby Instytutu; nowy adres: 15-875 Białystok  
ul. Krakowska 5  
tel. 236-21 w. 56
3. Opracowanie projektu Białostockiego Informatora Bankowego - konsultacje z pracownikami banków
4. Promocja kursu "Trening Przedsiębiorców" - ogłoszenia w prasie i radio

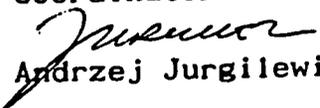
**BIAŁYSTOK SCHOOL OF BUSINESS  
ENTREPRENEURSHIP INSTITUTE**

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**MONTHLY ACTIVITY REPORT  
September 1993**

1. Satellite cities project
  - A. We signed agreement with House of Local Initiatives in Łomża
  - B. We signed agreement with Chamber of Tourism and Agriculture in Suwałki
  - C. We had meetings with local authorities in Bielsk Podlaski -  
- we organized Entrepreneurship Institute in the local bank
2. We change site of Institute in Białystok; our new address:  
15-875 Białystok, ul. Krakowska 5, ph. 236-21 ex. 56
3. We were working on idea of Białystok Banks Catalogue
4. We started to promote of "Training for Entrepreneurs" [basic course] - advertising in newspapers and local radio.

Coordinator

  
Andrzej Jurgilewicz

### Quarterly Report

Location: BIALYSTOK ENTREPRENEURSHIP INSTITUTE

Dates: JULY - SEPTEMBER, 1993

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship						
Marketing						
Management						
Finance						
Strategic Planning						
Export/Import						
Faculty Training						
Bankers/Government						20
Media						6
Business Start-up						
Students (Traditional)						
Business Managers		June 24-25 July 5-6 July 30-26 July 8	8 8 8 6	40 40 30 15	320 320 240 90	30 30 10 1
Other (Describe on back)						
Other (Describe on back)						
<b>TOTAL:</b>					970	106

# Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe

Institution: BIALYSTOK ENTREPRENEURSHIP INSTITUTE

Quarter: JULY-SEPTEMBER

Quarter: 1993

Contact Person Regarding this Report ANDRZEJ JORGILEWICZ

Project Component \_\_\_\_\_

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

1076

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	_____
Students (Traditional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	_____
Government Officials	<input type="text"/>	<input type="text"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>	<u>BIALYSTOK</u> <span style="font-size: small;">SUNARCI TOMZA BIELSK POOL</span>
Business Community/ Business Managers	<input type="text" value="970"/>	<input type="text"/>	<input type="text" value="80"/>	<input type="text"/>	<input type="text"/>	<u>BIALYSTOK</u>
Journalists - Media	<input type="text"/>	<input type="text"/>	<input type="text" value="6"/>	<input type="text"/>	<input type="text"/>	<u>BIALYSTOK</u>
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	_____
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	_____
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	_____

COMMENTS:

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## **Planned Courses - Białystok Entrepreneurship Institute**

### **BIAŁYSTOK**

**Basic Courses - "Training for Entrepreneurs" - 120 hours**

1. Oct. 21st, 1993 - Jan. 28th, 1994
2. Nov., 1993 - Feb., 1994
3. Jan. - March
4. March - June
5. April - June
6. Sept. - Dec.

**Courses for Managers - Oct., 1993 - June, 1994**

1. Management - 72 hours
2. Finance - 57 hours
3. Marketing - 37 hours
4. Entrepreneurship - 42 hours
5. Strategic Planning - 24 hours
6. Import/Export - 12 hours

### **Workshops**

1. Finance Course Faculty Upgrade Seminar - Nov. 18th-20th, 1993
2. Entrepreneurship Course Faculty Upgrade Seminar - Feb., 1994
3. New Seminar Workshops for Faculty [6 topics] - Apr., May 1994

**New Seminars - May-June, 1994**

### **SUWAŁKI**

1. "Training for Entrepreneurs" - Feb.-May
2. One-day seminar - Nov.
3. 6-8 courses for start-up "Start in Business" [40 hrs.] -  
- Nov., 1993 - March, 1994

### **BIELSKOPODLASKI**

1. One-day seminar - Oct. 14th
2. Tax Course [2 days] - Nov.
3. Marketing Course [60 hrs.] - Dec.
4. Business Plan for Bankers Course [15 hrs.] - Dec.
5. Marketing and Management Course [50 hrs.] - Feb.
6. Human Resources Management Course [3 days] - March
7. "Start in Business" Course [70 hrs.] - Apr.-May
8. Marketing Course [3 days] - March-May

### **ŁOMŻA**

1. One-day seminar - Dec.
2. "Training for Entrepreneurs" - Feb.-May

# FINANCIAL PLAN

## Costs

I. July - December, 1993

	J	A	S	O	N	D	Total:
coordinators [2]	1900 [ 900]	11400 [5400]					
secretary [1]	300 [ 300]	1800 [1800]					
faculty • t-hours • other	- 1500 [1500]	- 1500 [1500]	300 1200 [1500]	450 1050 [1500]	750 750 [1500]	600 900 [1500]	2100 6900 [9000]
travels	100 [ 100]	600 [ 600]					
mats., maint., eq. • mats for courses • other	- 100 [ 100]	- 100 [ 100]	20 180 [ 200]	30 170 [ 200]	50 150 [ 200]	40 60 [ 100]	140 760 [ 900]
translations	- -	100 [ 100]	100 [ 100]	- -	- -	- -	200 [ 200]
promotion • ADV for courses • other	- - -	- 30 [ 30]	544 - [ 544]	- 30 [ 30]	544 - [ 544]	49 230 [ 279]	1137 290 [1427]
new office • rent-charge • furnitures	- - -	- - -	100 3408 -	100 3408 -	100 - -	100 - -	400 6816 -
<b>Total:</b>	<b>3900</b> [2900]	<b>4030</b> [3030]	<b>8152</b> [3644]	<b>7538</b> [3030]	<b>4644</b> [3544]	<b>4279</b> [3179]	<b>32543</b> 19327]
Finance Course Faculty Upgrade Seminar	-	-	-	-	4000 [4000]	-	-

[ ] - These costs will be covered by U.S.AID. Other costs will be covered from BEI reserve.

### Satelite Cities Project

	J	A	S	O	N	D	Total:
coordinators	-	-	[ 255]	[ 850]	[ 850]	[ 850]	[2805]
travels	-	-	[ 50]	[ 275]	[ 275]	[ 275]	[ 875]
equipment	-	-	-	[5100]	-	-	[5100]
others	-	-	-	[ 600]	[ 600]	[ 600]	[1800]
<b>Total:</b>	-	-	[ 305]	[6825]	[1725]	[1725]	10580]

**Estimated income from participants (3rd Year)**

**"Training for Entrepreneurs":**

5 courses x 18 participants x 250 USD = 22.500

**Courses for Managers:**

25 participants x 400 USD = 10.000

Additional costs = 3.700

**One Year Tax Course:**

20 participants x 450 USD = 9.000

Additional costs = 3.700

**Satelite Cities Activity:**

3 courses x 25 participants x 250 USD = 18.750

Total ..... 52.850

III-rd National Forum ..... 2.550

Reserve for 4th Year ..... 50.300

	J	A	S	O	N	D	Total:
coordinators [2]	1900 -	1900 -	1900 -	1900 -	1900 -	1900 -	11400 -
secretary [1]	300 -	300 -	300 -	300 -	300 -	300 -	1800 -
faculty • t-hours • other	- 750 -	- 750 -	300 450 -	450 300 -	450 300 -	300 450 -	1500 3000 -
travels	100 -	100 -	100 -	100 -	100 -	100 -	600 -
mats., main., eq. • mats for courses • other	- 50 -	- 50 -	20 80 -	30 70 -	30 70 -	20 30 -	100 350 -
promotion • ADV for courses • other	- - -	- 30 -	544 - -	- 30 -	- - -	- 230 -	544 290 -
rent-charge for office	100 -	100 -	100 -	100 -	100 -	100 -	600 -
Total:	3200 -	3230 -	3794 -	3280 -	3250 -	3430 -	20184 -

Total I, II & III: *80.000 [40.000]*

End of Reserve from 2nd Year

Satelite Cities Project

	J	A	S	O	N	D	Total:
coordinators	[1030]	[1030]	[1030]	[1030]	[1030]	[1030]	[6180]
travels	[ 550]	[ 550]	[ 550]	[ 550]	[ 550]	[ 550]	[3300]
"Training for Entrepreneurs" (facul., mat., ADV)	[3630]	[3630]	[3630]	[3630]	[3630]	[3630]	21780
other	[ 300]	[ 300]	[ 300]	[ 300]	[ 300]	[ 300]	[1800]
Total:	[5510]	[5510]	[5510]	[5510]	[5510]	[5510]	33060

II. January - June, 1994

	J	F	M	A	M	J	Total:
coordinators [2]	1900 [ 900]	11400 [5400]					
secretary [1]	300 [ 300]	1800 [1800]					
faculty • t-hours • other	900 600 [1500]	975 525 [1500]	825 675 [1500]	900 600 [1500]	975 525 [1500]	825 675 [1500]	5400 3600 [9000]
travels	100 [ 100]	100 [ 100]	100 [ 100]	100 [ 100]	400 [ 400]	100 [ 100]	900 [ 900]
mats, main., eq. • mats for courses • other	60 40 [ 100]	65 135 [ 200]	55 145 [ 200]	60 140 [ 200]	65 35 [ 100]	55 45 [ 100]	360 540 [ 900]
translations	100 [ 100]	- -	- -	- -	100 [ 100]	- -	200 [ 200]
promotion • ADV for courses • other	495 - [ 495]	- 230 [ 230]	698 - [ 698]	390 230 [ 620]	- - -	- 430 [ 430]	1583 890 [2473]
rent-charge for office	100 -	100 -	100 -	100 -	100 -	100 -	600 -
<b>Total:</b>	<b>4595</b> [3495]	<b>4330</b> [3230]	<b>4798</b> [3698]	<b>4720</b> [3620]	<b>4400</b> [3300]	<b>4430</b> [3330]	<b>27273</b> 20673]
Entrepreneurship Course Faculty Upgrade Seminar	-	4000 [4000]	-	-	-	-	-

Total I & II: 59.816 [40.000]

Satelite Cities Project

	J	F	M	A	M	J	Total:
coordinators	[1030]	[1030]	[1030]	[1030]	[1030]	[1030]	[6180]
travels	[ 550]	[ 550]	[ 550]	[ 550]	[ 550]	[ 550]	[3300]
seminars (faculty materials)	[ 300]	-	-	-	[ 100]	[ 200]	[ 600]
"Training for Entrepreneurs" (facul., mat., ADV)	-	[2420]	[2420]	[2420]	-	-	[7260]
others	[ 345]	[ 345]	[ 345]	[ 345]	[ 345]	[ 355]	[2080]
<b>Total:</b>	<b>[2225]</b>	<b>[4345]</b>	<b>[4345]</b>	<b>[4345]</b>	<b>[2025]</b>	<b>[2135]</b>	<b>19420]</b>

Total I & II (Satelite Cities Project): [30.000]

**Two years of BIAŁYSTOK BUSINESS SCHOOL**

**AMERICANS ARE PLEASED**

Last week, representatives of Białystok Business School (BBS) returned from a short visit in the U.S.A. They participated in the 38 CONFERENCE organized by the International Council for Small Business (ICSB). They had also the opportunity to discussed with the Ohio State University staff about their future cooperation.

The CONFERENCE was entitled "Free Trade: A Good Bet for Small Business" and attracted entrepreneurs, academics, representatives of governmental administrations represented countries from all of the world. Poland was represented by Białystok Business School, Polish-American Entrepreneurship Institutes in Rzeszów and Poznań, and Gdańsk Economic Foundation "Solidarność".

*This conference showed us how small business was organized and promoted in the World - said Bogusław Plawgo, the director of Białystok Business School. We made some very interesting contacts.*

Bogusław Plawgo expressed his opinion that the 41 ICSB CONFERENCE in 1996 might be organized in Gdynia. Such a proposal had already been submitted to The Business Council. But Poland had a strong competitor - Sweden.

After the CONFERENCE, the representatives of BBS spent some time with the Ohio State University staff to discuss the opportunity of expanding their cooperation in future. The BBC activities which had been developed up to the present were approved by the Ohio State University. As a result of their work, one of the best specialist in negotiation, prof. Ray Lewicki expressed his willingness to assist Polish coordinators in developing a seminar on negotiation.

Białystok Business School opened its door 2 years ago. Up till now, it has established 2-year Business Study, 1-year Professional School for Secretaries, Management and Tax Courses. Last Tuesday the first twelve participants of Taxes Classes passed their final exams.

Dwa lata Białostockiej Szkoły Biznesu

# Amerykani są zadowoleni

W ubiegłym tygodniu przedstawiciele Białostockiej Szkoły Biznesu wrócili z kilkunastodniowego pobytu w Stanach Zjednoczonych. Wzięli udział w 38. Konferencji Światowej Rady Małego i Średniego Biznesu. Rozmawiali także o dalszej współpracy z władzami Uniwersytetu Stanowego w Ohio.

W konferencji "Wolny handel - szansą dla małego biznesu" uczestniczyli m.in. naukowcy, przedsiębiorcy oraz przedstawiciele administracji rządowej z kilkudziesięciu krajów świata. Oprócz białostoczan obecni byli także przedstawiciele Instytutów Przedsiębiorczości z Rzeszowa i Poznania oraz Fundacji Gospodarczej "Solidarności" z Gdańska.

*Konferencja pokazała nam, w jaki*

*sposób jest organizowane wspieranie małego i średniego biznesu na świecie - powiedział "Porannemu" Bogusław Flawgo, dyrektor Białostockiej Szkoły Biznesu. Nawiązaliśmy ponadto wiele atrakcyjnych kontaktów.*

Zdaniem dyrekcji BSB 41. sesja Konferencji Światowej Rady Małego i Średniego Biznesu w 1996 r. mogłaby odbyć się w Gdyni. Taka propozycja została przyjęta przez Radę Biznesu. Polska ma jednak silną konkurencję w postaci Szwecji.

Po konferencji przedstawiciele BSB przebywali na Uniwersytecie Stanowym w Ohio. Rozmawiali o możliwości współpracy i finansowania szkoły oraz Instytutu Przedsiębiorczości. Dotychczasowa działalność Białostockiej Szkoły Biznesu została zaakceptowana przez Ohio State University. Świadczy o tym fakt, że najprawdopodobniej jeszcze w listopadzie bieżącego roku przyjedzie do Białogostoku Ray Lewicky, jeden z największych specjalistów w zakresie negocjacji.

Przypomnijmy, że Białostocka Szkoła Biznesu działa już 2 lata. Zorganizowała m.in. 2-letnie Policealne Studium Biznesu, roczną Profesjonalną Szkołę Sekretarek, Studium Menedżerskie oraz Studium Podatkowe. W miniony wtorek 12 pierwszych uczestników Studium Podatkowego zdało egzaminy.

KURIER PORANNY

July, 1993

**KURIER PORANNY**  
July 1993

**BIALYSTOK BUSINESS SCHOOL**  
**ENTREPRENEURSHIP INSTITUTE**

*For the fifth time again!*

**A TRAINING FOR ENTREPRENEURS**

a training for small business owners organized by Bialystok Business School in cooperation with the Ohio State University.

The training program includes:

- \* psychology
- \* taxes
- \* economic and labor law
- \* business plan
- \* finance
- \* marketing
- \* human resource management
- \* negotiation in business
- \* others

For further information: Bialystok, Krakowska 5. room# 607, phone# 236-21 ext. 56 or Wiejska 45E, phone/fax 219-45.

Białostocka Szkoła Biznesu  
INSTYTUT PRZEDSIĘBIORCZOŚCI



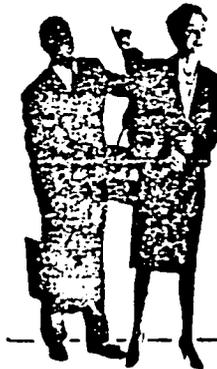
*Już po raz piąty !*

## **TRENING PRZEDSIĘBIORCÓW**

szkolenie dla właścicieli firm prywatnych organizowane wspólnie  
przez Białostocką Szkołę Biznesu i The Ohio State University.

W programie szkolenia między innymi:

- \* psychologia
- \* podatki
- \* prawo gospodarcze i prawo pracy
- \* biznes plan
- \* finanse
- \* marketing
- \* kierowanie ludźmi
- \* negocjacje w biznesie



Informacje: Białystok, ul. Krakowska 5 pok. 607, tel. 236-21 w.56  
lub ul. Wiejska 45 E, tel/fax 219-45

g 1143-1

KURIER PORANNY

July, 1993

Poznan

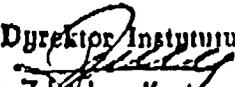
**Report on Activities of the Polish – American Enterprise Institute  
in Poznań  
July 1993**

1. On July 1993 an agreement was signed between the Polish – American Enterprise Institute in Poznań and the Konin Municipal Office, the Konin Agency for Agricultural Development and the Konin Centre on Perpetual Training. The agreement deals with the establishment of a subsidiary of the Institute in Konin.
2. Entering a more concrete and detail phase of the relationship between the Polish–American Enterprise Institute in Poznań and the Gniezno Municipal Office and the Regional Labour Office in Gniezno. An appropriate agreement will be signed in August.
3. The Municipal Office in Kutno requested establishment of a subsidiary of the Institute in Kutno. No decision concerning this matter has been made to date.

Dyrektor Instytutu  
  
dr Zdzisław Krajewski

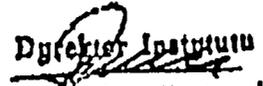
**REPORT**  
**on Polish – American Institute Activities,**  
**Poznań, August 1993**

1. In August the most popular Polish daily, "Gazeta Wyborcza", issued a special training appendix. The Polish – American Enterprise Institute placed its advertisement about the main course in this appendix.
2. The Institute negotiated with the Regional Development Agency in Zielona Góra the possibility of obtaining facilities for the Institute's satellite free of charge.

Dyrektor Instytutu  
  
dr Zdzisław Krajowski

**RELACJA**  
**on the Polish - American Institute Activities,**  
**Poznań, September 1993**

1. On September 9th, one of the Institute's teachers, Ryszard Mikołajczak, had a lecture in the Poznań Center on Entrepreneurship Assistance. The lecture, entitled: "Exchange Bill in Economic Turnover", attracted 20 participants.
2. The Polish - American Enterprise Institute joined the Association of Organizers of Innovation and Entrepreneurship Centres in Poland. The Association is headquartered in Poznań; its program includes:
  - \* cooperation with other governmental bodies, involved in supporting small and medium - sized companies,
  - \* organization of trainings on entrepreneurship,
  - \* establishing contacts with financial institutions and banks
  - \* preparation of programs aimed at entrepreneurship assistance
  - \* inspiring research on entrepreneurship.
3. On September 25th, the Institute's coordinators took part in a task force meeting in Warsaw.
4. On September 26th one of the Institute's teachers, Henryk Puzoski, had a lecture, entitled: "Competitive Personnel Selection in Small Companies". The lecture attracted 23 people.
5. On September 30th, 1993, the Institute's deputy director, Walery Lach, was called off.

  
Dyrektor Instytutu  
dr Zdzisław Krajewski

Quarterly Report

Location: *Posnan*

Dates: *1 July 1993 - 30 Sept. 93*

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship	-	-				
Marketing	-	-				
Management	-	-				
Finance	-	-				
Strategic Planning	-	-				
Export/Import	-	-				
Faculty Training	-	-				
Bankers/Government	-	-				
Media	-	-				
Business Start-up	-	-				
Students (Traditional)	-	-				
Business Managers		-				
* Other (Describe on back)	-	<i>9.18.93 28.18.93</i>	<i>7</i>	<i>43</i>	<i>301</i>	
Other (Describe on back)						

\* lectures of teachers from the Institute

## Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe

Institution: SBI Poznan-Poland

Quarter: I / III Year

Contact Person Regarding this Report: Z. Krupski / W. Lode

Project Component: Ohio State University

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value=""/>	
Students (Traditional)	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value=""/>	
Government Officials	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	
Business Community/ Business Managers	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	
Journalists - Media	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	
Other Groups/Individuals <i>Lectures of Teachers</i>	<input type="text" value="-"/>	<input type="text" value="....."/>	<input type="text" value=""/>	<input type="text" value="301"/>	<input type="text" value="-"/>	<u>Poznan</u>
<i>from the Institute</i> Other Groups/Individuals	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	
Other Groups/Individuals	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	<input type="text" value="-"/>	

COMMENTS:

*Check on indicators*

124

Entrepreneurship Promoting Center in Poznań

Poznań, October 21, 1993

POLISH-AMERICAN  
ENTREPRENEURSHIP  
INSTITUTE  
Powstańców Wielkopolskich  
61-895 Poznań

The Institute Director  
Mr dr Zdzisław Krajewski

By means of the letter I would like to express my appreciation for the preparation of presentations for our Center:

1. *Bill of exchange in economy turnover* gave by dr Ryszard Mikołajczyk (September 9, 1993) for 20 persons
2. *Competitive personnel selection in small companies* by dr Henryk Paszke (September 28, 1993) for 23 persons

I would like also to add that the participants found the presentations were interesting.

All the participants admired experience and knowledge the two members of your Institute faculty.

I believe that the participants will continue learning through participation in training organized by your Institute.

Hoping for future cooperation.

Sincerely,

Ireneusz Prutkowski  
Director



Rajonowy  
Urząd Pracy

# Poznański Ośrodek Wspierania Przedsiębiorczości

ul. Stary Rynek 52B 61-772 Poznań



Urząd Miasta

Poznań, dnia 21 października 1993 r.

RUP/VIII-0717/42/93

**POLSKO - AMERYKAŃSKI**  
**INSTYTUT PRZEDSIĘBIORCZOŚCI**

ul. Powstańców Wielkopolskich 16

61-895 POZNAŃ

Dyrektor Instytutu

Pan dr Zdzisław Krajewski

Pragnę złożyć Panu Dyrektorowi serdeczne podziękowania za okazaną współpracę przy organizowaniu prelekcji wykładowców z Pańskiego Instytutu:

- doktora Ryszarda Miłkołajczaka (w dniu 09 września 1993 r.)

prelekcja na temat "Weksel w obrocie gospodarczym."

obecnych było ok. 20 osób

- doktora Henryka Paszke (w dniu 28 września 1993 r.)

prelekcja na temat "Dobór kadr w warunkach konkurencji."

obecnych było ok. 23 osób

Chciałbym nadmienić, że powyższe prelekcje były prowadzone w interesujący sposób, co znalazło odzwierciedlenie w opiniach osób biorących w nich udział.

Uczestnicy wykładów podkreślali przede wszystkim bardzo dużą wiedzę, oraz doświadczenie prelegentów.

Mam nadzieję, że uczestnicy tych prelekcji będą w najbliższej przyszłości korzystać ze szkoleń organizowanych przez Pański Instytut.

Licząc na dalszą, owocną współpracę

pozostaję z szacunkiem

Kierownik Ośrodka

Ireneusz Prutkowski

## Umowa – porozumienie

Umawiające się strony:

Agencja Gospodarcza, Marketing – Doradztwo z siedzibą w Grodzisku. ul. Szeroka 1,  
reprezentowana przez dr Kazimierza Borowskiego, a

Polsko – Amerykańskim Instytutem Przedsiębiorczości w Poznaniu, reprezentowanym przez  
dr Zdzisława Krajewskiego

postanawiają:

1. Umowę – porozumienie strony podejmują w celu optymalizacji działań w zakresie przeprowadzania szkoleń i szeroko rozumianych form aktywizacji zawodowej, zwłaszcza wśród ludzi młodych w sferze small businessu.
2. Agencja Gospodarcza, Marketing – Doradztwo, będzie prowadziła promocję działalności Polsko – Amerykańskiego Instytutu Przedsiębiorczości w Poznaniu w swoim środowisku i będzie wykorzystywała potencjał specjalistów w ramach oferowanych usług Agencji.
3. Polsko – Amerykański Instytut Przedsiębiorczości w Poznaniu w miarę swych możliwości udostępni swoją bazę szkoleniową i materialną ( wg odrębnych ustaleń ), jak również, w miarę swoich możliwości przekaże zbędne urządzenia, materiały i środki na rzecz Agencji.
4. Umawiające się strony zobowiązują się do zacieśniania wzajemnych kontaktów, przepływu i wymiany merytorycznych informacji dla potrzeb i korzyści obojga stron.
5. Strony mogą odstąpić od współpracy, w drodze uzgodnienia i obustronnej akceptacji.
6. Umowę sporządzono w 2 jednobrzmiących egzemplarzach.

Poznań, 9 sierpnia 1993.

J. H. AGENCJA GOSPODARZA/  
MARKETING DORADZTWO

Kazimierz Borowski  
62-065 Grodzisk Wielkop. ul. St. Rynek 16/2  
tel./fax 461 7 85 Grodzisk Wielkop.

K-19 N. 2287-118-91  
WZAJNYCIEL FIRMY

dr Kazimierz Borowski

Dyrektor Instytutu

dr Zdzisław Krajewski

Polsko - Amerykański Instytut Przedsiębiorczości  
sponsor: US Agency for International Development  
ul. Powstańców Wlkp. 16, tel./fax 543521  
60-967 Poznań

U M O W A

zawarta w dniu ..1 lipca 1993 r. .... pomiędzy:  
Urzędem Miasta w Koninie, reprezentowanym przez:  
..Bronisława Różyckiego .. - V-ce Prezydenta Miasta Konina ..  
.....  
zwanym dalej Urzędem,  
Agencją Rozwoju Regionalnego S.A. w Koninie, reprezentowaną przez:  
..Łukasza Sroczyńskiego .. - Prezesa Zarządu - Dyrektora Spółki  
.....  
zwaną dalej Agencją,  
Centrum Kształcenia Ustawicznego w Koninie, reprezentowanym przez:  
..Mirosławą Szymczaką .. - Dyrektora Centrum  
.....  
zwanym dalej Centrum, oraz  
Polsko-Amerykańskim Instytutem Przedsiębiorczości, reprezentowanym  
przez:  
..Zdzisława Krajewskiego .. - Dyrektora Instytutu  
.....  
zwanym dalej Instytutem,  
o treści następującej:

§ 1.

Przedmiotem umowy jest wspólne przedsięwzięcie, polegające na zorganizowaniu i prowadzeniu filii Polsko-Amerykańskiego Instytutu Przedsiębiorczości w Koninie.

§ 2.

1. Podstawowym zadaniem Filii jest organizowanie i prowadzenie profesjonalnych szkoleń w zakresie przedsiębiorczości gospodarczej, adresowanych głównie do prywatnych przedsiębiorców prowadzących małe i średnie przedsiębiorstwa oraz osób zamierzających takie przedsiębiorstwa tworzyć. Filia realizować będzie również zadania informacyjno-konsultingowe z zakresu problematyki ekonomiczno-prawnej, związane z tworzeniem i prowadzeniem małych firm prywatnych.

Szkolenia i kursy prowadzone przez Filię organizowane są w zróżnicowanych formach średnio i krótkookresowych, dostosowanych do tematyki i lokalnych potrzeb regionu konińskiego. Wiążą się one z następującymi, głównymi profilami:

- warsztatami szkoleniowymi dla przedsiębiorców, obejmującymi niezbędną wiedzę do skutecznego zarządzania własną firmą w warunkach konkurencji,
  - specjalistycznymi szkoleniami w zakresie wybranych i dostosowanych do lokalnych potrzeb modułów tematycznych,
  - szkoleniem w zakresie elementarnej wiedzy o przedsiębiorczości dla osób zamierzających utworzyć własne przedsiębiorstwo,
  - szkoleniem specjalistycznym dla wybranych grup zawodowych.
2. W zakresie doboru tematyki szkoleniowej Filia wykorzystywać będzie przygotowywane programy szkoleniowe przez Instytut, propozycje i sugestie Agencji Rozwoju Regionalnego, władz samorządowych miasta Konina, Rejonowych Urzędów Pracy, a także wyniki prowadzonych przez siebie badań marketingowych.

### § 3.

1. Filia jest jednostką organizacyjną, działającą na zasadach prawnych i ekonomiczno-finansowych obowiązujących Instytut.
2. Filia jest organizacyjnie podporządkowana Dyrektorowi Instytutu.
3. Kierownika filii powołuje i odwołuje Dyrektor Instytutu.

### § 4.

We wspólnym przedsięwzięciu Urząd zobowiązuje się do:

- ogólnego patronatu nad przedsięwzięciami oraz pomocy w pozyskiwaniu sal dydaktycznych.

### § 5.

We wspólnym przedsięwzięciu Agencja zobowiązuje się do:

- nieodpłatnego udostępnienia pomieszczenia na siedzibę filii.

### § 6.

We wspólnym przedsięwzięciu Centrum zobowiązuje się do:

- nieodpłatnego udostępnienia sal dydaktycznych na organizowane kursy i szkolenia,

§ 7.

- We wspólnym przedsięwzięciu Instytut zobowiązuje się do:
- wyposażenia biura filii,
  - zapewnienia jednego etatu dla kierownika filii,
  - zapewnienia określonych środków finansowych na działalność szkoleniową i konsultingową.

§ 8.

Dla koordynowania działalności merytorycznej Instytut powoła, w terminie dwóch miesięcy od dnia podpisania niniejszej umowy, Radę Programową złożoną z przedstawicieli Instytutu, Agencji, Centrum i Urzędu, która analizować będzie realizację zadań szkoleniowych przez Filię i uzgadniać kierunki tych zadań.

§ 9.

Umowa została zawarta na czas nieokreślony i wiąże strony od dnia 1 lipca 1993 r..

§ 10.

W sprawach nie uregulowanych umową mają zastosowanie przepisy Kodeksu Cywilnego.

§ 11.

Umowę sporządzono w 8 egzemplarzach, po 2 dla każdej strony.

Podpisy zawierających umowę:

- za Urząd ..... *Rizich* .....
- za Agencję ..... *[Signature]* .....
- za Centrum ..... *[Signature]* .....
- za Instytut ..... *[Signature]* .....



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

**November 22, 1993**

**Mr Zdzisław Krajewski, Director  
Polish-American Entrepreneurship  
Institute, Poznań  
60-967 Poznań, Poland**

**Dear Zdzisław,**

**Please respond to the attached letter by Wednesday, August 4, by fax (001-614-292-1260).**

**I was surprised that you had not come to the U.S.A. We would have had better opportunity to solve many problems if you had been in Columbus. Could you give me the reasons which made you change your mind.**

**Even though I hope that we can solve the problems for our mutual benefit. The only way to do this is to be open and honest about the perceptions of both coordinators and other staff. Please respond separately because you may have different ideas about this. The language of your response may be Polish--**

- 1. Who is responsible between the two coordinators for each of the following parts of the work plan for the Institute? If responsible for subparts please specify these parts.**
  - a. Managing courses:**
  - b. Developing curriculum:**
  - c. Writing cases**
  - d. Working with faculty team:**
  - e. Writing reports**
  - f. Managing the budget**
  - g. Developing satellite sites**
  - h. Finding external sources of income**
- 2. Please describe approximately how much time you devote to what tasks of the Institute each week? Please specify the types of activities they involve (i.e., how many phone calls, guests, external visits, reports, etc.)**
- 3. To what extent does the faculty participate in each of the activities described in**

**question #1?**

- 4. What are the responsibilities of the staff assistant related to each of the activities described in question #1?**
- 5. How are decisions about the Institute made? And how are they communicated? (Please describe the process.)**
- 6. What are your specific duties/engagements during the year (paid or unpaid) outside of the work of the Institute? Please name each activity and how much time it takes.**
- 7. What do you perceive the strong points of your Institute are at this time?**
- 8. What do you perceive the weak points of your Institute are now?**
- 9. How is the Institute perceived by others? How do you know this?**
- 10. What problems do you have in working with your partner coordinator? Please tell us both professional and personal problems.**
- 11. How are you perceived by the other coordinator?**
- 12. How do you feel about the working relationship with the Economic Foundation in Gdansk?**
- 13. How do you feel about the working relationship with the staff at CETE/OSU?**
- 14. How do you feel about the working relationship with the Institutes in Bialystok/Rzeszow?**
- 15. What would you like the future of the Institute to be? What role do you see for yourself?**
- 16. On the basis of your analysis of the problems identified by you in this questionnaire, please identify the critical weaknesses, the source of these problems, and suggest solutions. (Imagine you are an outside consultant for your own company.)**

**Sincerely,**

**Catherine Ashmore, Director**

Sierpień 2, 1993

Zdzisław Krajewski  
Polsko-Amerykański Instytut  
Przedsiębiorczości  
ul. Powstańców Wlkp. 16 p. 1521  
60-967 Poznań

Drogi Zdzisławie,

Bardzo Cię proszę o przesłanie do mnie fax-u z odpowiedziami na pytania dołączone do niniejszego listu, najpóźniej do środy - 4 sierpnia.

Dziwi mnie, że nie przyjechałeś do USA, tak jak planowaliśmy. Mielibyśmy okazję rozwiązać wiele problemów gdybyś był z nami w Columbus. Czy mógłbyś podać powód zmiany Twojej decyzji?

Zanim spotkasz się z Fundacją w Gdańsku, dobrze będzie jeżeli będziemy dysponowali większą ilością informacji na temat Twojego Instytutu i znali opinie jej kierowników. Mam nadzieję, że konstruktywne podejście do rozwiązania tego problemu będzie dla nas wszystkich korzystne - potraktujmy to jako proces naszego doskonalenia się.

Oczekujemy tłumaczenia polskich materiałów dydaktycznych z marketingu i planowania strategicznego, co obiecał Walery Elżbiecie podczas pobytu w Columbus, w czerwcu.

Załączam moje wyrazy szacunku,

M. Catherine Ashmore

Director, International Enterprise Academy

Drogi Zdzisławie,

Z przykrością dowiadujemy się, że Polsko-Amerykański Instytut Przedsiębiorczości w Poznaniu nadal boryka się z kłopotami w kierowaniu tą instytucją. Wierzę, że możemy wspólnie rozwiązać te problemy z korzyścią dla nas wszystkich. Jedyną drogą jest otwarta i uczciwa wymiana własnych opinii, zarówno koordynatorów jak i innych zaangażowanych osób. Proszę o samodzielne odpowiedzi i zaprezentowanie własnego punktu widzenia. Oczekuję odpowiedzi w języku polskim najpóźniej do środy, tj 4 sierpnia.

1. Kto z koordynatorów odpowiada za niżej wyszczególnione zadania Instytutu? Jeżeli każdy z koordynatorów odpowiada za poszczególne części tych zadań, wymień i opisz te części.
  - a/ organizowanie szkoleń,
  - b/ opracowywanie programów szkoleń,
  - c/ opracowywanie "cases",
  - d/ współpraca z wykładowcami,
  - e/ sporządzanie raportów,
  - f/ gospodarowanie budżetem,
  - g/ tworzenie punktów filialnych,
  - h/ pozyskiwanie uzupełniających źródeł finansowania,
  - i/ promowanie Instytutu.
2. Proszę określić w przybliżeniu ile czasu w tygodniu przeznaczasz na poszczególne zadania? Wymień jakie czynności wykonujesz dla ich zrealizowania? (np. ile rozmów telefonicznych, ilu gości, ile dodatkowych wizyt, raportów etc..)
3. W jakim stopniu wykładowcy uczestniczą w realizacji zadań wymienionych w pytaniu 1?
4. Jaki jest zakres obowiązków asystentki w stosunku do zadań wymienionych w pytaniu 1?
5. W jaki sposób podejmowane są w Instytucie decyzje? W jaki sposób są one przekazywane do realizacji? (proszę opisz ten proces)
6. Jak jest Twoje dodatkowe zaangażowanie w prace poza Instytutem (płatne lub niepłatne)? Wyszczególnij je wszystkie z podaniem ile czasu każda z nich zajmuje
7. Jakie są Twoim zdaniem atuty (silne strony) Instytutu w chwili obecnej?

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8. Jakie są Twoim zdaniem słabości Instytutu?
9. W jaki sposób Instytut postrzegany jest w środowisku przez osoby trzecie? Co pozwala Ci tak sądzić?
10. Na jakie problemy natrafiasz we współpracy z Twoim partnerem - koordynatorem? Proszę przedstawić zarówno problemy zawodowe, jak i osobiste.
11. Jak jesteś postrzegany przez swojego partnera - współkoordynatora? Co pozwala Ci tak sądzić?
12. Jak układają się Twoje stosunki współpracy z Fundacją Gospodarczą NSZZ Solidarność w Gdańsku?
13. Jak układają się Twoje stosunki współpracy z Center on Education and Training for Employment/The Ohio State University?
14. Jak układają się Twoje stosunki współpracy z Instytutami w Białymstoku i Rzeszowie?
15. Jak widzisz działalność Instytutu w przyszłości? Jaką rolę chciałbyś Ty pełnić?
16. W oparciu o analizę problemów podniesionych w powyższych pytaniach spróbuj ustalić podstawowe niedociągnięcia w pracy Instytutu, źródła istniejących problemów oraz zaproponuj rozwiązania (postaw się w roli niezależnego konsultanta we własnym Instytucie).

Pozdrowienia,

Cathy Ashmore

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**Dear Cathy,**

**First of all I would like to apologize for not answering your fax immediately because I was on vacation. Sorry for writing in Polish.**

**Cathy, I didn't come to the U.S.A for personal and professional reasons but I would rather discuss them with you during your next visit in Poland.**

**I read your Fax with great surprise. I suppose that your statement about Poznan Institute difficulties with management was based on information received from W. Lach and our Assistant. I think that to get the whole picture of Poznań Institute activities you might get to know opinions from the other side - the faculty of Economics Academy working with Poznań Institute, members of Regional Advisory Committee, my own one, and also from persons working with the institute on a irregular basis, for instance: the Dean of Economics Academy in Poznań, the Director of Voievodship Labor Office, the Director of the Local Office of the Ministry of Privatization etc. I don't know what arguments W. Lach has against me. Nevertheless, I'm sure that his objections relate to personal matters not to the merits.**

**Now I will try to answer your questions:**

**1.**

- a/ We, both are responsible for organizing trainings.**
- b/ Walery is in charge of preparing marketing module. I'm responsible for strategic planning module. We both are in charge of the remaining program modules - entrepreneurship, management, finance, import-export.**
- c/ Walery is in charge of writing "cases".**
- d/ In terms of working with faculty team I'm in charge of cooperation with faculty specialized in strategic planning, finance, law. W. Lach made contacts with teachers from marketing, management, import-export.**
- e/ I'm the only one responsible for writing reports.**
- f/ Each financial decision is made together. It results from the fact that each check must be signed by both of us.**
- g/ I am the only one who is responsible for developing satellite sites.**
- h/ We, both are looking for external sources of income to the best of our ability.**
- i/ We did not decide who was personally responsible for promoting our Institute. We thought that it was ours as well our assistant's duty.**

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2. It is difficult for me to answer your second question because I haven't kept records about the numbers of business phone calls, visitors etc. There are days in weeks that I'm overloaded in terms of making phone calls, meeting clients. And of course, sometimes I meet only one client a day or make a few phone calls.
3. The faculty are not much involved in the activities described in the point # in preparing and developing training programs. I'm aware that it was a mistake made by me as a Director of the Institute.
4. - typing and translating materials and reports,
  - promoting Institute,
  - informing about trainings, courses,
  - collecting fees for trainings and courses.
5. Decisions related to for example organizing seminars are taken by both of us. During our first meeting we decide on the amount of fee for a course, location of the course, the scope of materials for participants etc. Than our assistant passes the information to the mass media. We furnish our faculty with information about their schedule of new courses etc.
6. Outside of the work of the Institute I work for Economics Academy in Poznań. I have 4-6 hours of classes with students each week. I am not involved in any other activities.
7. a/ strong position in our region,
  - b/ the name of our Institute - it turns out that the name draws many customers' attention,
  - c/ good relations and cooperation with the authorities of the Economics Academy in Poznań,
  - d/ location and equipment of the Institute
  - e/ the scope of proposed trainings and courses,
  - f/ financial support from U.S. AID
8. a/ Lack of explicitly described the status of coordinators of the Institute. In the agreement it is necessary to state if the Institute is conducted by the Director or other body, for instance: Board of Institute Coordinators. It cannot be said that the Institute is conducted by both the Director and his vice-Director. It means that the Institute is run by two persons with the same capacity what is contradictory to the basic rules of organizing and managing institutes.
  - b/ The Institute is not a legal entity.
9. It seems to me that the position of the Institute in our region is good. My opinion is proved by the number of signed cooperation agreements with us. Also, Presidents of some towns want us to establish a satellite site of the Institute in their towns.

10. In my opinion my cooperation with W. Lach was good till April 1993. Of course by that time there were some slight misunderstandings between us, for instance, W. Lach, specially in 1992, was often absent from the Institute which he explained that he had to have more classes with students; he didn't inform me about his 3-4 day private trips, etc.

However, we came to an understanding at that time. Unfortunately, since May 1993 I have found W. Lach activities disadvantageous to the Institute. Among other things - Institute signed an agreement with a construction company to prepare an organizational-legal concept of which estimated cost was 400 mln zlotys (about \$25,000.00).

It was agreed that the Institute would get 40% of the amount. W. Lach disagreed with this and that the Institute would earn too much. But, I would like to mention that the project was done by W. Lach and his colleagues who weren't employees of the Institute,

On another occasion we signed a contract with a computer company which would organize a computer training. It was agreed that the Institute would retain 40% of the profit. Sometime later, the Director of the computer company told me that he spoke to W. Lach and that the Institute would get only 30%. I did not agree with that arrangement and we negotiated 50/50 division of profits between the Institute and the computer company.

The rest goes without saying.

11. Considering "the kind of language" used by my partner describing my person I would rather not write about this. My personal manners do not allow me to do this. There are some witnesses who might testify it.

12 and 13

Everything what I have gained so far, I am indebted to Economic Foundation NSZZ Solidarność in Gdańsk and you Cathy. Thank you very much.

14. I evaluate cooperation relations with the Institute in Białystok as very good. While the Institute in Rzeszów shows a distance to my person - I do not know the reasons of the situation.

15. I think that the main strategy of the Institute activities has already been worked out. Now, it is time to promote the Institute to establish its stronger position in our region and to try to fulfil the growing needs. It is a valuable idea to establish satellite sites of the Institute what will extend the market for our training services. My philosophy of the Institute I will present in a new version of a business plan.

What role do I see for myself? Working for the Institute I have reached better financial and professional position. I don't know what role I will play - it will be decided - but I know that I would do my best not to lose what we have already done. The Institute is more important than private decisions.

I, for my part, have to state that I wasn't enough expansive and resolute in running the Institute. If I have the opportunity to conduct the Institute I will do my best to eliminate my weaknesses.

Sincerely

Zdzisław Krajewski



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

November 22, 1993

Mr Walery Lach  
Polish-American Entrepreneurship  
Institute, Poznań  
60-967 Poznań, Poland

Dear Walery:

Please respond to the attached letter by Wednesday, August 4, by fax (001-614-292-1260).

Your planned trip to the United States taking 8 weeks in August - October should have been communicated to me when you were here in June. It is a major disregard of your commitment to the project and causes new problems that we might have resolved earlier. Can you please explain this?

We are unable to respond to your letter to me without knowing how you and Zdzislaw perceive the responses to our questions. This is essential to bring us all together and encourage teamwork.

We need to have the translated versions of Marketing and Strategic Planning that you promised to send Elzbieta when you were here in June. Also, what happened to the translation of the video tapes?

We hope this approach to solving this problem will benefit all of us. Lets try to look at it as a learning process.

1. Who is responsible between the two coordinators for each of the following parts of the work plan for the Institute? If responsible for subparts please specify these parts.
  - a. Managing courses:
  - b. Developing curriculum:
  - c. Writing cases
  - d. Working with faculty team:
  - e. Writing reports
  - f. Managing the budget
  - g. Developing satellite sites
  - h. Finding external sources of income

2. Please describe approximately how much time you devote to what tasks of the Institute each week? Please specify the types of activities they involve (i.e., how many phone calls, guests, external visits, reports, etc.)
3. To what extent does the faculty participate in each of the activities described in question #1?
4. What are the responsibilities of the staff assistant related to each of the activities described in question #1?
5. How are decisions about the Institute made? And how are they communicated? (Please describe the process.)
6. What are your specific duties/engagements during the year (paid or unpaid) outside of the work of the Institute? Please name each activity and how much time it takes.
7. What do you perceive the strong points of your Institute are at this time?
8. What do you perceive the weak points of your Institute are now?
9. How is the Institute perceived by others? How do you know this?
10. What problems do you have in working with your partner coordinator? Please tell us both professional and personal problems.
11. How are you perceived by the other coordinator?
12. How do you feel about the working relationship with the Economic Foundation in Gdansk?
13. How do you feel about the working relationship with the staff at CETE/OSU?
14. How do you feel about the working relationship with the Institutes in Bialystok/Rzeszow?
15. What would you like the future of the Institute to be? What role do you see for yourself?
16. On the basis of your analysis of the problems identified by you in this questionnaire, please identify the critical weaknesses, the source of these problems, and suggest solutions. (Imagine you are an outside consultant for your own company.)

Sincerely,

Catherine Ashmore, Director

Dear Cathy,

Thank you very much for your quick response to my letter. I am very sorry that Poznań makes you troubles so often, but things came to the point that we do not know how to deal with the situation ourselves.

I agree with you as to my visit in Philadelphia. I should have used the opportunity of being in Columbus and discussed this with you. To tell the truth, I'm not finding any reason for not having done this. However, I think that my trip will not "cause any problems to our project". For me this trip will be a wonderful opportunity to develop my professional knowledge and skills in the field of marketing, which I will use in my work for the Institute. Before leaving, I have done my best to find customers who would be interested in market research conducted by our Institute and I have already started promoting our new courses (see attached advertisement).

Here are my answers to your questions:

1. While I signed an agreement with the Institute I had to agree to the below listed scope of duties described by Zdzisław (see attached). A scope of the director's duties is described in such a formalized way.
  - a/ in terms of managing training, I am concentrated more on the initial stage of their organizing, i.e. I prepare advertisements; together with Zdzisław I prepare curriculum and cost calculations. Besides, the basic courses I organize others, for instance: for salespeople and computer courses.
  - b/ Instructors receive curriculum of the courses and they decide on the details based on our materials themselves. I prepare, in details, courses for salespersons and module of the main marketing course.
  - c/ In the second year of our project I prepare and wrote the cases.
  - d/ Cooperation with our faculty is not systematic; Mostly, our cooperation is focused on a particular module of the course and educational materials.
  - e/ Writing reports is a duty of the Director and the Assistant,
  - f/ I do not have any influence on taking financial decisions.
  - g/ Zdzisław did not consult with me establishing satellite sites in Koło and Konin (He, himself signed an agreement with Local Government), nor inform me about after that fact.
  - h/ My external financial incomes came from organizing courses for salespersons and computer's courses, and also from conducting marketing researches. Now, I'm negotiating with a German company to conduct marketing research in the banking market and trainings for bankers.
  - i/ In terms of promoting our Institute, I'm in charge of promoting all courses and shooting advertising film for a local T.V.
2. It is very difficult to estimate how many phone calls I made or how many meetings with clients I had at our Institute. Lets put in this way. within last two days, I participated in a meeting with representatives of a German company in Jelenia Góra (Saturday, July, 30). I was there with one of our instructors. I made some phone calls related to that matter. I contacted some representatives of Labor Office to discuss courses for leaders of public works. On Monday, August 9, I am going to Gniezno to talk about establishing new satellite site there.
3. The faculty are involved only in running courses, except courses for salespersons. In this case, the faculty are also in charge of promoting and selling the courses.

4. According to the attached scope of activities of the staff assistant, the duties do not absorb much of her energy and skills. In fact, the staff assistant helps with writing reports, specially after our last visit in Columbus and having received new instructions on writing reports for dr Koltai. In terms of finding external sources of income, Ewa organized an English course which was to be continued in September. Such a course is also some kind of promoting our Institute because it is addressed to small business owners.
5. Decision-taking process is not homogeneous. Recently, I have been informed very seldom about decisions made by Zdzisław. I learned from others that "Lach does not have anything to say here".
6. Outside of the work of the Institute, I work for Academy of Economy where I have classes with students - 270 hours/a year. Sometimes I am asked to work for different companies. I usually do this kind of work after my business hours at home. I think, it takes me approximately about 10-15% of my time.
7. highly qualified faculty team
  - slow substitution of teachers (new young teachers who replace old, more experienced teachers have less requirements in terms of remunerations, and they seem to be more willing to develop strong relation)
  - unique set of materials for the faculty and participants
  - location
  - equipment
  - course promotion
  - close cooperation with Voievodship Labor of Office.
8.
  - flow of information in our Institute
  - financial instability
  - ad hoc management
  - monopolized system of decision-making which lessens my motivation to promote the Institute
  - lack of motivational system and integration of the faculty with the Institute
  - lack of legal entity of the Institute.
9. Because the integration among teachers does not exist, most of them treat the work for Institute as a source of additional income. Based on our results of market research I may say that most of our customers and participants are satisfied with our Institute services. Coordinators do not exchange information among themselves.
10.
  - I am not informed about new decisions (a contract with Konin, Koło);
  - undermining my authority ("Lach does not have anything to say here")
  - openly showing distrust and suspicion towards my person; when I asked Zdzisław to show me our financial documents he refused. I said I had also the right to review our documents but Zdzisław responded that he would be inspecting m because "I might have taken away something". Zdzisław is a very closed as a person, not communicative, a type of introvert. We are two opposite persons sitting at opposite extremes what is the main cause of the conflict.
11. Zdzisław perceives me as his potential competitor who wants to take over his position. One day he said that if he lays me off nobody would protect me. At present, based on Zdzisław's recent decisions I'm positive that cooperation between us is not possible. A letter which I sent to you expressed my

feelings. Zdzisław said in public (in Gdynia) that I spent 50% of my business hours in the Institute doing my private work, what was, of course, pure rubbish. I do not know what made him think like that. Besides, Zdzisław has never told me what is wrong in my work.

12. Working relations with the Economic Foundation in Gdańsk are not concrete. In my opinion Foundation rather inspects the work of Institutes than supports them. The Foundation doesn't see itself as to be responsible for them. For instance, till today Institutes have not received a settlement of accounts related to FORUM in Gdynia which was sponsored in the major part by Institutes (as opposed to the Foundation).
13. During the second year of our project we did not use the capacity of CETE. After our trip to Columbus this year we asked Elżbieta for materials and we got them immediately. During this year we will develop better cooperation especially thanks to working with consultants from the OSU.
14. We share our thoughts with our colleagues from Białystok and Rzeszów. We sent them videos which we received from Cathy (Clio Awards) and also we translated and sent videos on marketing to them. Coordinators from Rzeszów invited us to their conference in Polańczyk. There is a lack of cooperation on daily-base, concrete and regular with Institute in Białystok and Rzeszów.
15. In future I see the Institute as a private company developing the same activities as Institute does now, and using facilities of Academy and cooperation with CETE. I would like to play the role of its manager. According to Alicja Zajaczkowska, after Bogdan Sojkin resignation, Gdańsk expected me to offer myself as a candidate for the position. I didn't feel the Foundation's support. Furthermore, nobody discussed with me about taking over Bogdan post by other person but it was me who was to work with the new coordinator.  
Institute as a private company would focus on trainings only.
16. I presume that I have described the critical weaknesses of our Institute in the previous answers. I would like to suggest the following solutions:
  - to build strong relations with young faculty through a proper motivational system and letting them carry out some specific duties,
  - to extend our training offer by new forms "in-company training", new topics (e.g accounting of small businesses, computer application in running small businesses, how to prepare market research project and what methods need to be used),
  - to develop public relations based on a strategy developed by Rzeszów,
  - to promote courses in new locations - satellite sites,
  - thanks to good working relations with a consulting company the Institute may be concentrated on developing trainings and leave consulting for the specialized company.

I hope, my answers will give you the whole picture of the situation in Poznań. I understand that you will not be able to respond to my previous letter before reading Zdzisław's letter. Zdzisław is returning from vacation on Monday (August 10). I will let you know about my address in Philadelphia as soon as I get it.

Regards,

Walery

***A SCOPE OF ACTIVITIES OF VICE DIRECTOR OF THE INSTITUTE***

1. Preparing an activity plan for Polish-American Entrepreneurship Institute.
2. Writing detail curriculums of trainings and seminars.
3. Promoting and advertising activities in local region
4. Establishing cooperation with local Institute.
5. Participating in activities of local advisory committee
6. Coordinating all activities related to preparation of educational materials in the need of trainings and seminars
7. Cooperating with the faculty.

***A SCOPE OF ACTIVITIES OF THE SECRETARY - ASSISTANT***

Running the Secretary's Office as an independent employee with the following responsibilities:

- a) writing correspondence and reports instructed by the Director of the Institute and translating materials if necessary,
- b) carrying out correspondence in terms of administration and supply matters
- c) keeping correspondence register, taking care of mail
- d) keeping records of the Institute properties: supplies, stationery, equipment...
- e) providing the Institute with Official Journals and magazines indicated by the Director
- f) serving the Director and his visitors, making drinks etc.,
- g) maintaining tidiness of the Secretary's Office and Director's Cabinet

Rzeszow



POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI  
POLISH-AMERICAN SMALL BUSINESS INSTITUTE

35-030 Rzeszów, ul. Zygmuntowska 2a, tel./fax; (0 17) 328-58  
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

Rzeszów,

FUNDACJA GOSPODARCZA  
NSZZ "SOLIDARNOŚĆ"  
GDAŃSK  
A. Unterschuetz

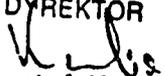
Activity undertook by coordinators of "Small Business Institute"

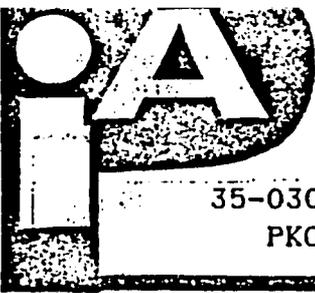
in Rzeszów

July - August - September, 1993.

1. Managing of Small Business Institute current activity.
2. Participating in meetings with teachers hired by Institute.
3. Training new teachers hired by Institute in August and September - 2 meetings weekly.
4. Participating in training in Ohio State University.
5. Preparing the materials from USA on export-import, managing, selling, team building.
6. Establishing contacts and signing the agreement of cooperation in organizing courses for Foundation in Support of Local Democracy.
7. Establishing cooperation with Association of Local Activity on organizing courses.
8. Establishing cooperation and consulting for RESBUD in Rzeszów.
9. Consulting settlement for BONEX in Lańcut - preparing business plan for above firm.
10. Representing the Institute on meetings: with Prime-Minister - Hanna Suchocka in Przecław near Mielec and with Minister of Contacts with EWG - Jan Krzysztof Bielecki.

11. Participating in meetings with entrepreneurs in August (1 meeting) and in September (2 meetings).
12. Organizing courses on finance, marketing, computers in our region - in Kolbuszova, Lancut, Strzyzów, Lezajsk and Rzeszów.
13. Participating in Task Force meeting in America-Polish Center on Labour in Warsaw on September 28, 1993.
14. Participating in meeting with Advising Committee in Warsaw on September 29, 1993.
15. Setting up new branches in Tarnobrzeg, Przemysl and Sanok.
16. Representing the Institute on Conference "Regional Development in Poland" on September 30 - October 1, 1993 in Warsaw.
17. Participating in proceedings of International Center on Building Promotion "InterRES" in Rzeszów on September 14-16, 1993.
18. Representing the Institute and consulting for created in September, 1993 Regional Business Exchange. Elections to the Director of Institute for Quotation Exchange Committee.

DYREKTOR  
  
Krzysztof Kaszuba



POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI  
POLISH-AMERICAN SMALL BUSINESS INSTITUTE

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Rzeszów,

FUNDACJA GOSPODARCZA  
NSZZ "SOLIDARNOŚĆ"  
GDAŃSK  
A.Unterschuetz

SPRAWOZDANIE Z DZIAŁALNOŚCI KOORDYNATORÓW POLSKO-AMERYKAŃSKIEGO  
INSTYTUTU PRZEDSIĘBIORCZOŚCI W RZESZOWIE  
ZA OKRES LIPIEC - SIERPIEŃ - WRZESIEŃ 1993r.

1. Organizacja i kierowanie pracą bieżącą Instytutu.
2. Organizacja spotkań z nauczycielami.
3. Trening nowych nauczycieli zatrudnionych przez Instytut w m-cu Sierpniu i Wrzesniu - 2 spotkania tygodniowo.
4. Udział w szkoleniu w Ohio State University.
5. Praca nad materiałami przywiezionymi z USA w zakresie eksportu-importu, zarządzania, sprzedaży, budowy zespołu.
6. Nawiązanie kontaktów i podpisanie umowy o współpracy w zakresie organizacji szkoleń dla Fundacji Rozwoju Demokracji Lokalnej.
7. Nawiązanie współpracy z Leżajskim Stowarzyszeniem Inicjatyw Lokalnych w zakresie organizacji szkoleń.
8. Nawiązanie współpracy i doradztwo na rzecz firmy RESBUD w Rzeszowie.
9. Przeprowadzenie doradztwa dla firmy BONEX w Lancucie, opracowanie biznes planu dla firmy.
10. Reprezentacja Instytutu na spotkaniach z Premierem RP Hanna Suchocka w Przecławiu k. Mielca, Ministrem d/s kontaktów z EWG - Janem Krzysztofem Bieleckim.

11. Udział w spotkaniach z przedsiębiorcami w m-cu Sierpniu (1 spotkanie) i Wrzesniu (2 spotkania).
12. Przygotowanie i organizacja kursów w zakresie finansów, marketingu i szkolenia komputerowego w regionie - w Kolbuszowej, Lancucie, Strzyżowie, Leżajsku i Rzeszowie.
13. Udział w spotkaniu koordynatorów w Amerykansko-Polskim Centrum Pracy w Warszawie - 28.09.1993r.
14. Udział w spotkaniu Komitetu Doradczego w Warszawie w dniu 29.09.1993r.
15. Praca nad organizacją filii w Tarnobrzegu, Przemyślu i Sanoku.
16. Reprezentacja Instytutu na Konferencji nt. "Rozwoju Regionalnego w Polsce" w dniach 30 września - 1 października w Warszawie.
17. Udział w pracach Międzynarodowego Centrum Promocji Budownictwa "InterRes" w Rzeszowie w dniach 14-16 września 1993r.
18. Reprezentacja Instytutu i doradztwo dla powstałej we wrześniu 1993r. Regionalnej Giełdy Budowlanej. Wybór dyrektora Instytutu do Komisji Notowań Giełdowych.

DYREKTOR  
  
Krzysztof Kaszuba

1993

Quarterly Report JULY, AUGUST, SEPTEMBER

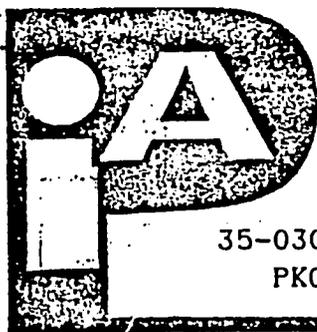
Location: Rzeszów

Dates: 7 OCTOBER 1993

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship						
Marketing		SEPTEMBER	6	10	60	
Management						
Finance		AUGUST SEPTEMBER	8	60	480	
Strategic Planning- COMPUTERS		SEPTEMBER	40	10	400	
Export/Import						
Faculty Training		JULY- SEPTEMBER	20	4	80	
Bankers/Government						300
Media		JULY- SEPTEMBER	5	4	20	
Business Start-up						
Students (Traditional)						
Business Managers COMPUTERS			30	10	300	200
Other (Describe on back)						
Other (Describe on back)						
c						

Z-ca DYREKTORA  
Gorał  
Adami Gorał

DYREKTOR  
Krzysztof Kaszub  
150



POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI  
POLISH-AMERICAN SMALL BUSINESS INSTITUTE

35-030 Rzeszów, ul. Zygmuntowska 2a, tel./fax; (0 17) 328-58  
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

QUANTITATIVE DATA - RZESZÓW  
JULY, AUGUST, SEPTEMBER - 1993

EXPLANATORY NOTES

1. Course for entrepreneurs (computers)	-	300 h
2. Course for Government Officials:		
Finance	-	480 h
Marketing	-	60 h
Computers	-	400 h
3. Consultation for Government Officials	-	400 h
Consultation for Bankers	-	200 h
4. Training faculty	-	80 h
5. Journalists + media (TV, Radio)	-	20 h
	-----	
Total:		1 840 h

DYREKTOR

*Krzysztof Kaszuba*  
Krzysztof Kaszuba

4

Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe

Institution: PRZESZOW  
SMALL BUSINESS INSTITUTE

Quarter: JULY  
AUGUST 1993  
SEPTEMBER  
Ist

Contact Person Regarding this Report KRZYSZTOF KASZUBA

Project Component \_\_\_\_\_

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER: 1840

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	MARKETING	COMMERCE		FINANCE		
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input type="text"/>	<input type="text"/>	<input type="text" value="80"/>	<input type="text"/>	<input type="text"/>	<u>PRZESZOW</u>
- Students (Traditional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Government Officials	<input type="text" value="60"/>	<input type="text" value="400"/>	<input type="text" value="100"/>	<input type="text" value="480"/>	<input type="text"/>	<u>MIELEC, LEZANSKI</u> <u>KOLBUSZOWA, KARCZY</u>
Business Community/ Business Managers	<input type="text"/>	<input type="text" value="300"/>	<input type="text" value="200"/>	<input type="text"/>	<input type="text"/>	<u>PRZESZOW</u>
Journalists - Media	<input type="text"/>	<input type="text"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>	
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other Groups/Individuals <u>BANKERS</u>	<input type="text"/>	<input type="text"/>	<input type="text" value="200"/>	<input type="text"/>	<input type="text"/>	<u>PRZESZOW REGION</u>
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

COMMENTS: BECAUSE THE HOLIDAYS WE DIDN'T ORGANIZE THE BASIC COURSE FOR ENTREPRENEURS

Krzysztof Kaszuba Z-ca DYREKTORA  
Adam Gorai

Daily magazine *NOWINY*  
No 168 (13537) August 30, 1993

## Special Free Economic Zone in Mielec

### The Government has raised a barrier

Last Saturday, on the 28 of August, the Prime Minister, Ms Hanna Suchocka met with representatives of Rzeszów voievodship, local municipal government and local businessmen to discuss the establishment of the Mielec Free Economic Zone. The meeting took place at the Reyów castle in Przelew near Mielec. It was an event of great importance for future development of Mielec and its region.

The major goal of establishing the Free Economic Zone here is to build better conditions for jobs creation and economic growth - said the Prime Minister - Poland is too big to be led by the Government from Warsaw because the Government is not able to find the best solutions for the variety of problems appeared in each region of our country. I think that we need to encourage local authority to take the initiative in terms of determining economic development strategies. Our Government wants to avoid mistakes made in the past, when the official requirement of being the member of the political party limited personal involvement and interest in decision making process and also the local organizations did not perceive themselves to be responsible for their members.

The idea of establishing a free economic zone came out during workers' manifestations organized by the Transportation Equipment Factory Polish Aviation Works (WSK - PZL Mielec), last August. On the 20 of November, 1992 the Minister of Trade and Industry, Waclaw Niewiarowski signed an agreement with the local authority concerning a Free Economic Zone in Mielec region. Within that agreement the Polish Government was to prepare a strategy how to implement the rules of the Free Economic Zone in the reality. At the same time a tender was announced to get the best program which might be carried out. Finally, the best program which was chosen was done by experienced Irishmen from Shannon.

On the 5th of August, the Minister Niewiarowski promised to present a package of new regulations for Mielec region ready by the end of that month. That special package offered would include: 1/ a 10 year tax holiday, with progressive divrsification in the second half 2/a 10-year exemption from real estate taxes for investors who modernize the old facilities or build new ones 3/accepting investment outlays as the cost of achieving income and accelerated amortization 4/investor could hold foreign currency account 5/foreigners investing in the zone would be free to buy and sell land and facilities would be free to buy and sell land and facilities without having to receive a permit from the Ministry of Internal Affairs 6/value -added tax (VAT) would be paid only on goods sold and ship to another zone or on the foreign market; and other privileges related to the Free Economic Zone.

Mielec region which seemed to have a good economic potential (the Center of Poland's aviation industry) has been hard-hit by recession. According to the official statistics Mielec' unemployment rate was 18%. The President of Mielec city was convinced that the number had been lowered. The real number was 28%. The Special Economic Zone in Mielec if it worked would reduce the side effects of mass unemployment and asset decapitalization. However, we might also face some zone's risks.

Mr Adam Gąsior, the President of Mielec Economic Council had some doubts about the proposed changes in the legislation in Poland in terms the Free Economic Zone. At the very beginning, it was said that the Free Economic Zone would be guaranteed by an official act issued by Polish Sejm, but in reality it was proved only by the Polish Government. What would be the situation if the Government was changed? Industrial restructuring, foreign investments required stable regulations. In the past, the Polish Government implemented some changes to improve the national budget situation what made a chaos in the economy of each region. For example, a new 6% boundary tax made a lot of financial problems for those entrepreneurs who were in the process of carrying out signed contracts. The director of Polish-American Small Business Institutes in Rzeszów, Krzysztof Kaszuba also expressed his doubts about the whole new situation in the region. He raised a question why during the last 4 years of democratic government existence non-privilege was introduced in order to support the development of small businesses. Besides, the unemployment issue needed the new Government's consideration.

Ms Hanna Suchocka's issues were strongly supported by Mr Tadeusz Stryjczyk and the President of Radom City, Mr Janusz Szklanka who established Radom Agency for Economic Development. There were about 30 organizations of that kind in Poland which created a new Association for Economic Development Agencies. Mr Janusz Szklanka who was elected the President of Radom City on the 2 June, 1993 presented his mission focused on empowering municipal government.

Does Mielec region have a chance to become a model of local economic development for other regions in Poland?

## Specjalna strefa ekonomiczna w Mielcu

# Rząd podniósł szlaban

(Inf. wł.)

W minioną sobotę, tj. 28 sierpnia w pałacu Reyów w Przecławiu k. Mielca z przedstawicielami władz województwa rzeszowskiego, samorządu terytorialnego i gospodarczego oraz kilkudziesięcioma miejscowymi biznesmenami spotkała się premier RP Hanna Suchocka. Można powiedzieć, iż wizyta ta miała historyczne znaczenie dla

rejonu mieleckiego. Podstawowym problemem, jaki omawiano na spotkaniu było utworzenie specjalnej strefy ekonomicznej w Mielcu.

Oczywistym celem funkcjonowania specjalnej strefy ekonomicznej jest tworzenie nowych miejsc pracy i tworzenie warunków wzrostu gospodarczego. — powiedziała pani premier.

(CIĄG DALSZY ZE STR. 1.)

błędów przeszłości, gdy przymus organizacyjny służył ograniczaniu inicjatywy i uwalnianiu struktury organizacyjnej od dbałości o interesy zrzeszonych podmiotów.

Pomysł utworzenia specjalnej strefy ekonomicznej zrodził się w ub. r., w sierpniu, w czasie szeregu akcji protestacyjnych w WSK — PZL Mielec. 20 listopada ub. roku minister przemysłu i handlu Wacław Niewiarowski podpisał porozumienie z władzami lokalnymi, że rząd opracuje specjalny plan utworzenia takiej strefy. Jednocześnie ogłoszono przetarg na najlepszy program, który mógłby być w Mielcu konkretnie realizowany. Przetarg wygrali Irlandczycy z Shannon, którzy podobny pomysł z powodzeniem wprowadzili w życie u siebie.

5 sierpnia br. minister Niewiarowski zapowiedział, że pakiet konkretnych preferencji dla rejonu mieleckiego będzie gotowy do końca tego miesiąca (stąd też pilne spotkanie w Przecławiu). Oferuje on m. in.: zwolnienie z podatku dochodowego na 10 lat, zwolnienie z podatku od nieruchomości. Upoważnienie władz strefy do sprzedaży nieruchomości cudzoziemcom. Wprowadzenie prawa do prowadzenia rachunków walutowych. VAT będzie pobierany tylko przy wywozie towarów do innej strefy lub za granicę. Obowiązywać będą także wszystkie udogodnienia przysługujące wolnemu obszarowi celnemu.

Rejon mielecki, w którym, wydawać by się mogło, istnieje dość znaczny potencjał gospodarczy, od kilku lat znajduje się w poważnym kryzysie. Oficjalna stopa bezrobocia wynosi tu 18 procent. Jest to jednak według prezydenta Mielca Władysława Bieńka liczba poważnie zaniżona, gdyż realna stopa bezrobocia kształtuje się w granicach aż 28 procent. Utworzenie specjalnej strefy ekonomicznej w Mielcu, chociaż jest chyba jedyną drogą wyjścia z impasu, niesie ze sobą także wiele niewiadomych.

Adam Gąsior, prezes Mieleckiej Izby Gospodarczej, miał

— Polska jest zbyt dużym krajem na to, by mogła być rządzona centralistycznie. Warszawa nie będzie w stanie rozwiązywać wszystkich problemów lokalnych. Sądzę, że konieczne jest wzmocnienie roli samorządu gospodarczego. Rząd wyjdzie naprzeciw takim inicjatywom, gdyż trzeba uniknąć

(CIĄG DALSZY NA STR. 3)

wątpliwości co do warunków prawnych utworzenia strefy. Otóż, początkowo wprowadzenie tego typu innowacji w polskim krajobrazie społeczno - ekonomicznym miało być poparte ustawą sejmową. Obecnie jest to tylko i wyłącznie decyzja rządu. Co się więc stanie, gdy po wyborach nastąpi zmiana przy sterach państwa? Przyciągnięcie obcego kapitału, a także rozwój rodzimego, wymaga absolutnej stabilności przepisów. Często niewielkie zmiany, które w minimalnym stopniu reperowały budżet, przynosiły więcej zła niżeli pożytku. Jako przykład podał wprowadzenie 6-procentowego podatku granicznego. Dokonano tego w trakcie trwania wielu kontraktów handlowych. Doprowadziło to do niepotrzebnych zaburzeń finansowych. Podobne wątpliwości miał także szef Polsko - Amerykańskiego Instytutu Malej Przedsiębiorczości w Rzeszowie Krzysztof Kaszuba. Zapytał on również, dlaczego w ciągu czterech lat funkcjonowania, zdawałoby się demokratycznych rządów, do tej pory nie wprowadzono konkretnych ulg dla tych, którzy chcą się rozwijać? Bardziej drastycznie powinno się podejść również do problemu bezrobocia.

Premier Suchocka, obok Tadeusza Syrytyczyka wydatnie wspierał także wojewoda radomski Janusz Szlanka. W ub. roku uruchomił on Radomską Agencję Rozwoju Gospodarczego. Dzięki jego staraniom, około 30 podobnych organizacji w Polsce założyło po kilku wspólnych spotkaniach Stowarzyszenie Agencji Rozwoju Regionalnego. Od 2 czerwca br., Janusz Szlanka pełni funkcję wojewody i stawia głównie na rozwój samorządu gospodarczego. Wypowiedziom wojewody radomskiego i premier Suchockiej uważnie przysłuchiwał się wojewoda rzeszowski Kazimierz Ferenc i wicemarszałek senatu Józef Siłsz, którzy byli obecni na przecławskim spotkaniu.

Czy rejon mielecki stanie się wzorem gospodarczego boomu dla innych? J

MARK TOMCZYK

Gazeta Codzienna  
NOWINY

Nr 168 /13537/  
August 30, 1993

Rzeszów President

Rzeszów, 1993-8-27

GP-VI-6412-1/90/93

Mr Krzysztof Kaszuba  
Polish-American Entrepreneurship  
Institute in Rzeszów

On the behalf of The Prime Minister, Ms Hanna Suchocka we would like to invite you to attend a meeting with Ms Suchocka and representatives of local economic initiatives represented the Southeastern region of Poland.

The meeting will take place at the Przeclaw castle near Mielec, on August 28, 1993, at 4 p.m.

We look forward to seeing you.

Sincerely,

Kazimierz Ferenc  
Rzeszów President

WOJEWODA RZESZOWSKI

Rzeszów, 1993-08-27

GP-VI-6412-1/90/93

fax : 328-58

Pan  
Krzysztof Kaszuba  
Polsko - Amerykański Instytut  
Przedsiębiorczości  
w Rzeszowie

W dniu 28.08.1993r. o godz. 16<sup>00</sup> w obiekcie pałacowym w Przecławiu k/Mielca odbędzie się spotkanie Pani Premier Hanny Suchockiej z przedstawicielami samorządów, jednostek i instytucji gospodarczych regionu południowo-wschodniej Polski.

W imieniu Pani Premier zapraszam na powyższe spotkanie licząc na niezawodny Pani (Pana) udział.

Z poważaniem

*Wojewoda*  
mgr inż. arch. Kazimierz Ferenc

InterRes International Fair Co. Ltd.  
Rejtana 53A,  
35-326 Rzeszów, Poland  
Phone# (0048-17) 627-981

The President  
Entrepreneurs Association  
SBJ COUNTRY CLUB  
Zygmuntowska 2A  
35-030 Rzeszów

Dear President

I have a pleasure to invite you to our Grand Opening of the International Center for Building Trade Promotion "InterRES", which is held on September 14, 1993, at 11 a.m. It takes place during the first day of International Building trade, Furniture, Furnishings Fair "InterRES'93", at Rejtana Street 53A in Rzeszów.

The Inauguration Ceremony will be conducted by the President of Rzeszów City and the Vice Minister of Construction and Regional Planning and the Vice Minister of Foreign Trade Cooperation.

During the Fair we plan to run some special events such as: Building Trade Exhibition, a meeting with members of Building Trade Products Exchange "InterRES", the first session on stock exchange - we are to edit the first stock exchange official list.

We would be delighted to have you with us and if you would be willing to share with us your experiences as the President of Association for Entrepreneurs SBJ COUNTRY CLUB and the organizer of the next MCPB. Our major aim is to establish BUILDING TRADE BUSINESS FORUM, an international organization for industry and trade councils, economic associations and companies from neighboring regions.

The major aim of the FORUM is to define economic policy under the CentralEuropean Initiative through:

- supporting all kinds of economic activities related to the development of trade, services and technology exchange etc.;
- initiating common undertakings to standardize economic law, technical and technological norms, unify industries and groups of products;
- sharing experiences in the field of science, technology and organizational management, economic information
- matching organizational projects with investments
- developing public relations
- making contacts with financial and supporting institutions etc.

We hope you will find it interesting.

We look forward to seeing you at "InterRES".

Sincerely,

Tadeusz Zibro  
Director, "InterRES" IF

155

**Szanowny Pan**  
**Krzysztof Kaszuba**  
**Prezes**  
**Stowarzyszenia Przedsiębiorców**  
**SBJ COUNTRY CLUB**  
**ul. Zygmuntowska 2A**  
**35-030 Rzeszów**

Szanowny Panie Prezesie,

Niniejszym mam zaszczyt zaprosić Pana na inaugurację prac Międzynarodowego Centrum Promocji Budownictwa „InterRES”, która odbędzie się w dniu 14 września br. o godz. 11.00 w pierwszym dniu Międzynarodowych Targów Budownictwa, Mebli i Wyposażenia Wnętrz „InterRES '93” w hali wystawowej przy ul. Rejtana 53A w Rzeszowie.

Inauguracji dokona Wojewoda Rzeszowski wspólnie z wiceministrami gospodarki przestrzennej i budownictwa oraz współpracy gospodarczej z zagranicą.

W czasie trwania Targów rozpocznie pracę Stała Wystawa Budownictwa „InterRES”, odbędzie się zebranie założycielskie członków Giełdy Towarowej Budownictwa „InterRES”, a na pierwszej sesji giełdowej zanotujemy oferty firm — członków i uczestników giełdy — oraz wydamy pierwszą cedulę giełdową.

Równocześnie szczególnie zapraszam Pana, jako potencjalnego współorganizatora MCPB reprezentującego zrzeszone w kierowanej przez Pana organizacji firmy i podmioty gospodarcze, do udziału w konferencji inicjującej powołanie Forum Biznesu Budownictwa, organizacji międzynarodowej izb przemysłowych i handlowych, zrzeszeń i stowarzyszeń gospodarczych oraz firm o ponadregionalnym zakresie działania.

Zadaniem Forum będzie kreowanie polityki gospodarczej w ramach Inicjatywy Środkowoeuropejskiej poprzez:

- wspieranie wszelkiego rodzaju inicjatyw gospodarczych ułatwiających wymianę handlową towarami, usługami, technikami, technologiami itp. (na przykład MCPB w Rzeszowie),

- inicjowanie wspólnych przedsięwzięć standaryzujących prawo gospodarcze, normy techniczne i technologiczne, unifikujących gałęzie i grupy towarowe, porządkujących wymianę handlową (giełdy),
- wymianę doświadczeń naukowych, organizacyjnych, technicznych, technologicznych i innych,
- systematyzowanie i wzajemną wymianę informacji gospodarczych,
- kojarzenie projektów inwestycyjnych i organizacyjnych,
- działania lobbystyczne na rzecz reprezentowanych przez Forum podmiotów gospodarczych,
- kontakty z funduszami i organizacjami pomocowymi itp.

Proponuję, by finansowanie prac Forum odbywało się w ramach MCPB „InterRES” z udziałem członków-założycieli Forum w zależności od terenu, na którym będą realizowane wspólne inicjatywy Forum. Forma prawna, strona organizacyjna i rozwinięcie zakresu działania Forum pozostają do wspólnej dyskusji.

Licząc na nią, oczekuję na Pana w Rzeszowie. Równocześnie informuję, że w dniach 14, 15 i 16 września będzie Pan gościem „InterRES”.

Z poważaniem,

Tadeusz Ziobro



Prezes „InterRES” IF

Rzeszów, dnia 1 września 1993 roku.

W załączeniu: *Program*.

Daily magazine *NOWINY*  
No 168 (13537) August 30, 1993

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Mielec region which seemed to have a good economic potential (the Center of Poland's aviation industry) has been hard-hit by recession. According to the official statistics Mielec' unemployment rate was 18%. The President of Mielec city was convinced that the number had been lowered. The real number was 28%. The Special Economic Zone in Mielec if it worked would reduce the side effects of mass unemployment and asset decapitalization. However, we might also face some zone's risks.

Mr Adam Gąsior, the President of Mielec Economic Council had some doubts about the proposed changes in the legislation in Poland in terms the Free Economic Zone. At the very beginning, it was said that the Free Economic Zone would be guaranteed by an official act issued by Polish Sejm, but in reality it was proved only by the Polish Government. What would be the situation if the Government was changed? Industrial restructuring, foreign investments required stable regulations. In the past, the Polish Government implemented some changes to improve the national budget situation what made a chaos in the economy of each region. For example, a new 6% boundary tax made a lot of financial problems for those entrepreneurs who were in the process of carrying out signed contracts. The director of Polish-American Small Business Institutes in Rzeszów, Krzysztof Kaszuba also expressed his doubts about the whole new situation in the region. He raised a question why during the last 4 years of democratic government existence non-privilege was introduced in order to support the development of small businesses. Besides, the unemployment issue needed the new Government's consideration.

Ms Hanna Suchocka's issues were strongly supported by Mr Tadeusz Syryjczyk and the President of Radom City, Mr Janusz Szklanka who established Radom Agency for Economic Development. There were about 30 organizations of that kind in Poland which created a new Association for Economic Development Agencies. Mr Janusz Szklanka who was elected the President of Radom City on the 2 June, 1993 presented his mission focused on empowering municipal government.

Does Mielec region have a chance to become a model of local economic development for other regions in Poland?

11.6

## Specjalna strefa ekonomiczna w Mielcu

# Rząd podniósł szlaban

(Inf. wł.)

W minioną sobotę, tj. 28 sierpnia w pałacu Reyów w Przecławiu k. Mielca z przedstawicielami władz województwa rzeszowskiego, samorządu terytorialnego i gospodarczego oraz kilkudziesięcioma miejscowymi biznesmenami spotkała się premier RP Hanna Suchocka. Można powiedzieć, iż wizyta ta miała historyczne znaczenie dla

rejonu mieleckiego. Podstawowym problemem, jaki omawiano na spotkaniu było utworzenie specjalnej strefy ekonomicznej w Mielcu.

Oczywistym celem funkcjonowania specjalnej strefy ekonomicznej jest tworzenie nowych miejsc pracy i tworzenie warunków wzrostu gospodarczego — powiedziała pani premier.

(CIĄG DALSZY ZE STR. 1)

błędów przeszłości, gdy przymus organizacyjny służył ograniczaniu inicjatywy i uwalniał struktury organizacyjne od dbałości o interesy zrzeszonych podmiotów.

Pomysł utworzenia specjalnej strefy ekonomicznej zrodził się w ub. r., w sierpniu, w czasie szeregu akcji protestacyjnych w WSK — PZL Mielec. 20 listopada ub. roku minister przemysłu i handlu Wacław Niewiarowski podpisał porozumienie z władzami lokalnymi, że rząd opracuje specjalny plan utworzenia takiej strefy. Jednocześnie ogłoszono przetarg na najlepszy program, który mógłby być w Mielcu konkretnie realizowany. Przetarg wygrał Irlandczyk z Shannon, którzy podobny pomysł z powodzeniem wprowadzili w życie u siebie.

5 sierpnia br. minister Niewiarowski zapowiedział, że pakiet konkretnych preferencji dla rejonu mieleckiego będzie gotowy do końca tego miesiąca (stąd też pilne spotkanie w Przecławiu). Oferuje on m. in.: zwolnienie z podatku dochodowego na 10 lat, zwolnienie z podatku od nieruchomości. Upoważnienie władz strefy do sprzedaży nieruchomości cudzoziemcom. Wprowadzenie prawa do prowadzenia rachunków walutowych. VAT będzie pobierany tylko przy wywozie towarów do innej strefy lub za granicę. Obowiązujące będą także wszystkie udogodnienia przysługujące wolnemu obszarowi celnemu.

Rejon mielecki, w którym, wydawać by się mogło, istnieje dość znaczny potencjał gospodarczy, od kilku lat znajduje się w poważnym kryzysie. Oficjalna stopa bezrobocia wynosi tu 18 procent. Jest to jednak według prezydenta Mielca Władysława Bieńka liczba poważnie zaniżona, gdyż realna stopa bezrobocia kształtuje się w granicach aż 28 procent. Utworzenie specjalnej strefy ekonomicznej w Mielcu, chociaż jest chyba jedyną drogą wyjścia z impasu, niesie ze sobą także wiele niewiadomych.

Adam Gąsior, prezes Mieleckiej Izby Gospodarczej, miał

— Polska jest zbyt dużym krajem na to, by mogła być rządzona centralistycznie. Warszawa nie będzie w stanie rozwiązywać wszystkich problemów lokalnych. Sądzą, że konieczne jest wzmocnienie roli samorządu gospodarczego. Rząd wyjdzie naprzeciw takim inicjatywom, gdyż trzeba uniknąć

(CIĄG DALSZY NA STR. 2)

wątpliwości co do warunków prawnych utworzenia strefy. Otóż, początkowo wprowadzenie tego typu innowacji w polskim krajobrazie społeczno - ekonomicznym miało być poparte ustawą sejmową. Obecnie jest to tylko i wyłącznie decyzja rządu. Co się więc stanie, gdy po wyborach nastąpi zmiana przy sterach państwa? Przyciągnięcie obcego kapitału, a także rozwój rodzimego, wymaga absolutnej stabilności przepisów. Często niewielkie zmiany, które w minimalnym stopniu reperowały budżet, przynosiły więcej zła niżeli pożytku. Jako przykład podał wprowadzenie 6-procentowego podatku granicznego. Dokonano tego w trakcie trwania wielu kontraktów handlowych. Doprowadziło to do niepotrzebnych zaburzeń finansowych. Podobne wątpliwości miał także szef Polsko - Amerykańskiego Instytutu Małej Przedsiębiorczości w Rzeszowie Krzysztof Kaszuba. Zapytał on również, dlaczego w ciągu czterech lat funkcjonowania, zdawałoby się demokratycznych rządów, do tej pory nie wprowadzono konkretnych ulg dla tych, którzy chcą się rozwijać? Bardziej drastycznie powinno się podejść również do problemu bezrobocia.

Premier Suchocka, obok Tadeusza Syryjczyka wydatnie wspierał także wojewoda radomski Janusz Szlanka. W ub. roku uruchomił on Radomską Agencję Rozwoju Gospodarczego. Dzięki jego staraniom, około 30 podobnych organizacji w Polsce założyło po kilku wspólnych spotkaniach Stowarzyszenie Agencji Rozwoju Regionalnego. Od 2. czerwca br., Janusz Szlanka pełni funkcję wojewody i stawia głównie na rozwój samorządu gospodarczego. Wypowiedziom wojewody radomskiego i premier Suchockiej uważnie przysłuchiwał się wojewoda rzeszowski Kazimierz Ferenc i wicemarszałek senatu Józef Śliż, którzy byli obecni na przecławskim spotkaniu.

Czy rejon mielecki stanie się wzorem gospodarczego boomu dla innych?]

MARK TOMCZYK

Gazeta Codzienna  
NOWINY

Nr 168 /13537/  
August 30, 1993



**APPENDIX**

**5.0**

**MAINTAIN  
TASK  
FORCE**

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## **TASK FORCE AGENDA**

**September 29, 1993, Warsaw**

- 1. Welcome**
- 2. Presentation of Achievements of Year II  
(Białystok, Poznań, Rzeszów)**
- 3. Overview of Year III (Białystok, Poznań,  
Rzeszów)**
- 4. Institutes' Special Activities**
- 5. Task Force Activities**
- 6. Role of Task Force - suggestions**
- 7. Problems of Small Business in Poland**
- 8. Schedule for next all day meeting**

## TASK FORCE

1. Mieczysław Bąk  
Krajowa Izba Gospodarcza  
ul. Trębacka 4, 00-740 W-wa  
tel.: 27-47-58
2. Krystyna Gurbiel  
Z-ca Dyr. Generalnego  
Fundusz Współpracy  
ul. Żurawia 4a, 00-503 W-wa  
tel.: 5868/5825 694-60-69
3. Jerzy Iwicki  
Ministerstwo Przemysłu i Handlu  
Department Małych i Śr. Przeds.  
ul. Wspólna 4, 00-513 W-wa  
tel.: 21-18-20 fax: 628-36-42
4. Wojciech Kempisty  
Fundusz Współpracy  
Biuro Koordynacji Kształcenia Kadr  
ul. Koszykowa 79, W-wa  
tel.: 625-28-61/625-39-37
5. Marek Kozak  
Polska Agencja Rowoju Regionalnego  
(Biuro ds. Pomocy Zagranicznej)  
(Urząd Rady Ministrów)  
ul. Aleje Ujazdowskie 1/3, 00-950 W-wa  
tel: 604-75-55 fax: 29-48-88
6. Patric La Combe  
Labor Attache  
Ambasada Amerykańska  
ul. Aleje Ujazdowskie 29/31  
00-902 W-wa  
tel.: (22) 628-30-41
7. Nina Majer /Donald Presley/  
Magdalena Wyganowska  
U.S. AID  
ul. Aleje Ujazdowskie 29/31  
W-wa 00-902  
tel.: 628-30-41
8. Jolanta Tanaś  
Depart. Promocji Przedsiębiorczości  
tel.: 21-93-51/310  
Department Małych i Śr. Przeds.  
ul. Wspólna 4, 00-921 W-wa  
tel.: 528-38-31
9. Andrzej Lach  
Szkoła Bankowości  
ul. Smolna 10/12, 00-375 W-wa  
tel: 27-85-27
10. Zofia Wyderkowska  
Ministerstwo Edukacji Narodowej  
Al. 1 Armii Wojska Polskiego 25  
00-918 W-wa  
tel: 29-19-33 ext. 882
11. Ewa Banachowicz, dr nauk ekon.  
Polsko-Amerykańska Fundacja  
Doradztwa dla Małej Przedsiębiorczości  
ul. Emilii Plater, 00-118 W-wa  
tel.: 24-26-06 fax: 20-99-74
12. Mirosław Mironowicz  
Ministerstwo Przekształceń  
Własnościowych, W-wa  
tel.: 628-02-81 ext. 389/597  
fax.: 21-33-61
13. Krzysztof Mika  
Ministry of Labor and Social Policy  
Employment Department  
ul. Nowogrodzka 1/3, 00-513 W-wa  
tel.: (22) 29-07-87 fax: (2) 628-39-17
14. Mieczysław Pyzel  
Urząd Pracy  
Department Pośrednictwa Pracy  
ul. Tamka 1, 00-349 W-wa  
tel.: 26-70-61 ext. 147 fax: 263565



**APPENDIX**

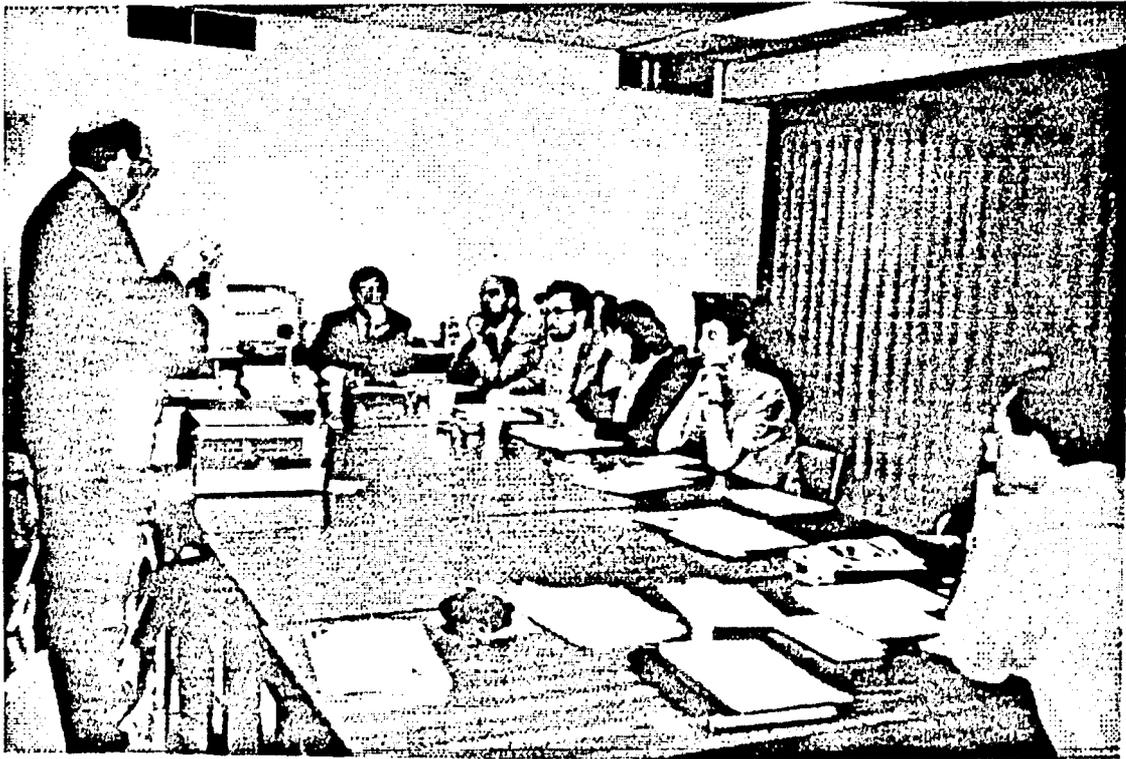
**6.0**

**POLISH SCHOLARS  
VISIT U.S.**

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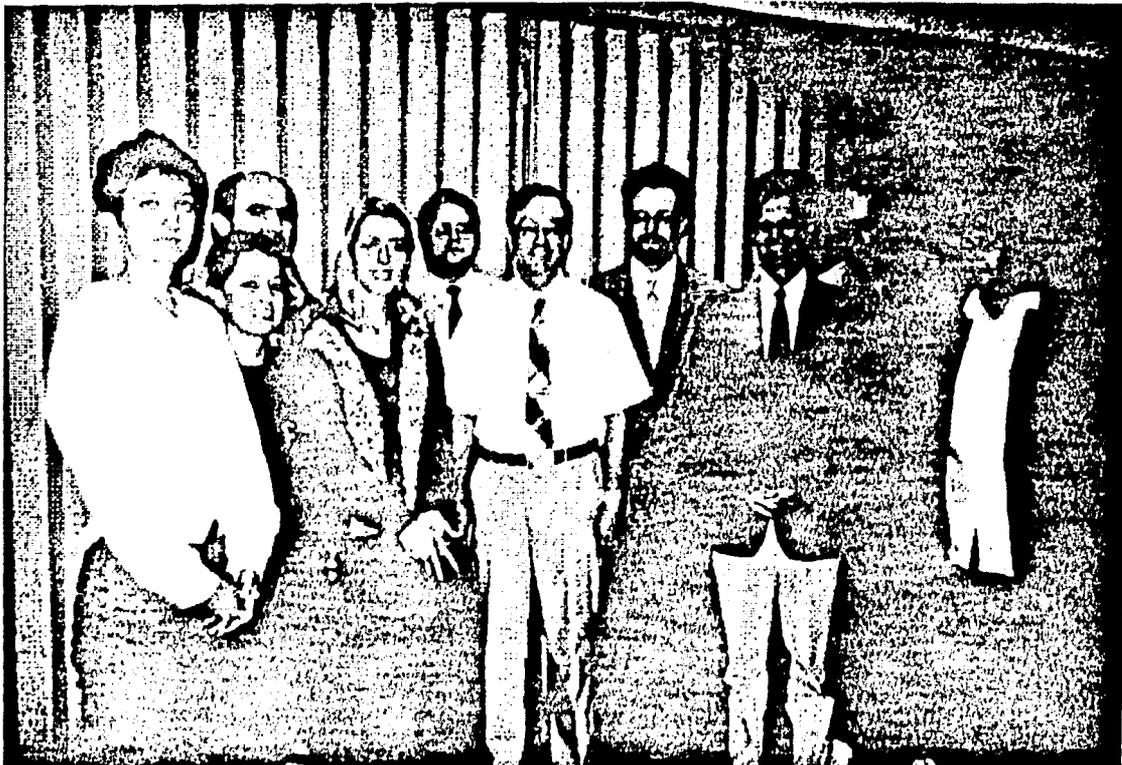
The group at CETE/OSU



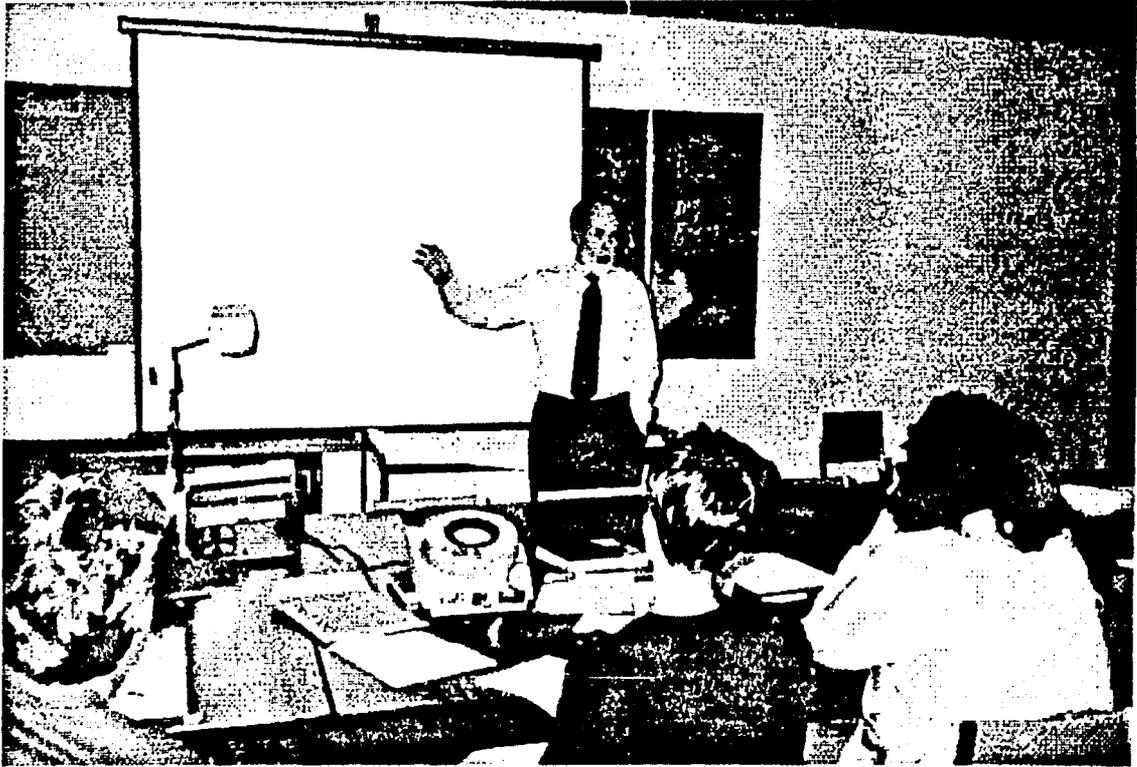
Dr. John Turner discusses Selling Seminar



Coordinators with Professor Janina Latack to discuss Team Building



Professor Roy Lewicki makes presentation on Negotiations



OSU Professor Wayne Talarzyk discusses Retail Management



Judy Wagner helps with E-mail

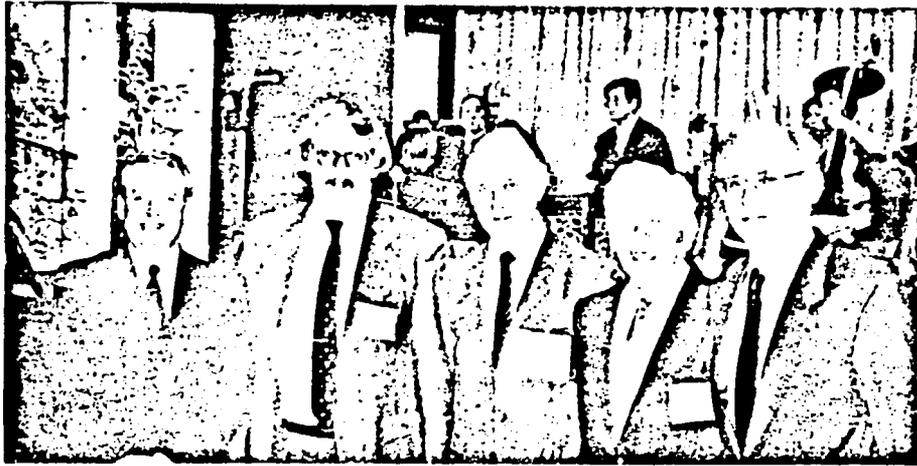
**A LIST OF POLISH SCHOLARS - THE INSTITUTES COORDINATORS**  
**June 19 - July 3, 1993**

1. Alicja Zajęzkowska - Solidarity Foundation, Gdańsk
2. Alicja Unterschuetz - Solidarity Foundation, Gdańsk
3. Adam Góral - Polish-American Entrepreneurship Institute,
4. Krzysztof Kaszuba - Polish-American Entrepreneurship Institute,  
Rzeszów
5. Bogusław Plawgo - Białystok Business School - Entrepreneurship  
Institute, Białystok
6. Andrzej Jurgilewicz - Białystok Business School - Entrepreneurship  
Institute, Białystok
7. Walery Lach - Polish-American Entrepreneurship Institute,  
Poznań
8. Ewa Dratwa - Polish-American Entrepreneurship Institute,  
Poznań

# ICSB Bulletin

INTERNATIONAL COUNCIL FOR SMALL BUSINESS Summer 1993/Vol. XXV No. 3

## ENTREPRENEURSHIP ACROSS CULTURES



Beijing's WASME Conference draws global representation: (l to r) Joop Vianen, Netherlands; Gene Gomolka, USA; Dieter Ibielski, Germany; Zoltan Roman, Hungary; Jean-Jacques Obrecht, France.

### TRAINING THE WORLD'S TRAINERS

Below, excerpts from the European Foundation of Management Development's *Focus Magazine*:

*"The Russians are quite rightly a proud people...capable, bright and highly educated, particularly in mathematics, science, and logic. Almost invariably they only need to be told something once. The mistake of western contacts is to assume that...it is acceptable to patronise or condescend. One glimmer of [that] and all relationships are at an end."*—John Chadwick

*"The western trainers crowding into the German market have not been able (or just have not wanted) to understand how the east Germans had to work.... Attitudes have become more important impediments to training than gaps in knowledge and know-how."*—Frank Stolt

*"Harmful misconceptions still exist about:*

- *Time value of money—resulting in entrepreneurs not feeling compelled to pay their debts on time.*
- *Competition—a socialist way of thinking [prevails]. 'I will take this piece of market and you will take this one, and we won't be in each other's way.'*
- *Open information—resulting in a reluctance to divulge much information on oneself or one's business activities, and mistrust of available information."*—William Prendergast

*"Those from a Western culture can have little perception of the shift in behaviour and attitudes required of Czech and Slovak managers."*—Dagmar Lesavoko

*"Sixty-one percent of Russian managers believe they should follow the instructions of their superiors, despite not fully agreeing.... In the West, only twenty-five percent would act in the same way."*—John Chadwick

### START-UPS IN KOREA

*Excerpts from a conference speech by Byong-Kyun Lee, executive vice president of the Korea Federation of Small Business and member of ICSB - Korea Affiliate.*

Despite a virtual nonexistence of capital and technological accumulation in the early 1960s, the Korean economy has achieved unparalleled growth, due largely to a government-led, export-oriented economic development policy and the Korean public's unswerving desire for "a better living."

However, amid the transition from authoritarianism to democracy, the Korean economy has faced unprecedented challenges. Domestically, the rapid rate of economic growth galvanized the demand for a fair distribution of income, price hikes and "collective egoism." Internationally, trade frictions, developed nations' reluctance to transfer technology and an accelerated chase by other developing nations contributed to an overall stagnation of the Korean economy, including a low rate of economic growth, price increases and a balance of payments deficit.

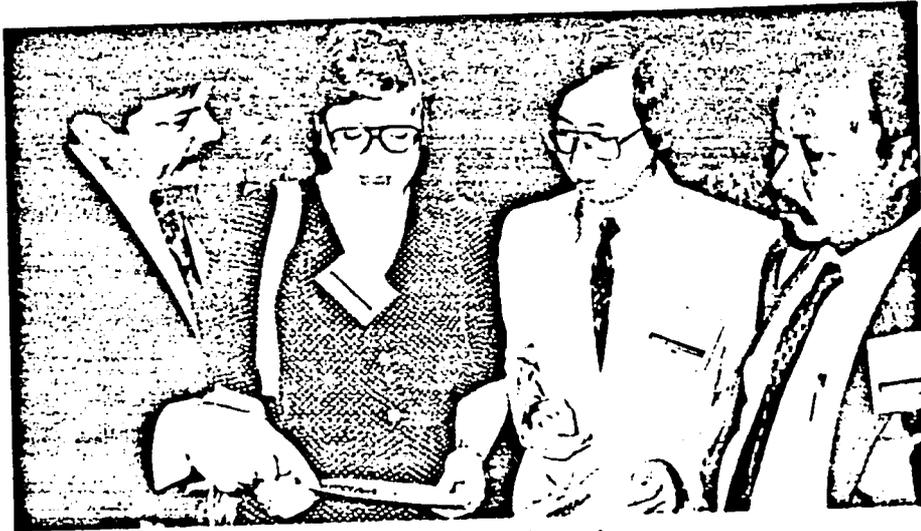
In 1992, around 10,000 SMEs went bankrupt, a whopping 47 percent increase over 1991. About 30 SMEs went out of business each day. The development of small and medium industry has emerged as a significant challenge, since SMEs contribute to higher efficiency, play a leading role in technological development, enhance industrial competitiveness and reduce unemployment.

The Korean government has implemented a wide array of policies to help existing SMEs and promote new ones.

(continued on page 3)

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# THE FREE TRADE CONFERENCE



*Free trade issues engage participants in lively discussions.*

The theme of the 1993 ICSB conference, "Free Trade: A Good Bet for Small Business?" couldn't have been more timely. With Europe '92 being implemented, the North American Free Trade Agreement (NAFTA) dominating business headlines in North America, the Tokyo G-7 meeting focus on trade, and world-wide calls to have the stalled GATT (General Agreement on Trade and Tariffs) talks put back on track, conference participants addressed many of the same issues confronting their elected leaders. The principal difference was the conference's small business focus.

## FREE TRADE IS A GOOD BET

The consensus at the Las Vegas meeting was that free trade is good for small business. Free trade:

- creates export opportunities;
- improves the export position of small business compared to its large competitors;
- offers cheaper and more diverse sources of supply;
- creates wealthier nations which, in turn, provides small businesses greater domestic opportunities.

## NOT EVERY FIRM WILL DO WELL

Because free trade is good for small business doesn't mean that free trade is

good for every small business. To the contrary, some small businesses will no longer be able to compete. Yet the critical factor from a policy perspective is distinguishing the large future, but currently intangible, good (free trade) from the small, but tangible harm ("fair" or managed trade). The critical factor from the managerial perspective is the understanding that we are in a world economy.

Success in achieving freer world trade means that everyone must resist the temptation to look on trade as a "zero-sum" game. Transactions between two firms in different nations do not mean that one gains while the other loses. Nor does it mean one country wins at the expense of the other. Everyone wins when everyone does well.

Perhaps this theme was summarized best by David Hume nearly two centuries ago when he wrote in the essay "Of the Jealousy of Trade" that "Not only as a man, but as a British subject, I pray for the flourishing commerce of Germany, Spain, Italy, and even France itself."

Small business owners and their advisors must focus on the opportunities inherent in free trade and impress them on their political leaders. Success will not come easily. Vested interests and weak economic conditions in much of the world encourage protectionism. But free trade makes sense.

## Korea *(continued from page 1)*

Procedures have been streamlined in banking, taxing, technical and administrative assistance.

A series of economic drives to create a "New Korea" has received full support from the Korean people. Voluntary participation and creativity has increased. Since unbounded demands and activities for profit maximization would widen the gap between rich and poor, today's entrepreneurship cannot be a simple-minded pursuit of its own interest, but should recognize public interest and social responsibility. It should also embody the spirit of an active participation in social welfare for the realization of an ideal society.

"Korea has opened up the champagne too early!" says a foreign magazine. For the entrepreneurs of our time it is necessary to give up extravagance, waste and vanity. They should be more diligent and frugal than those they employ, and should be simple and clean in their private lives. Entrepreneurs should be firmly willing to share a greater pain for a further advancement. This will be the spiritual starting point for the construction of a new Korea—as well as a new economy.

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Designer: Jeanne Rhodes  
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Phone: 314-658-3896  
Fax: 314-658-3897



*printed on recycled paper*

# ICSB



## WORLD CONFERENCE



*From intense debates over the urgencies, and the complexities, of free trade— to amiable arguments over the best good-luck talisman for the baccarat table or where everybody was going for dinner— our 38th conference was full of connections.*

## A VISIT OF POLISH COORDINATORS - COLUMBUS 1993

- June 23, Wednesday** - arrival at 9.30 p.m.; *Parke Hotel* - address: 3025 Olentangy River Rd. Columbus, OH 43210 phone# (614) 267-1111
- 24, Thursday** - **INTERNSHIPS:**  
8 a.m. **1/ *Epro Inc.*, - Boguslaw Plawgo**  
(156 East Broadway, Westerville, Phone # 882-6990  
manufacture business - tiles)
- 2/ *Elford Inc.*, - Ewa Dratwa & Alicja Unterschuetz**  
(555 S.Front St., Columbus OH 43215; phone # 221-7589 or 227 6050;  
construction services; a contact person: Ms Amy Cline,(our coordinators  
will have a meeting with President of the company Mr Jeff Copeland)
- 3/ *CALLIF FOODS* - Adam Góral & Krzysztof Kaszuba**  
(Fancy Fruits & Vegetables Toss Salad & Cut-Cleaned Vegetables)  
address: 4561 E 5 Ave.; contact person: Mr Mike Callif  
phone # 238-7300; Fax 238-7304
- 4/ *DAVID KREBS & Co. CAP'S Inc.* - Walery Lach & Andrzej Jurgilewicz**  
(s.b. financial consulting; address: 1021 E Broad Street, Columbus, OH  
43205; a contact person: Mr Tom Cosch; phone # 251 1120)
- 5/ *CASTO DON M ORGNZTN* - Alicja Zajaczkowska**  
(marketing assist. for shopping centers; Marketing Dept. address: 209  
E State St. Columbus; a contact person: Diane Zibell; phone # 228-5331)
- 3 p.m. • *Borders Book Shop* - optional
- 25, Friday:**  
7.30 a.m. **1/ *Mc Gowan & Goebbel Ltd.*, Columbus Gift Mart**  
address: 1999 West Belt Drive, Columbus, OH. a contact person: Mr Dick  
Mc Gowan, phone # 848-3611
- 2 - 4 p.m. **2/ *BANK ONE***  
(Sawmill; a contact person: Ms Barbara Wecksten phone # 248-5148)
- 26-27 (weekend)**  
Saturday - a tour - *Amish Home*  
Sunday - *shopping*

- 28, Monday**  
 8.30 a.m.  
 10 a.m.
- Overview of Year III proposal
  - *Selling* - Dr John Turner
- after lunch
- Discussion on new *Selling seminar*
  - Summary of last year experiences and preliminary planning sessions for the next - done by each Institute
- 29, Tuesday**  
 8.30 a.m.  
 10 a.m.
- Plans for Budget and Equipment
  - *E-mail* - Dr John Turner
- after lunch
- Business planning with Rod Terminello
  - Review of books with E. Jacowicz
- 30, Wednesday**  
 8.30 a.m.  
 10 a.m.
- *Parliamentary Procedure* - C. Ashmore
  - *Team Building* - Prof. Associate Janina Latack
- after lunch
- Discussion about new *Team Building seminar*
  - Discussion about new *Bank Marketing seminar*
  - Plan new courses - seminars
- July **1, Thursday**  
 8.30 a.m.  
 10 a.m.
- Discussion on *Cases* program
  - *Retail Management* - Prof. Wayne Talarzyk
- after lunch
- Discussion about new *Retail Management seminar*
  - Develop strategy for monitoring the program and getting qualitative data (e.g. new questionnaires, monitoring instructors, participant's expectations about additional courses)
- 6.30 p.m.
- Dinner with *CETE Staff*
- 2, Friday**  
 8.30  
 10 a.m.
- Plans for faculty upgrading workshops
  - *Negotiations* - Prof. Ray Lewicki
- after lunch
- Discussion about *Negotiations seminar*
  - Schedules for 1993-1994

## Polish American Enterprise Institutes

### Summary of Training Plans - 1993-94

#### Basic Course - Primary City

•	Bialystok	5
•	Poznan	3
•	Rzeszow	2

#### Basic Course - Satellite Cities

•	Bialystok	3
•	Poznan	4
•	Rzeszow	5

---

#### Total Basic Courses Offered

•	Bialystok	8
•	Poznan	7
•	Rzeszow	7

---

#### Other Courses/Seminars Planned

•	Bialystok	5
•	Poznan	7
•	Rzeszow	19

#### New Seminars Planned

•	Bialystok	6
•	Poznan	6
•	Rzeszow	6

## **Tentative Training Schedule**

### **Bialystok Enterprise Institute**

#### **July - September '93**

- Basic Training Course for Business Owners ..... Bialystok
- Start-up Course ..... Bialystok

#### **October - December '93**

- Basic Training Course for Business Owners ..... Bialystok
- Free Seminars ..... Satellite Cities

#### **January - March '94**

- Basic Training Courses for Business Owners (2) ..... Bialystok
- Basic Training Course for Business Owners ..... 3 Satellite Cities
- Start-up Course ..... Bialystok

#### **April - June '94**

- Basic Training Course for Business Owners ..... Bialystok
- Free Seminars ..... Satellite Cities
- Basic Courses for Business Owners (3 Satellites continued from January - March)
- Start-up Courses ..... Bialystok
- Selling Seminar ..... Bialystok
- Market Research Seminar ..... Bialystok
- Retail Management Seminar ..... Bialystok
- Team Building Seminar ..... Bialystok
- Negotiations Seminar ..... Bialystok
- Human Resource Management Seminar ..... Bialystok

## Tentative Training Schedule

### Poznan Enterprise Institute

#### July - December '93

- July computer courses (50 hours each) . . . . . Poznan
- Market research and consultancy services for the  
Szurgot Building Construction Co. . . . . Poznan

#### August - October '93

- Market Research for the Polonia Insurance Co. . . . . Poznan

#### September - October '93

- English Course (50 hours) . . . . . Poznan
- Basic Training Course for Business Owners . . . . . Poznan
- Basic Training Course for Business Owners . . . . . Konin
- Basic Training Course for upgrading professional skills  
of unemployed women

#### January - June '94

- Basic Training Course for Business Owners . . . . . Poznan
- English Course (40 hours) . . . . . Poznan
- Basic Training Course for Business Owners . . . . . Konin
- Computer Course (50 hours) . . . . . Poznan
- Basic Training Course for Business Owners (February) . . . . . Leszno
- Basic Training Course for Business Owners (April) . . . . . Poznan
- Basic Training Course for Business Owners (April) . . . . . Zelena Gora
- Team Building Seminar . . . . . Poznan
- Selling Seminar . . . . . Poznan
- Market Research Seminar . . . . . Poznan
- Human Resource Management Service . . . . . Poznan
- Negotiations Seminar . . . . . Poznan
- Retail Management Seminar . . . . . Poznan

## Tentative Training Schedule

### Rzeszow Enterprise Institute

#### July - September '93

- Selling Seminar . . . . . Rzeszow
- Export/Import Course . . . . . Rzeszow
- Computer Course . . . . . Rzeszow
- Basic Course for Business Owners . . . . . One Satellite
- Finance Course . . . . . One Satellite

#### October - December '93

- Basic Course for Business Owners . . . . . Rzeszow
- Basic Course for Business Owners . . . . . One Satellite
- Postgraduate Studies/Marie Curie Skladowska University
- Computer Courses (2) . . . . . Rzeszow
- Selling Seminar . . . . . Rzeszow
- Banking Seminar . . . . . Rzeszow

#### January - March '94

- Basic Course for Business Owners . . . . . Rzeszow
- Basic Course for Business Owners . . . . . One Satellite
- Export/Import Course . . . . . Rzeszow
- Export/Import Course . . . . . One Satellite
- Finance Course . . . . . One Satellite
- Computer Course . . . . . Rzeszow
- Postgraduate Studies/Marie Curie Skladowska University

#### April - June '94

- Basic Course for Small Business Owners . . . . . Two Satellites
- Export/Import . . . . . One Satellite
- Finance Course . . . . . Rzeszow
- Selling Seminar . . . . . One Satellite
- Finance Seminar . . . . . One Satellite
- Team Building Seminar . . . . . One Satellite
- Market Research Seminar . . . . . One Satellite
- Retail Management Seminar . . . . . Rzeszow
- Negotiations Seminar . . . . . Rzeszow
- Human Resource Management Seminar . . . . . One Satellite
- Computer Course
- Postgraduate Studies/MCS University

**QUESTIONNAIRE  
(Business Owners)**

1. Did you consider the Institute helpful for you?

2. In which of the courses did you find help?

Management \_\_\_\_\_

Finance \_\_\_\_\_

Marketing \_\_\_\_\_

Strategic plan. \_\_\_\_\_

Entrepreneurship \_\_\_\_\_

Export-Import \_\_\_\_\_

3. Would you like to use services of the Institute in the future?

4. Have you recommended the Institute program to your friends?

5. Other comments:

**QUESTIONNAIRE  
(Faculty)**

1. How and where have you been using Institute materials for educational purposes?
  
2. How has involvement in the Institute helped you in other activities?
  
3. Other than in Institute courses, please estimate use of any Institute materials with any types of students:

	# students	Hours per student
- Management		
- Marketing		
- Entrepreneurship		
- Strategic Planning		
- Finance		
- Export-Import		
  
4. What have you liked about being involved in the Institute?
  
5. What did not you like about being involved in the Institute?
  
6. What do you suggest the Institute do to assist you?
  
7. How would you like to work with us in the future?
  
8. Other comments:



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 15, 1993

Mr Mike Callif  
CALLIF FOODS  
4561 E 5 Ave.  
Columbus, OH

Dear Sirs,

On behalf of our Polish scholars *Adam Góral* and *Krzysztof Kaszuba* representing Small Business Institutes in Poland, established by CETE, we would like to express our appreciation to you for your kind cooperation in hosting our scholars at your business enterprise.

The Polish quests have been involved in small business development project funded by the U.S. AID in Poland and acted as project coordinators as well as managers of small business institute. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

The Polish scholars, in research for business knowledge would like to experience a day in the life of an American small business enterprise. As discussed he will visit your company on June 24, 1993.

Please find attached a brief description of our project.

We truly believe that your company will provide an excellent example of how business enterprise operate. This experience will also give our visitors an inside view into the everyday decision making process involved in operating a business.

Thank you very much for your generous contribution and cooperation.

Yours sincerely,

  
Elzbieta Jacowicz  
Program Associate  
Entrepreneurship

183



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 16, 1993

Ms Diane Zibell  
CASTO DON M ORGNZTN  
209 E State St.  
Columbus, OH

Dear Sirs,

On behalf of our Polish scholar *Alicja Zajczkowska* representing Economic Foundation Solidarność which in partnership with CETE established Small Business Institutes in Poland, we would like to express our appreciation to you for your kind cooperation in hosting the scholar at your business enterprise.

The Polish quest has been involved in small business development project funded by the U.S. AID in Poland and acted as a project coordinator. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

The Polish scholar, in research for business knowledge would like to experience a day in the life of an American small business enterprise. As discussed she will visit your company on June 24, 1993.

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Thank you very much for your generous contribution and cooperation.

Yours sincerely,

  
Elżbieta Jacowicz  
Program Associate  
Entrepreneurship

124



June 15, 1993



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

Mr Tom Cosch  
DAVID KREBS & Co.,  
1021 E Broad Street,  
Columbus, OH 43205

Dear Sirs,

On behalf of our Polish scholars *Walery Lach* and *Andrzej Jurgilewicz* representing Small Business Institutes in Poland, established by CETE, we would like to express our appreciation to you for your kind cooperation in hosting our scholars at your business enterprise.

The Polish quests have been involved in small business development project funded by the U.S. AID in Poland and acted as project coordinators as well as managers of small business institute. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

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Thank you very much for your generous contribution and cooperation.

Yours sincerely,

*Elzbieta Jacowicz*  
Elzbieta Jacowicz  
Program Associate  
Entrepreneurship

1/0



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 15, 1993

EPRO Inc.,  
156 E Broadway  
Westerville  
Columbus, OH

Dear Sirs,

On behalf of our Polish scholar *Bogusław Plawgo* representing Small Business Institutes in Poland, established by CETE, we would like to express our appreciation to you for your kind cooperation in hosting the scholar at your business enterprise.

The Polish quest has been involved in small business development project funded by the U.S. AID in Poland and acted as a project coordinator as well as a manager of small business institute. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

The Polish scholar, in research for business knowledge would like to experience a day in the life of an American small business enterprise. As discussed he will visit your company on June 24, 1993.

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Thank you very much for your generous contribution and cooperation.

Yours sincerely,

  
Elżbieta Jacowicz  
Program Associate  
Entrepreneurship



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 10, 1993

ELFORD Inc.,  
555 S Front Street  
Columbus, Ohio

Dear Sirs,

On behalf of our Polish scholar *Ewa Drarwa* and *Alicja Unterschuetz* representing Small Business Institutes in Poland, established by CETE in Poland, we would like to express our appreciation to you for your kind cooperation in hosting the scholars at your business enterprise.

The Polish quests have been involved in small business development project funded by the U.S. AID in Poland and acted as a project coordinators as well as managers of small business institutes. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

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Thank you very much for your generous contribution and cooperation.

Yours sincerely,

Elżbieta Jacowicz  
Program Associate  
Entrepreneurship

Internship 24th, June 1993

Don M. Casto Organization  
Marketing Department  
209 E. State Street  
Columbus, Ohio

Contact Person: Diane Zibel

The firm which I visited is a family business from three generations since 1920. The company activities are connected with developing, managing and leasing shopping centers, office buildings, corporate parks and multi-family residences. The company sets the standard for shopping center industry and provides marketing services for the persons who rent shops in shopping centers that are managed by the Don M. Casto Organization company.

I spent six hours being hosted by Diane Zibel, the director of the Marketing Department. She explained the organization structure of the firm, and told me a lot about her activities. She showed me how she plans annual activities of her department and organizes different kinds of marketing services for shopping centers. She also explained how she operates with finance.

I've got the package of materials which gave me additional information about the company and more specific information about the marketing services.

Diane took me to Dublin to show me one of the best shopping centers managed by the Don M. Casto Company. It was a very important visit for me. It gave me a lot of information and materials. Diana devoted much time answering my questions and showing how the business is run.

I appreciate very much the opportunity to spend time with her.

Alicja Zajackowska

Alicja Unterschuetz

Internship at the antique shop on 26th June, 1993.

My visit took place in a small shop selling pieces of furniture, glassware, dolls, and other antique objects.

The shop is run by two partners, and one of them has a computer background which helps him to deal with accounting and inventory management in a neat way.

Gary showed me pieces in his shop, answered my questions about prices, trends, ways of obtaining new stock, how to deal with clients (who buy from the shop and who sells for the shop). Once again, like after some other visits (in a bank, for instance), I was slightly surprised how business is alive in many ways, whether it operates in Poland or in the U.S.

It was an informative visit for me. There were some pieces of furniture especially interesting for me, and we discussed prices in Poland and U.S. We compared what is fashionable in our countries.

*DAVID KREBS & Co.,*

I visited DAVID KREBS & Co., CAP's Inc., which was a small business financial consulting firm. KREBS & Co., had about 400 individuals and 150 firms as clients. Thomas M. Koch, a senior accountant, was my host in the firm. He told me a little bit of the history of the firm, its organizational structure and computers application. He showed me different kinds of software which he used. He also described me the U.S.A. tax system and activities of KREBS & Co. I learned many new things about ways of working with small businesses.

My visit in KERBS & Co. Inc. was very fruitful and interesting.

Andrzej Jurgilewicz

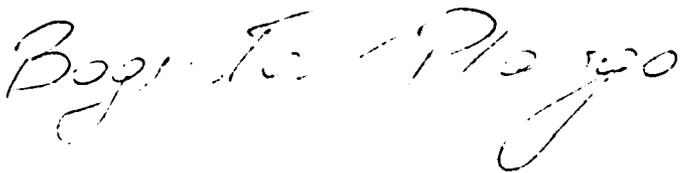
Andrzej Jurgilewicz

***EPRO*** Incorporated  
156 East Broadway  
Westerville, OH 43081

I visited *EPRO* Incorporated Company. At the beginning of my visit I saw offices and production accommodations. Then, Mr Greg Gordon who was Plant Manager told me the history of the firm. I also became acquainted with its organizational structure, computers application, price strategies and marketing activities.

My visit in *EPRO* was very interesting and useful for me.

Bogusław Plawgo

A handwritten signature in cursive script that reads "Bogusław Plawgo". The signature is written in black ink and is positioned below the printed name.

## **REPORT FROM THE VISIT TO CALLIFOODS**

**CALLIFOODS** is the family firm founded 85 years ago by grandfather of the present main owner Michael L. Callif. From the beginning the firm specializes in the distribution of fresh fruits and vegetables. Michael's grandfather was the owner of the grocery store which delivered fresh oranges and apples to the restaurants. Michael and his father developed their business in the meaning of the range of fruits and vegetables distributed by them and the amount of yearly sales.

### **ORGANIZATIONAL STRUCTURE OF THE FIRM**

Michael employs 18 people. They are involved in the following activities:

- 1 - ASSISTANT
- 4 - SALES DEPARTMENT
- 6 - TRANSPORT DEPARTMENT
- 6 - WAREHOUSE
- 2 - COMPUTER DEPARTMENT

Michael and sales people are responsible for contacts with customers.

### **MARKETING**

Michael uses the fact that the firm is on the market from 85 years. He does not advertise too much. He just prepares newsletter for his customers.

He specializes in delivering fresh fruits and vegetables especially to the restaurants.

He has 22 competitors.

Advantages of Michael's firm are following:  
history of the firm and computer system of information.

### **FINANCIAL SITUATION OF MICHAEL'S FIRM**

Sales - 10.5 million USD  
Gross profit - 0.2 million USD

**Expenses:**

25% - administrative expenses  
25% - wage expenses  
25% - transport expenses  
25% - other

Michael avoids bank loans although he does not have any problems with getting them.

The owner emphasized that his computer system is his main advantage in the relation to competitors. He introduced computers in 1984 as the only one in the group of competitive distributors.

### **CONCLUSIONS FOR POLISH BUSINESS OWNERS**

In the wholesale activity we should remember about:

- good using of our warehouse capacity (Michael achieved 10.5 USD of sales having at disposal 10,000 square feet)
- building of the image of the firm,
- good wage system for workers,
- necessity of using computer in accounting system, inventory, sales analysis per customer and customer listing.

Adam Goral

Krzysztof Kaszuba



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 30, 1993

Jeffrey L. Copeland  
Elford, Inc.  
555 South Front Street  
Columbus, OH 43215

Dear Jeff:

We cannot tell you how much we appreciated the visit in your company. We were overwhelmed by your hospitality and willingness to share with us information about Elford. We enjoyed the lunch immensely not only because of the delicious food, but also owing to the fascinating ideas of team work and company philosophy, all of it put in such an interesting and entertaining manner.

We would also like to thank Carol, Ann, Chris and Jay for their efforts to acquaint us with the marketing, financial and managerial aspects of Elford's operations.

We are certain that the knowledge we acquired in your firm will prove extremely useful in the case of the Polish construction company.

Thank you very much for your inspiration and immense help as well as for making us feel at home.

Hoping to stay in touch, with very good wishes,

*Ewa and Walery*  
Ewa and Walery



**ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ**

80-855 GDAŃSK  
ul. Waly Piastowskie 24  
POLAND

tel. 384-412, 384-319  
tlx. 513170, 513160  
fax. 384219, 317121

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July 2, 1993

Greg Gordon  
Epro Incorporated  
156 East Broadway  
Westerville, OH 43081

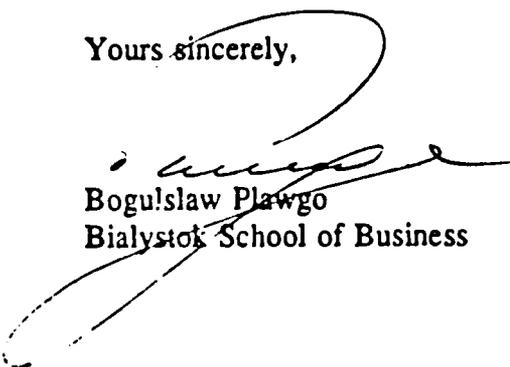
Dear Greg:

By means of this letter, I would like to thank you for time you spent with me during my internship in your firm.

Thank you also for the opportunity to be able to listen to your description of your work and with which you answered all the questions connected with your business activities.

I am looking forward to being in touch with you.

Yours sincerely,



Boguslaw Plawgo  
Bialystok School of Business

June 30,1993

SMALL BUSINESS INSTITUTE  
UL.ZYGMUNTOWSKA 2a  
RZESZOW  
POLAND  
tel/fax:(48)(17)328-58

Michael L.Callif  
President  
CALLIFOODS  
4561 East Fifth Avenue  
Columbus,Ohio 43219

Dear Michael:

We are grateful that you found such a lot of time to show us your firm.Especially we are happy that you wanted to answer all our questions.Your firm can be a pattern for our business owners how to organize distribution of fresh fruits and vegetables.

We are going to share conclusions from the conversation with you with the members of our SBI Century Club.

With many thanks for your hospitality we hope that one day you will visit our country.

Sincerely,

Adam Goral

Krzysztof Kaszuba

Kaszuba



**ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ**

80-855 GDAŃSK  
ul. Waly Piastowckie 24  
POLAND

tel. 384-412, 384-319  
tx. 513170, 513160  
fax. 384219, 317121

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Columbus, 28th June 1993  
Ms. Diane Zibell  
Marketing Department  
Casto Don M Organization  
209 E State Street  
Columbus, OH 43215

Dear Diane,

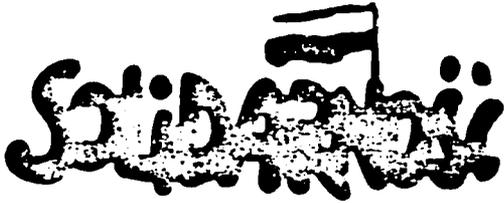
By means of this letter I would like to thank you for the time you spent with me during my internship in your firm.

Thank you also for the opportunity to be able to listen to your description of the merits of your work. The trip to the Shopping Center in Dublin was interesting and informative. Also, I hope to make use of the materials you gave me.

I am looking forward to being in touch with you.

Yours sincerely,

Alicja Zajaczkowska  
Director of Education Affairs  
Economic Foundation "Solidarnosc", Gdansk, Poland



**ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ**

80-855 GDAŃSK  
ul. Wały Piastowskie 24  
POLAND

tel. 384-412, 384-319  
tix. 513170, 513160  
fax. 384219, 317121

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Columbus, 29th June 1993

Mr. Gary Cummings  
Mr. Chris Canaday

Gary Christopher's  
Antiques, Collectibles, Americana  
2258 E. Main St.  
Bexley, OH 43209

Dear Gary,

By means of this letter I would like to thank you for your time and patience with which you answered all the questions connected with your business activities.

I appreciate very much the opportunity to be able to see how you operate, although I realize that due to the short time period it was only a part of your activities we could talk about.

I am looking forward to our possible future contacts.

Yours sincerely,

Alicja Unterschuetz  
Coordinator  
Economic Foundation "Solidarnosc", Gdansk, Poland

## **STRATEGY FOR DEVELOPING NEW SEMINARS**

- Three Institutes**
- same capacity
  - materials
  - faculty expertise
  - image

### **Process:**

- July** - Consultants agree to assist
- July/August** - Consultants identify key topics and resources for Polish Coordinators
- August** - Coordinators pick Faculty Team
- August** - Coordinators/Faculty read materials
- September** - Polish Team develops course outline /translate into English
- October** - Consultants reviews course outline - suggests materials still needed
- November** - Polish Team prepares seminar materials
- Nov.-Dec.** - Consultant reviews seminar materials with Elżbieta Jacowicz
- Dec.**
- Polish Team shares draft with all Institutes
  - Polish Team finishes materials
- March** - 3 Seminars scheduled for Faculty Training in 3 sites (Selling, Negotiations, Market Research)
- April** - 3 Seminars scheduled for Faculty Training in 3 sites (Retail Management, Human Resource Management, Team Building)
- May-June** - 6 seminars offered as Test of materials

**The OSU FACULTY/CONSULTANTS ROLE  
IN PREPARING NEW SEMINARS**

- 1/ Identify key topics - resources to read (July)
- 2/ Review Teaching outline - suggested additional materials (October)
- 3/ Review seminar content with Elżbieta Jacowicz (Nov.-Dec.)
- 4/ Travel to Poland for Faculty Training meetings in 3 sites (2 weeks)
  - March - Selling, Negotiations, Market Research
  - April - Retail Management, Human Resource Management, Team Building

June 3, 1993

Professor Janina Latack  
Ohio State University  
317D Hagerty Hall,  
1775 College Road

Dear Professor,

We would like to thank you very much that you accepted our invitation to give a presentation on "team building" to our visiting scholars from Poland.

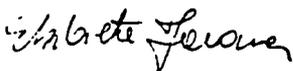
The Polish guests have been involved in small business development project funded by the U.S. AID in Poland and acted as project coordinators as well as managers of small business institutes. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.

The purpose of current visit is to enhance their knowledge and understanding of business related activities.

Please find attached a brief description of our project.

We are very happy that you agreed to share your experience and we are looking forward to seeing you at our Center, on June 30, at 10 a.m.

Yours sincerely,



Elzbieta Jacowicz  
Program Associate  
Entrepreneurship

**June 10, 1993**

**Mr Wayne Talarzyk, Professor  
The Ohio State University  
1775 Collage Road  
249 Hagerty Hall**

**Dear Professor,**

**We would like to thank you very much that you accepted our invitation to give a presentation on retail management to our visiting scholars from Poland.**

**The Polish guests have been involved in small business development project funded by the U.S. AID in Poland and acted as project coordinators as well as managers of small business institutes. The small business institutes provide trainings and support services for small businesses in three locations Poznań, Rzeszów and Białystok.**

**The purpose of current visit is to enhance their knowledge and understanding of business related activities.**

**Please find attached a brief description of our project.**

**We are very happy that you agreed to share your experience and we are looking forward to seeing you at our Center, on July 1, at 10 a.m.**

**Yours sincerely,**

*Elzbieta*

**Elzbieta Jacowicz  
Program Associate  
Entrepreneurship**



1900 Kenny Road  
Columbus, Ohio 43210-1090

Phone: 614-292-4353  
Telex: 9102505950  
Fax: 614-292-1260

June 3, 1993

**Mr Ray Lewicki, Professor  
The Ohio State University  
419 Hagerty Hall  
College of Business**

Dear Professor,

We would like to thank you very much that you accepted our invitation to give a presentation to our visiting scholars from Poland.

The Polish guests have been involved in small business development project funded by the U.S. AID in Poland and acted as a project coordinator as well as managers of small business institutes in three locations - Poznań, Rzeszów, Białystok. The small business institutes provide trainings and support services for small businesses in the locations.

Negotiations have been a part of the management training and we had the pleasure to use materials developed by you. It will be a valuable experience for our visitors to meet the distinguish author in person and have an opportunity to learn more.

The purpose of current visit is to enhance their knowledge and understanding of business related activities.

We would like to leave the specific topic open for your decision, however, we may suggest our visitors might appreciate a presentation on how to effectively teach negotiations and what active techniques to use.

Please find attached a brief description of our project and information about our visiting scholars.

We are very happy that you agreed to share your experience.  
Thank you again for your contribution and we are looking forward to seeing you at our Center, on July 2, 1993, at 10 a.m.

Yours sincerely,  
*Elzbieta Jácowicz*  
Elzbieta Jácowicz  
Program Associate  
Entrepreneurship

**CENTER ON EDUCATION AND TRAINING FOR EMPLOYMENT (CETE)  
COLLEGE OF EDUCATION  
THE OHIO STATE UNIVERSITY**

**PROJECT PROFILE**

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**Creating Enterprise Institutes in Poland**

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**PURPOSE:**

The goal of this project is to encourage the teaching of market economics education in universities and colleges in Poland with emphasis on entrepreneurship, small business management, marketing, finance, and small business consulting.

**PROGRAM DESCRIPTION:**

CETE, in partnership with Solidarity Union's Economic Foundation in Poland, will conduct a 3-year training and curriculum design project with the following purposes:

- o To provide a series of courses at three established university-based Management Centers that will focus on small business startup and operations. The three sites selected are Poznan, Rzeszow, and Bialystok.
- o To enable existing and new university economics professors to be competent in teaching entrepreneurship, small business management, marketing, finance, and small business consulting.
- o To provide curriculum for Entrepreneurship Institute courses that are adapted to the Polish environment and available in Polish.
- o To offer a variety of spinoffs that can enhance the university professors' competence and make information available to other professors and the public.

This project focuses on the birth and growth of small business by "educating the educators" in Poland. By learning to use the curriculum and teaching strategies in the Enterprise Institutes, faculty are expected to become confident and familiar with these new concepts. The curriculum will be established by a team of U.S. university-based consultants working with economics professors in Poland. University-to-university relationships will be fostered in train-the-trainer activities, task force activities, and the annual national conference for university professors country-wide.

Support programs, natural spinoffs of the market economics education program, will be implemented through these trained Polish faculty leaders as well as the Polish people already working on entrepreneurship education in Ohio State's program for the Polish unemployed. They will include development of case studies of successful Polish entrepreneurs, preparation of videos of these entrepreneurs to be used on TV and in the classroom, and seminars for bank employees and government officials. Such activities will be available to the general population and serve as a catalyst to market reform in Poland.

**COLLABORATING PARTNERS:**

Solidarity Economic Foundation  
International Consortium for Entrepreneurship Education  
U.S. Agency for International Development

**PROJECT PERIOD:  
CONTACT PERSON:**

July 1, 1991 - June 30, 1994  
Dr. Cathy Ashmore, Project Director  
International Enterprise Academy  
800-848-4815, 614-292-4353, or FAX 614-292-1260

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## Information about our visiting scholars - coordinators of our project

1. **Krzysztof Kaszuba, Ph.D** - he wrote his doctor's thesis on "A Reform of International Monetary System and Developing Countries"; He works at Rzeszów Polytechnic as a academic teacher; He is a manager of an economic section of *A-Z Newspaper* published in Rzeszów region; He is a director of Polish-American Entrepreneurship Institute in Rzeszów established under our project where he conducts trainings in the field of management;
2. **Adam Góral, Ph.D** - works at Maria Curie-Skłodowska University, The Department of Economy in Rzeszów; He is a chairman of the *JAZCOOP Ltd.*, - food processing and computer programming and a vice director of Polish-American Entrepreneurship Institute in Rzeszów.
3. **Walery Lach** - graduated from Academy of Economics in Poznań where he works as an assistant at Department of Trade and Services. He is preparing his doctor's thesis on "Marketing Strategies on the Computer Market in Poland"; He conducts seminars on marketing, sales management, microcomputers in trade; He also developed materials on marketing with a special stress on price and distribution strategies; He is a co-author and a member of editorial board of the newest marketing magazine in the Eastern Europe "Businessman Magazine".
4. **Zdzisław Krajewski, Ph.D.** - Poznań Academy of Economics; His background is management.
5. **Andrzej Jurgilewicz** - an assistant working at Department of Economy, Białystok University; He is working on his doctor's thesis from the theory of economic development. His main focus is a theory of a company (costs, forms of competitions, marketing strategies etc.). He runs seminars on finance issues.
6. **Bogusław Prawgo** - an assistant working at Department of Economy, Białystok University; He is working on his dissertation from microeconomy.
7. **Alicja Unterschuetz** - graduated from Gdańsk University; She is a project Director working for Gdańsk Solidarity Foundation - our collaborating partner in Poland.
8. **Alicja Zajączkowska** - graduated from Gdańsk University; She is a program coordinator working for Gdańsk Solidarity Foundation in Poland.



Roy J. Lewicki  
College of Business  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
Phone 614-292-0258  
Home/Fax 614-488-0548

July 3, 1993

Dr. Catherine Ashmore  
International Enterprise Academy  
CETE  
1900 Kenny Road  
CAMPUS

Dear Dr. Ashmore:

It was a pleasure to address the Polish group on Friday. Enclosed please find the materials I think they wanted:

1. Copies of two different forms that participants in negotiation role plays can use to give peer feedback to each other.
2. A copy of a "reputation index" that I used in my course this Spring, so that students could generally evaluate those with good and bad negotiation reputations. The approach is explained in my course outline.

I cannot remember what else you required. If there were other things, please call me or drop me a note.

If participants are interested in some form of a follow-up event, I would be pleased to discuss this with you.

Best regards,

OB 448 Negotiations  
Spring, 1993

Individual Feedback Forms

Date:

Name of Partner:

Negotiating Skills:

1. Expresses strong feeling appropriately

- recognizes feelings in self and others
- uses range of emotional expression
- relates tone to substance

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

2. Remains rational in the face of strong feelings

- acknowledge others' feelings
- withdraws to regain composure when necessary
- encourages others' expressions of emotions

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

3. Is assertive without damaging the relationship

- separates relationship issues from substantive issues
- is open, polite, courteous, considerate
- has something to assert: focuses on substantive points
- is firm, yet open to alternative persuasive views

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

4. Improves relationship without damage to a particular negotiation.

- acknowledges merit in others' work
- acknowledges reliance on others' participation

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

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5. Speaks clearly in ways that promote listening

- speaks for self
- avoids assumptions about others' motives, thoughts, feelings
- uses short, clear sentences
- asks others to repeat back what was said

---

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

---

6. Inquires and listens effectively

- allocates time to listen and understand others
- allows others to state full argument before responding and judging
- repeats others' statements in own words
- inquires about others' reasoning

---

EXTREMELY POOR	POOR	REASONABLE	GOOD	EXCELLENT		
1	2	3	4	5	6	7

---

General Comments:

## **MHR 802: Reputation Index**

This questionnaire concerns the reputation garnered by students during the semester in Managerial Negotiations. Please follow the instructions closely. You must return this questionnaire with your name on it, even if you choose to make no further marks.

On the next page, you will find a list of all the students in the course. Do the following:

1. Write your own name in the upper right hand corner.
2. In the first column after the names, "check" all of the people who were either a partner and/or an opponent in the class exercises (e.g. the PD game, Used Car, Eazy's Garage, Porsche) and three graded role plays. These are the people with whom you had "direct experience".
3. In the second column after the names, regardless of whether you had direct negotiation experience or not, circle "G" for up to 6 people who you think have developed good negotiating reputations. You may circle any number of names up to 6.

Good bargaining reputations are gained by displaying honesty, competence, trustworthiness, integrity and so on.

4. In the third column after the names, regardless of whether you had direct negotiation experience with them or not, circle "B" for up to 6 people who you think have developed bad negotiating reputations. You may circle any number of names up to 6.

Bad bargaining reputations are gained by displaying dishonesty, incompetence, lack of trustworthiness or integrity, and so on.

These ratings will be summarized for each individual and count for up to 20 points, or 10% of your grade.

5. You can also gain extra credit in your class participation for contributing to others' learning through good feedback, insightful participation or other actions (intended or otherwise) that help people learn. In the fourth column, circle "C" for up to five classmates (not including yourself) who have contributed substantially to your learning in this course.

6. Make any comments you wish to support your marks in the final column.

7. Return this questionnaire to Professor Lewicki by May 28 (in class, under my office door- 419D Hagerty, in the MHR office in 356 Hagerty, or in the faculty mail room opposite the Hagerty elevator). Failure to receive your questionnaire will result in an incomplete in this assignment.

Name \_\_\_\_\_

	<u>Direct Exper?</u>	<u>Good Rep?</u>	<u>Bad Rep?</u>	<u>Contrib. to Learning?</u>	<u>Comments</u>
Jack Arnett		G	B	C	
David Barnes		G	B	C	
Don Capobres		G	B	C	
Alice Chi		G	B	C	
Casey Cuddy		G	B	C	
Tom Daniels		G	B	C	
Julie DeDomenic		G	B	C	
Scott Dumbauld		G	B	C	
Jim Garvey		G	B	C	
George Gose		G	B	C	
Robin Griggs		G	B	C	
Craig Halliday		G	B	C	
Steve Henck		G	B	C	
Kia Hodges-Harper		G	B	C	
Julie Janzaruk		G	B	C	
Sasha Karev		G	B	C	
Nancy Leser		G	B	C	
Rob Litchfield		G	B	C	
Greg Luce		G	B	C	
Erika McGonigle		G	B	C	
Paul McLeister		G	B	C	
Darryle Melson		G	B	C	
Chris Meyer		G	B	C	

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Doug Muzzy	G	B	C
Sarah Nye	G	B	C
Gerry Pfister	G	B	C
Brian Salerno	G	B	C
Mark Stadnik	G	B	C
Alex Swaneck	G	B	C
Mark Swedan	G	B	C
Jim Tanner	G	B	C
Liz Thompson	G	B	C
Cemil Unal	G	B	C
Chris Wenzke	G	B	C
Mike Werstine	G	B	C
Peggy Wible	G	B	C
John Willert	G	B	C
Julie Zoog	G	B	C

## SELECTED READING ON NEGOTIATION AND DISPUTE RESOLUTION

### Practitioner-oriented:

- Lewicki, Roy J. and Litterer, Jos., Minton, John and Saunders, David. Negotiation. Second Edition. Homewood, IL: Richard D. Irwin, 1994, forthcoming.
- Lewicki, Roy J., Litterer, Jos., Saunders, David and Minton, John.. Negotiation: Readings, Exercises and Cases. Second Edition. Homewood, IL: Richard D. Irwin, 1993.
- Bazerman, Max and Neale, Margaret. Negotiating Rationally. New York: Free Press, 1992.
- Bramson, R. (1981) Coping with Difficult People. New York NY: Dell.
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- Cohen, Raymond. Negotiating Across Cultures. Washington, DC: US Institute of Peace, 1991.
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- Fisher, R., Ury, W. and Patton, B. Getting to Yes. Second Edition. New York: Penguin Paperbacks, 1992.
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- Jandt, Fred and Gillette, P. Win-Win Negotiating. New York: John Wiley, 1985.
- Karrass, Gary. Negotiate to Close. New York: Fireside (Simon and Schuster), 1985.
- Lax, David and Sebenius, James. The Manager as Negotiator. New York: Free Press, 1986.
- Lertiz, Leonard. No-Fault Negotiating. Portland, OR: Pacifica Press, 1987.
- March, Robert M. The Japanese Negotiator. New York: Kodansha America, 1988.
- Nierenberg, Gerard. Fundamentals of Negotiating. (Revised) New York: Hawthorne Books, 1986.
- Nierenberg, G. and Calero, R. (1971). How to Read A Person Like A Book. New York: Pocket Books.
- Shea, Gordon. Creative Negotiating. Boston: CBI Publishing, 1983.
- Smith, H. B. Selling Through Negotiation. New York: AMACOM.
- Ury, William. Getting Past No: Negotiating With Difficult People. New York: Bantam, 1991.

**Software:**

Negotiator Pro Planning Software, Beacon Expert Systems, 35 Gardner Road, Brookline, MA 02146, 617-738-9300.

**Using Power and Influence**

Cohen, David and Bradford, David. Influence without Authority. New York: John Wiley, 1990.

Covey, Stephen R. The Seven Habits of Highly Effective People. New York: Fireside Book, 1990.

Pfeffer, Jeffrey. Managing with Power. Boston: Harvard Business School Press, 1992.

Zuker, Elaina. The Seven Secrets of Influence. New York: Mc Graw Hill, 1991.

**Conflict Management, Third Party Behavior and Alternative Dispute Resolution**

Donohue, Willaim A. and Kolt, Robert. Managing Interpersonal Conflict. Newbury Park: Sage Publications, 1992.

Folberg, J. and Taylor, A. Mediation. San Francisco: Jossey Bass, 1984.

Folger, J. , Poole, M.S. and Stutman, R.K. Working Through Conflict. New York: Harper Collins, 1993.

Moore, C. The Mediation Process. San Francisco: Jossey Bass, 1986.

Susskind, Lawrence and Cruikshank, Jeffrey. Breaking the Impasse. New York: Basic Books, 1987.

Ury, William, Brett, Jeanne and Goldberg, Stephen. Getting Disputes Resolved. San Francisco: Jossey Bass, 1988.

**Research Oriented:**

Bazerman, M. and Lewicki, R. J. Negotiating in Organizations. Beverly Hills: Sage Publications, 1983.

Lewicki, R. J., Sheppard, B. H. and Bazerman, M. (Eds). Research on Negotiation in Organizations. Stanford, CT: JAI Publishing Company. Vol 1: 1986. Vol 2: 1990. Vol. 3: 1991. Vol 4: 1993.



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Columbus, Ohio 43210-1090

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June 17, 1993

Mr John Turner Ed.D.  
1013 Wynngate Drive  
Chesapeake, Virginia 23320

Dear Mr J. Turner,

I would like to thank you very much that you accepted our invitation to give presentations on "*Selling*" and "*E-mail*" to our visiting scholars from Poland.

The Polish guests have been involved in small business development project for two years and acted as project coordinators as well as managers of small business institutes.

The purpose of current visit is to enhance their knowledge and understanding of business related activities.

I am sending you by mail a copy of our materials related to "*Selling*" and "*E-mail*".

As far as your room reservation is concerned, please be informed that it was made at Parke Hotel which address is: 3025 Olentangy River Rd. Columbus, OH 43210, phone# (614) 267-1111 and your reservation # is J0 627 BF.

Please find attached a program of our visiting scholars in Columbus.

I am looking forward to seeing you at our Center.

Please feel free to call me home if you need any kind of assistance. Here is my address:  
23 E Second Ave., Columbus OH 43 201, phone # 291 1792.

Yours sincerely

Elżbieta Jacowicz  
Program Associate  
Entrepreneurship

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**POLISH ENTREPRENEURSHIP INSTITUTES' COORDINATORS**

**EVALUATION FORM**  
U.S. trip, June - July, 1993

1. Please list the 3-5 most valuable and useful ideas, concepts and experiences you obtain from:

a/ the participation at the 38 ICSB conference in Las Vegas:

- I learnt what organization errors I should avoid while preparing our Forum.
- I met new interesting people and heard about new ideas how to support small businesses.(2)
- good experience
- the idea how to organize the network of SBI (2); methods of analysis of the role of small business in the economy of the whole country (2); trends in Small Business Management in the U.S. (2)

b/ the internship:

- The rules governing antique dealers activities are similar in the U.S.A. and Poland
- very good practical experience, a lot of new information
- How to manage effectively in the wholesale business (fresh fruits and vegetables) (2); How to organize sales department in a small firm (2)

c/ the workshops conducted by the OSU faculty/consultants

1) *Team Building* by prof. Janina Latack

- very interesting
- I learned about team building. It would be useful in our work as coordinator and help us to organize new seminars
- very good
- idea of Team Building seminar (2); Team concepts (2); Leadership and Teams (2)

2) *Retail Management* by prof. Wayne Talarzyk

- very interesting lecture (3)
- very good
- trends in retail trade; how to teach marketing (2)

**3) *Negotiations* by prof. Roy Lewicki**

- very interesting;
- I am very interested in negotiations. We hope prof Lewicki help us to improve our seminars. (2)
- very good
- How to organize negotiation seminar (2); How to teach negotiations (2)

**4) *Selling and e-mail* by dr. John Turner**

- New information about E-mail
- Thanks to him we will be able to instal e-mail in Białystok (2)
- good
- How to use e-mail (2)

**2. Which of these ideas and concepts will you use with your work at the institute and why?**

- All
- All ideas because they are new for me and I am aware that I still need American experts help. (2)
- the concept of team building and negotiation
- How to build the network of SBI (will of building of stronger structure) (2); How to build effective team (we are on the stage of building of SBI team) (2); How to organize Team Building seminar (I am responsible for such a seminar in Poland)

**3. What experiences and activities did you enjoy the most?**

- Participation in seminars in CETE
- 38 th ICSB conference and meetings with experts (2)
- The visit at the Marketing Agency in Columbus
- ICSB conference, the internship the lecture of Janina Latack and visit to the Bank (2)

**4. What problems or concerns did you have with this trip?**

- No problems (6)

**5. How could we have improved your learning experience?**

- More practice, contacts with consultants
- More lectures of good professors. (2)
- I would like to be a participant of the lectures at the US collage or university.
- longer seminar from Selling; more contacts with real businesses (2).

## **"Presentations"**

### **Presentators' Materials:**

- **Team Building**
- **Retail Management**
- **Negotiations**
- **E-Mail**
- **Selling**

# Practices of Exemplary Leaders

## Challenging the Process

- Searching for Opportunities
- Experimenting

## Inspiring a Shared Vision

- Envisioning the Future
- Enlisting Others

## Enabling Others to Act

- Fostering Collaboration
- Strengthening Others

## Modeling the Way

- Setting an Example
- Planning Small Wins

## Encouraging the Heart

- Recognizing Contributions
- Celebrating Accomplishments

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## **CHARACTERISTICS OF AN EFFECTIVE TEAM**

While researching this book, we asked more than two thousand managers to define an effective team. We found ten characteristics that were almost universally named. We will explore the main conclusions from our survey in the following pages.

Many of the managers recognized that effective teams skillfully combine appropriate individual talents with a positive team spirit to achieve results. Some of the characteristics named are paradoxical and seem to contradict one another. This is, in fact, true: effective teamwork is the synthesis of apparently contrary forces.

### ***Characteristic 1: Conflict***

It is widely thought that effective teams are harmonious and unified. Not so. Excessive harmony can encourage intellectual dishonesty. Challenge, openness, and veracity among team members is an essential characteristic of team effectiveness.

### ***Characteristic 2: Discipline***

There comes a time when teams need to do what they are told. This is true even at the most senior levels of government. After a policy has been agreed on by a senior group, implementation is mandatory; the team has to play its allotted part. Imagine what would happen if the brass section in a symphony orchestra decided to play "When the Saints Come Marching In" during Beethoven's Fifth Symphony.

### ***Characteristic 3: Energy***

In an effective team, members gain strength from one another. Collectively, they feel more potent and find that team activities renew their vitality and enjoyment. The word "synergy" was coined to describe this special group energy. Synergy has been explained with this mathematically improbable, but psychologically accurate, equation:  $2 + 2 = 5$ . A team's power goes beyond the sum of its individual members. A team has the capacity for synergy—a group energy that can deliberately be developed and utilized.

### ***Characteristic 4: Learning***

Effective team members continually learn better ways of working together. They review their experiences in order to critique both individual and team performance. Interestingly, teams operate like organisms; in a way, they learn regardless of who the members are.

### ***Characteristic 5: Methodology***

Teams often are required to solve problems and make decisions. A shared methodology of problem solving is an essential discipline. Often, innovative solutions are needed, so teams need to be genuinely creative.

### ***Characteristic 6: Objectives***

Every team needs a purpose that is understood, shared, and considered worthwhile by its members. This purpose can be described as the team's *mission*. Teams derive their objectives from their missions. Objectives take the form both of broad team objectives and of specific objectives for each member. Teams draw strength and direction from a deep, shared understanding of common purpose and from an understanding of how each member's objectives contribute to the achievement of the team's broader purpose.

### ***Characteristic 7: Output***

The "acid test" of a team is its capacity to deliver the goods. High standards are essential. A team is capable of achieving results (both in quality and quantity) that its members cannot achieve in isolation. Team members' diverse talents combine to create end products that are beyond individual members' capabilities.

### ***Characteristic 8: Structure***

A mature team has dealt with thorny questions about control, leadership, procedures, organization, and roles. The team's structure is finely attuned to the tasks that are undertaken. Individual talents and contributions are utilized without confusion. Team members with a drive for leadership have learned to understand one another and to cope with any feelings of hostility, competitiveness, or aggression. Mature teams are flexible, responsive, orderly, and directed.

### ***Characteristic 9: Mutual Support***

Members of an effective team develop a distinctive team spirit that encourages mutual respect, support, and simple enjoyment of one another. Team members identify themselves with their team. Team success or failure affects each member, and the members will extend themselves to serve the interests of the team. Effective teams have an atmosphere that supports confidence sharing, effective listening, problem solving, and risk taking.

### ***Characteristic 10: Team-Member Fulfillment***

High-performing teams look after their members in more ways than through providing a menu of psychological rewards. Team members actually grow in stature through their membership. Their potential is recognized and developed.

## Assessment of Leadership Actions

The following checklist gives you an opportunity to assess some of your strengths and development areas related to five key practices. How would you rate your leadership competence in each of the areas listed below using the following scale?

3 = Strength -- I do this very well

2 = Competent -- I do this moderately well

1 = Development Area -- I definitely need to increase my competence

Record the appropriate number in blank for each item.

### Challenging the Process: Confronting and Changing the Status Quo

\_\_\_ 1. Searching for opportunities to initiate change

\_\_\_ 2. Experimenting and taking risks; learning from mistakes and successes.

### Inspiring a Shared Vision: Communicating Your Hopes So That Others Understand and Accept Them as Their Own

\_\_\_ 3. Envisioning the future; having a mental image or personal agenda of a positive and desirable future state.

\_\_\_ 4. Enlisting others in that vision by communicating it in a way that attracts others and links with their goals

### Enabling Others to Act: Building Coalitions of Supporters and Collaborators

\_\_\_ 5. Fostering collaboration by getting people to work together.

\_\_\_ 6. Strengthening others by sharing power and information.

### Modeling the Way: Showing My Philosophy, Standards and Personal Values About How Employees and Customers are Treated

\_\_\_ 7. Setting the example and leading by doing.

\_\_\_ 8. Planning small wins by breaking projects into small, manageable chunks.

### Encouraging the Heart: Showing Pride and Love for People, For What They Do, For Customers

\_\_\_ 9. Recognizing contributions and linking rewards to performance.

\_\_\_ 10. Celebrating accomplishments based on key values, making public recognitions and being personally involved.

Adapted from Kouzes & Posner, The Leadership Challenge.

## **CHALLENGING CHANGE WITH A MARKETING ORIENTATION**

**Presented by:**

**W. Wayne Talarzyk, Ph.D.  
The Ohio State University**

### **A. GENERAL BUSINESS - MANAGEMENT ISSUES**

- 1. GLOBAL ECONOMY**
- 2. INCREASING COMPETITION**
- 3. ENVIRONMENTAL CONCERNS**
- 4. ETHICS**
- 5. CHANGING DEMOGRAPHICS**

### **B. IMPORTANCE OF RETURN-ON-INVESTMENT**

- 1. INCREASE VOLUME**
- 2. IMPROVE MARGINS**
- 3. CHANGE FINANCING**

### **C. GENERAL BUSINESS STRATEGIC RESPONSES**

- 1. CUSTOMER FOCUS**
- 2. MARKET SEGMENTATION**
- 3. RELATIONAL MARKETING**
- 4. "RIGHT" SIZING**
- 5. TOTAL QUALITY MANAGEMENT**
- 6. PARTNERING**
- 7. EMERGING COMMUNICATIONS TECHNOLOGIES**

**CHALLENGES OF TEACHING NEGOTIATION***Roy J. Lewicki<sup>1</sup>*

Courses in negotiation have become a growth industry. Eleven years ago, when I first taught a negotiation course to students in a graduate school of business, there were perhaps two or three other comparable courses in the United States. Reading and case materials at that time were drawn largely from labor relations, social psychology, and international diplomacy. Simulation materials were adapted from game theory, collective bargaining and psychological experiments. Only one or two practitioner-oriented trade books were available in the marketplace.

Today, many new negotiation courses are started each year in business schools, law schools, public policy schools, schools of international relations, and undergraduate curricula. Case studies and simulations are being systematically developed to analyze and enact negotiation in each of these environments and contexts. Research emphasis has largely moved from the development of new theoretical bases to applications and the analysis of negotiations in situational context. Practitioner-oriented books on negotiation abound, and comprehensive textbooks are beginning to appear. Finally, seminars for executives and practitioners are available from almost every reputable training organization and consulting firm.

Despite this dramatic proliferation of negotiation courses, seminars and resource materials, there has been little explicit discussion of how negotiation should be taught. My purpose in this article is to initiate such a discussion by exploring some of the central problems, issues and dilemmas of teaching negotiation. While some of these problems are not unique to teaching negotiation skills (and related courses in power and conflict management), others specifically arise because of the nature of the subject matter and the pedagogical style necessary to create a rich and challenging learning environment.

**How Teaching Negotiation is Different**

Some elements of teaching negotiation are very different from teaching more traditional courses. The following examples of such differences contribute both to the excitement and to some of the challenges of teaching in this field:

1. Negotiation is a relatively new course area, and, until recently, each instructor largely "reinvented the wheel" each time he/she designed a negotiation course. While this newness offers the opportunity for creativity, it also results in much idiosyncrasy in both what is taught and how it is taught. A few who were involved in the early teaching ventures learned of one another's existence and compared notes. It is only recently, however, that sets of course outlines have been available for instructors to review and compare (Neale and Northcraft, 1985).

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<sup>1</sup>Reprinted from The Negotiation Journal, January 1986, pp. 15-27.

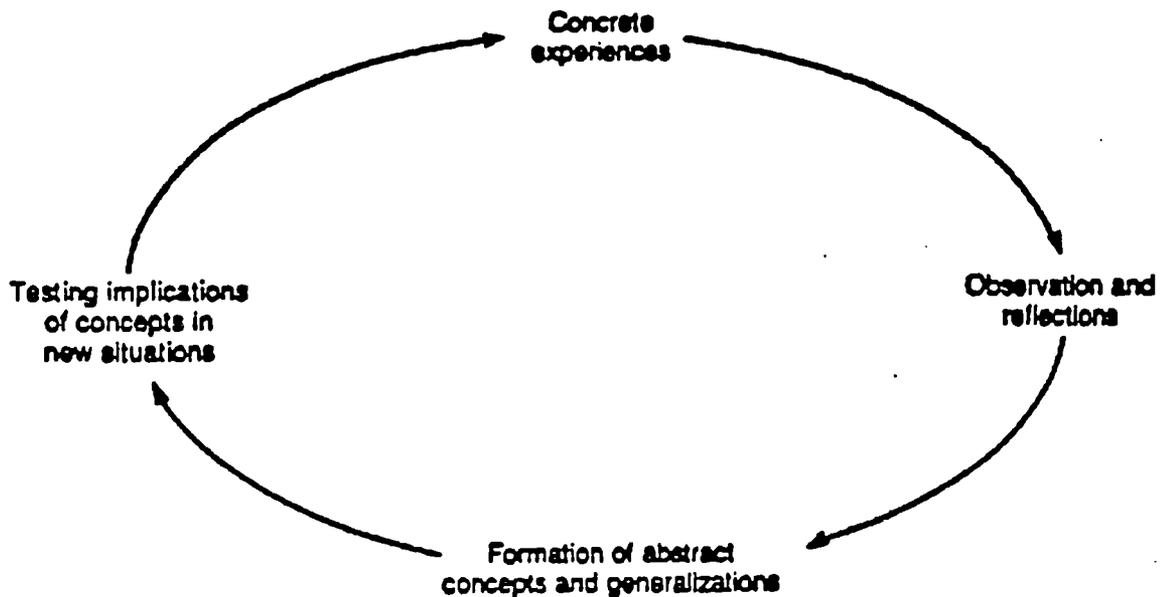
2. Because of the newness of the field and the lack of open discussion about teaching negotiation, there has been little systematic dialogue and research on how the subject should be taught. Each instructor has developed a personal teaching model based on quasi-random experimentation and intuitive judgment. These models and their implications have not been tested.
3. As noted in the introduction, the study of negotiation is truly interdisciplinary. Negotiation has been studied in a variety of different contexts, and both researchers and instructors have liberally borrowed models and theories from one context and applied them to another. Yet the appropriateness of the cross-context translation and application has seldom been tested. For example, researchers in third party dispute resolution have often noted that third parties operated in different environments and contexts, e.g., labor relations, the courts, community disputes, corporate organizations and international diplomacy. Moreover, research findings derived in one context were readily applied to another as though the contexts were identical. Yet until recently, no effort was made to test this transferability and determine how much contextual factors actually affected third party behavior and effectiveness (Lewicki, Sheppard, and Bazerman, forthcoming). The same manner of unbridled cross-field application has occurred in most of the negotiation research, and in teaching the subject.
4. While negotiation can be taught as a purely academic course (and usually is taught this way in social science departments or in a doctoral seminar), the movement in negotiation training has been toward combining skill development and intellectual training. This has occurred because the greatest demand for negotiation courses is in professional schools of business and law, where there is a stronger emphasis on pragmatic education. In addition, students enter the course with varying degrees of behavioral "expertise." While most students have not been exposed to negotiation theory and models, many have negotiated for a long time, some in a professional capacity. To the degree, then, that a negotiation course emphasizes skill development, students may have to unlearn old, unproductive behaviors as well as learn new behaviors.

#### **A Model for Teaching Negotiation Skills**

There are several key assumptions about the teaching and learning of negotiation that, though they may seem obvious, should be stated explicitly.

First, negotiation is a *comprehensible social process*. Negotiation is not a mystical process in a black box; it can be analyzed, understood, and modeled. Second, negotiation is a *learnable and teachable skill*. Negotiators are made, not born, and skills can be improved and relearned throughout life. Finally, change and improvement in negotiating behavior require a *combination of intellectual training and behavioral skill development*. Thus, the most effective approaches to teaching negotiation will integrate intellectual analysis and skill development in a complete pedagogical package.

**FIGURE 1**



To demonstrate how skill development and theory may be integrated together in teaching negotiation, I will employ a simple, broad-based model of experiential learning (Figure 1). This model, derived from the work of Kolb, Rubin and McIntyre (1983), proposes that learning occurs in four interrelated steps:

- the development (or external introduction) of concepts, principles and generalizations, leading to
- predictions, hypotheses, or testing of the implications of these new concepts, leading to
- actual behavior and concrete experiences, leading to
- observations, reactions and reflections on that behavior, leading back to further concepts, principles and generalizations (theory).

Students can begin anywhere in this cycle to change their behavior or their understanding of it. For instance, athletes who want to improve their tennis swing might begin this process by becoming more aware of their current swing (actual behavior and reflection). This then leads to an effort to define why the swing is poor (reflection and principles), followed by an intention to change the wrist position while swinging (principles and intentions), then a change in the way the racket is swung (behavior). Similarly, watching a videotape of a professional tennis player or reading a book about tennis would be an infusion of principles, leading to intentions to behave differently; actually taking a lesson would be an introduction of principles and some "practice" (new behavior, reflection, intention to behave differently, and more new behavior).

This model is useful in several ways. First, it applies to many different situations where skills are learned and developed, and allows us to break down the skill development process into its component parts. Second, since the learning model has several component parts, it is most useful to structure the learning process to bolster each of the elements. Finally, there are several competing theories as to the optimal place to "enter" this learning circle. I will note some of these competing theories in the discussion that follows.

### **Structuring The Course**

While it is possible that some doctoral-level instructors may wish to teach only theory and research, instructors at other levels generally want to structure a course that is designed to improve the student's negotiating behavior. In particular, courses designed for executives or MBA students should offer a blend of theory and skill practice, since these students are primarily interested in improving their negotiating behavior. Courses structured in this way are more likely to help the student recognize the relation between theoretical principles and actual behavior, thereby preparing the student to negotiate more effectively. Finally, experiential components add a dimension that makes the course more interesting, enjoyable, exciting, and relevant to both student and instructor.

There are many ways to structure a negotiation course—in terms of the topics covered, intellectual and experiential materials used, etc.<sup>1</sup> Since I am not proposing that there is one definitive way to teach this topic, the following ideas are intended as suggestions only. However, an ideal course structure should emphasize each of the four stages in the experiential model, and I shall make specific recommendations regarding course design elements that may be used for each stage.

*Theory and Concepts.* Most academic courses emphasize theory and scholarly research. Negotiation is no exception. There is a large volume of material available on the negotiation process, written from many different perspectives (e.g., psychology, economics, communications, sociology, law, and political science). Instructors seem to prefer all varieties of textbooks, research books and articles, or mass market publications written largely for practitioners. The following topics are addressed in most negotiation courses, through lectures or assigned readings:

- the dynamics of interpersonal and intergroup conflict;
- an overview of the negotiation process;
- the economic structure of negotiation, and some exposure to game-theoretic models;
- the basics of competitive, distributive, win-lose negotiation;
- the basics of collaborative, integrative, win-win negotiation;
- interpersonal, intragroup, and intergroup negotiation;

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<sup>1</sup>For a sample of negotiation course outlines from leading instructors, see Neale and Northcraft, 1985.

- the use of power, and negotiating in unequal power relations;
- approaches for resolving unproductive negotiations, including the use of third parties.

*Intentions/Predictions.* Intentions and predictions are ways that the negotiator translates theory and concepts into practice. Whether it be a desire to try a different strategy in negotiation, or apply a concept from the reading, students should be specifically encouraged to engage in planning and goal setting prior to negotiations. This may be accomplished in the following ways:

- requiring students to engage in a planning process prior to simulated negotiations, or to real-world experiences. Planning may include preparation of information and arguments, setting negotiation goals and objectives, predicting the opponent's objectives and personal style, and selecting a strategy to achieve the goals.
- requiring students to "experiment" with new behaviors. Instructors often make a point to encourage students to simply try out different negotiating styles and approaches. Students may be encouraged to try more cooperative or competitive behavior, be more or less talkative, or assume positions of power contrary to their normal experience. The assumption is that the class provides a "safe" environment in which to try new behavior and gain feedback from others, but without endangering the substance of an agreement or the long-term relationship between the parties that is at stake in real negotiations.

Students may also be specifically encouraged to practice the prescribed behaviors of a particular model, such as different ways to achieve integrative agreements (Pruitt, 1983) or different ways to act as a third party in resolving a dispute (Sheppard, 1984; Brett, 1983). Finally, students might learn new behaviors by imitating a model who negotiates "correctly" (according to some prescriptive theory or framework). This process is analogous to watching the tennis pro's technique with a backhand swing, or watching a videotape, and then trying it yourself. While behavioral modeling has been used a great deal as a way to master complex skills, remarkably little if any training in negotiation has used either live or videotape models as a way to teach negotiation skills.

*Actual Behavior.* The primary vehicle for introducing actual negotiating behavior in class is through role playing and simulations. Some instructors use role plays and simulations at the beginning of a course, to acquaint students with the behavioral dynamics before the conceptual material is addressed; others use them in the middle or later parts of the course, to illustrate key principles or demonstrate the complexity of a large intergroup negotiation; still others use them throughout the course, beginning with simple scenarios (games and one issue negotiations), and building toward more complex negotiations as the course progresses.

At this time, while there is a great deal of case material available, it is not centralized in any one location. Much can be derived from books of resource materials (e.g., Lewicki and Litterer, 1985), commercially distributed scenarios (e.g., Bass, Bass and Shapira, 1982), dispute resolution organizations (e.g., American Arbitration Association or National Institute for Dispute Resolution—Brett et al., 1985) or case clearinghouses (Program on Negotiation Case Clearinghouse or Harvard Business School Case Services). New materials with a wide variety of applications are constantly being developed and are usually shared among instructors teaching in this field.

Role plays and simulations may be conducted during class time, or they may be set up at the end of a class, to be completed by the students on their own. I suggest instructors use several of each kind. In-class activities allow the instructor to describe the simulation and instructions clearly, monitor student behavior closely, and debrief events "on the spot." However, simulation effectiveness may be constrained if the classroom facility does not have sufficient "break out" space for groups to meet and work independently, or if the allotted time is inadequate. In contrast, simulations apart from classes allow students to prepare at their leisure, control (and manipulate) the time and place of negotiation, meet as often as is necessary, use breaks and recesses strategically, etc. A twenty-minute in-class simulation between very competitive students may consume three or four hours outside of class.

*Grading.* Several instructors have experimented with grading students on their negotiating behavior. Some use simulations that allow various settlement packages to be scored with point schemes (e.g., Edwards and White, 1977), and assign grades based on the number of points won. With other simulations, grades can be determined on the basis of who negotiated the better package for each party in the dispute, or who invented the most integrative solutions. Unfortunately, there appear to be very few efforts to evaluate students on the effectiveness of their behavior rather than on outcomes.

Grading on the basis of actual negotiating outcomes is viewed as realistic by some students, particularly those who already negotiate well, but as troublesome by those who expect to have their performance judged by more traditional academic methods.

*Reaction and Reflection.* Negotiation instructors who use simulations must also devote ample class time to "debriefing" students about these experiences. There are several objectives for the debriefing process:

- to compare and evaluate the different outcomes achieved by different subgroups;
- to compare and evaluate the different planning and strategizing processes that led to these outcomes;
- to help students compare and evaluate the differences between their intended actions and what may have actually occurred;
- to use the simulation to highlight key conceptual and theoretical points;
- to create the opportunity for students to note deficiencies in their own behavior, or the negotiation process, and to define—implicitly or explicitly—new or different ways to behave.

There are many ways to achieve the reaction and reflection objectives through course structure and design. First, students may discuss the simulation after it has occurred, or they may complete some form of standard "debriefing" questionnaire. Second, simulations may be videotaped, and students may be asked to watch and critique their behavior. Third, students may be asked to prepare a formal written analysis of the simulation, applying theories and concepts to the situation or setting explicit goals for future behavior. Instructors frequently use these application papers or journals to encourage students to monitor their own behavior and apply theory as appropriate. Finally, students may also be required to complete a comprehensive assessment of their own "negotiating style." Data for this assessment can be generated from reflection

on their behavior in the simulations, feedback from other students, and by completing one or more personality self-assessment questionnaires on dimensions related to negotiation—such as conflict management style, assertiveness, ethics, etc.

Negotiation case studies are another major learning vehicle in the reaction and reflection phase. Cases expose students to the negotiating behavior of others, encouraging examination of behavior in the context in which it occurs. Theories, concepts and models are also provided to enrich intellectual comprehension. Cases are discussed in class or may be given as examinations to test successful analysis and application of theory. Films and videotapes are also good case material, allowing students the opportunity to observe nonverbal behavior and strategic nuances as well as negotiation techniques. Unfortunately, few if any quality case-oriented films and videotapes are available for instructional use.

*Differences Among Learning Populations.* Whether the instructional module is two hours, one day, three days or an entire semester, the instructional design should include all four elements of the experiential learning model. This cycle may be completed once in a short program, or multiple times in a longer program or course. Measurement may be formal, as in graded examinations and papers, or informal, as by simply noting behavior. Moreover, students should be encouraged to continue to keep a personal journal to monitor their negotiating behavior and compare goals set prior to actual negotiations with the results of the process. As in any skill development program, consistent monitoring and practice of new and different behavior is more likely to lead to behavior change and enhanced effectiveness.

In addition, different student populations should probably receive varying exposure to different components of the learning module. As noted elsewhere (Lewicki, 1979), university students are more comfortable with theory and abstraction, and more able to work with conceptual models that may not have ready application. In contrast, executives and practitioners are generally immersed in the behavioral dynamics of the process, but are less facile with complex theoretical abstractions. Instructors working with these latter groups will find it more useful to limit conceptual input to "friendly theories": those that are less abstract, or immediately tied to in-class simulations or examples the audience can appreciate. Educational programs for these groups should spend more time on simulations, case analyses, or elaborate, relevant examples and less time on "raw" theory and models.

### Unique Problems in Teaching Negotiation

I believe that teaching negotiation and conflict management creates several unique challenges and problems that instructors do not typically encounter in other courses. I will now describe some of these challenges.

1. *The Volatility and Unpredictability of Classroom Dynamics.* Most negotiation instructors are intellectually aware of the dynamics of conflict. Competitiveness and conflict lead to heightened emotions, distortion of perception and judgment, misattribution of the causes of behavior, heightened cohesiveness in one's own group, and the enhanced likelihood of behaving unproductively and unethically. However, it is one thing to understand these dynamics intellectually and recognize them in others, and another to experience and manage them.

Because of these dynamics, courses in conflict, power, and negotiation often energize and motivate students, making classes exciting. Events occur that students remember long after the course is over and

the intellectual content is forgotten. There is, however, a negative side to these dynamics: students will often be angry at one another, and sometimes at the instructor. They will say things they don't mean, and do things for which they do not understand the consequences. They will get carried away by the moment, yet be surprised or even remorseful later.

The instructor, who cannot run away from such situations, must be comfortable around others who are in conflict. Sometimes an instructor is unwittingly entrapped in these dynamics, becoming "part of the problem" rather than an uninvolved observer. Because classroom events are not always predictable and plannable, an instructor of a course dealing with negotiation and conflict management should be prepared to address, manage, and integrate spontaneous classroom events with the learning objectives of the course.

**2. Multiple Instructor Roles.** In a traditional academic course, the instructor has clear-cut role responsibilities: to structure a coherent course outline, lecture, facilitate discussion, and evaluate student performance. However, by virtue of the variety of educational experiences described earlier, as well as the unpredictability of conflict dynamics, instructors in negotiation courses are placed in multiple (and often conflicting) roles. Instructors must continue to act as formal educators, but also have enhanced responsibilities as classroom managers, referees, mediators and counselors. While these roles and accompanying responsibilities may appear to be distinct and explicit, in practice they are frequently vague or in direct conflict. Following are some guidelines for each role:

*Educator/Evaluator.* The instructor's responsibilities are, as just outlined, to structure the course, to be an expert in the conceptual foundations of conflict and negotiation, to convey that expertise through lectures or readings, to facilitate classroom discussion, and to evaluate student learning and performance.

*Classroom Manager.* The instructor's job is to orchestrate the learning experience. Role plays need to be planned with regard to preparation and distribution of materials, securing adequate facilities, time scheduling, and organizing students into groups. Before an exercise is concluded, students should discuss the exercise and abstract key points. Simulations are useless activities without this analysis. Finally, applications should be drawn to the major conceptual points.

*Regulator/Referee.* The instructor's responsibilities are to define the boundaries for appropriate and inappropriate behavior in the classroom and in simulations. The instructor will frequently become the policeman, prosecutor, judge and jury in setting and enforcing rules. Some of those rules are academic, while others are procedural and relate to the simulations. The instructor must decide which rules to make, how to enforce them, and what to do when they are broken.

*Mediator/Counselor.* Finally, as noted earlier, students often become angry and entrapped in the conflict dynamics. Negotiations may have deadlocked, or ended in betrayal. Yet for the educational process to proceed, students must be able to detach themselves sufficiently to assess events and behavior and move on to other activities. The instructor's job is to help the class achieve this balance, and frequently requires intervention as a mediator or counselor.

Role conflict for the instructor *consistently* occurs among these various role responsibilities. These conflicts arise when student and instructor disagree on the appropriate role to be taken, or when an instructor must assume several different roles and each prescribes a different behavior. Management of

these conflicts can significantly enhance or detract from the instructor's enjoyment of a course, student learning in a course, and student satisfaction with the course. Examples of such conflict are:

- Students try to anticipate the instructor's implicit models for effective negotiating behavior. As a result, they are afraid to be spontaneous, take risks or try new behaviors because they believe the instructor will use grades to punish them (conflict between the Evaluator and Educator roles).
- Instructors must decide whether to allow students to behave destructively, and to discover the consequences for themselves, as opposed to stopping that behavior and depriving the student of the learning experience. Similarly, instructors must decide when to stop a simulation to curtail escalating conflict (Educator and Referee roles).
- Instructors often require students to analyze their behavior through self-assessment papers and journals. Some of the least experienced and most destructive student negotiators are blind to their own behavior and the consequences it has for others. Instructors need to critique this behavior in their feedback on the paper, yet the student must believe that the academic grade awarded on the papers reflects the quality of analysis, not the behavior itself. In short, academic assessments must be seen as independent of judgments about the effectiveness of negotiating behavior (Evaluator and Counselor role).

*Resolution of Instructor Role Conflict.* The examples just noted are only a few of the role conflicts the instructor will experience. Each conflict offers the instructor a dilemma and a "choice point" for effective course management. Based on my experience, there are several key principles that may be used to guide the instructor's resolution of these choice dilemmas:

- Be explicit with students about the instructor's multiple role responsibilities, and the inevitability of role conflict—whether real or perceived. These possible role conflicts should be discussed on the first day of class, when students may hear the problem but not understand it. They may then be repeated as the need arises in the course.
- Be explicit with students in advance about the formal criteria for grading in the course, and how the criteria will be applied. This is a principle of good teaching in any classroom, but it is even more critical in a negotiation course. Explicit and independent criteria help students believe that the grading process is independent of their behavior or an instructor's "whimsical judgment."
- Be clear that students should do as they please, but that they are responsible for the consequences of their behavior. In a course that requires extensive role playing and simulation, students frequently use instructors as a target for both dependence and counterdependence. These projections help to confound the instructor roles. For example, on the one hand, students fear that if they "misbehave" in a simulation (e.g., act exploitatively or unethically), their grade will be affected. So they act inhibited, or ask the instructor's "permission" to behave in ways they ordinarily would not. On the other hand, students also believe that the instructor will stop, control or regulate undesirable behavior; hence they behave more competitively or outrageously than they might otherwise. The instructor should make it clear that students not only make their own choices about their behavior, but also must live with the consequences of that behavior. If they

choose to behave competitively or unethically and engender anger or mistrust among their classmates, these are realistic consequences that cannot be avoided.

**3. *Regulating Classroom Dynamics.*** There are a number of other procedural rules that are necessary and useful for instructors to stipulate, such as the following:

- All behavior, including behavior in simulations and role plays, is "real." Students sometimes try to argue (usually *ex post facto*) that role playing and simulations are not "real" because there are no actual outcomes and people play artificial roles. These arguments are often used to avoid taking responsibility for their behavior or its consequences, or to deny the impact of that behavior on others. Moreover, they argue that they certainly would have behaved differently had this been a "real" situation. Instructors will recognize this behavior as defensive and myopic, yet often feel frustrated in their inability to persuade the student that this is a limited and perhaps distorted view. Instead of becoming entangled in such arguments, it is usually easier to have students accept the initial premise that all behavior in the course is "real", that they make choices about the way they behave, that behavior has consequences and they must be willing to live with them. The stakes may be different outside the classroom, but the behavior is no less real.
- It is imperative that the confidential information provided in most role playing scenarios will in fact be treated as confidential. Instructors should routinely insist that students not read the opposite side's information, or excuse themselves from the exercise if they are aware of the other side's confidential information.
- Small groups negotiating within the context of a larger course should view behavior as independent and autonomous from other small groups. This is an extension of the previous procedural rule on confidentiality, but applies to discussing the role play with other students in the course before they have completed the exercise. Gaining confidential information from other groups that may have already completed negotiations, etc. will be viewed in the same light as reviewing the other side's confidential briefing documents.
- The behavior of individuals and groups within the boundaries of the course should be held in strict confidence. Courses in negotiation typically occur within a larger academic context, in which students may know one another very well. Behavioral dynamics in the course may frequently become the subject of discussion and gossip outside the course, perhaps embarrassing students who are not proud of their behavior. Students should be encouraged to respect the rights of others and to refrain from out-of-class discussions.

**4. *Unethical Conduct.*** Violations of confidentiality are only one form of ethical violation. Students may "bluff" about their position, or tell an outright lie. They may spy on another's planning session, or steal the other's documents. They may try to bribe or influence a referee. Instructors should treat these events as important dynamics that need review and attention. Moreover, while instructors frequently set aside one or more classes to discuss ethics specifically, I believe that the best discussions occur "on the spot," as perceived ethical violations occur and are challenged. I suggest the following strategies for discussing ethical issues:

- Make note of the issues raised and bring them up in the debriefing of an activity (particularly if students do not raise them);
- Do not take a normative position as the instructor. Instead, work to elicit the perceptions and perspectives of the actor, those affected by the action, and observers;
- Use the discussion to develop an agreement on the implied ethical "rule" that may have been violated (e.g., "Lying is bad"). Test out whether everyone agrees that this is the rule, whether the rule applies in this case, and whether the rule has been actually violated. The odds are that the class will not be unanimous on this point.
- Use the rule and its perceived violation to highlight how people disagree about the rules that govern competitive social behavior. Also, point out how the distorted perceptions that accompany conflict enhance the debate about perceived ethical violations and their appropriateness.

5. *Extreme Emotionalism, Revenge and Violence.* Students, and even experienced instructors laugh nervously when this is mentioned. However, "truth in packaging" requires that I admit that occasional episodes of extreme emotion, revenge and violence do occur.

Students don't believe that anyone would ever get that upset over a "silly" simulation; many inexperienced instructors don't believe it either. Yet people become very upset when betrayed, duped or ignored. Heated words and accusations can lead to long-standing feuds, revenge, and even physical confrontation. The following steps are recommended to prepare for this possibility:

- A "no violence" rule should be announced at the beginning of the course. Students may laugh it off, but the point should be made clear.
- Instructors should instantly terminate a simulation or role play when passions become extreme. Announce that the exercise is over, separate the parties, allow individuals to calm down, and/or call a break. When passions cool, reconvene that group and have people come to grips with what occurred. I strongly recommend that students be encouraged to "ventilate" by talking about how they feel, but not by hurling accusations at the other side and resuming the fight. I decidedly do not recommend that the instructor dismiss the class and ask people to "cool off and come back next week." This only allows students to continue the dispute outside the classroom, and to protract the feud in the broader academic culture by spreading rumors, building alliances, and allowing the feud to surface in other courses.

6. *Negotiating Rules and Procedures With Students.* There are usually one or more students who will attempt to use the substantive topics of the course as a rationale for testing the instructor. If, as the instructor may maintain, many things in the world are negotiable, then why not the course requirements, rules and procedures? These students will either explicitly attempt to renegotiate the rules—due dates, content of assignments, exemption from assignments—or defy the rules and then attempt to negotiate the consequences. Other students will explicitly state that the best way to evaluate students in the course is by grading their negotiating effectiveness with other students or with the instructor. Finally, others will attempt to renegotiate grades and evaluations.

Some instructors are comfortable simply saying "no" to these students, enforcing the preset rules and procedures. Others are torn by the compelling persuasiveness of the arguments, or perhaps their desire to reward the innovative and enterprising student who creatively challenges the system. Once again, there are no hard and fast answers, but my recommendation is to stick with the explicit rules.

The fairness and equity of the grading system is at stake in this discussion. If the instructor plans to evaluate academic performance based on examinations or papers, then students believe this system will be consistently applied to all. If some students can successfully renegotiate their academic obligations with an instructor, the instructor's fairness is called into question. An instructor cannot reward such entrepreneurial initiative by one student without conveying the impression that the rules are not systematically and uniformly applied. Such negative perceptions are ultimately detrimental to an instructor's evaluation and adjudged effectiveness by the class majority. The instructor will lose credibility and respect in the eyes of the students.

### **Future Agenda**

In this article, I have attempted to review the status of knowledge about the teaching of negotiation. As I have pointed out, while academic courses and seminars on negotiation have grown dramatically in the past few years, little has been written about the process, and even less research has been done. Instead, each instructor has developed an individual approach to the topic.

My hope is that this article will stimulate further dialogue on the subject. Given the importance of negotiation skills to professionals in all fields, and the accelerating growth of negotiation courses within professional schools, closer attention should be paid to the pedagogical styles and tools that are used to teach this subject. I hope that commentary will be received not only from other academicians, but from practitioners who negotiate every day. This discussion can only help to improve the effectiveness of teaching negotiation skills.

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## STRUCTURING THE NEGOTIATION COURSE

In talking with many instructors about the ways that they design and teach courses in negotiation, we know that there are as many different course designs as there are instructors! As a result, we only offer here some general guidelines to instructors about the factors which should be taken into consideration in designing and structuring a course. Many of these guidelines and suggestions were identified in the previous Negotiation Journal article; we will briefly review them here.

1. Class Size. Instructors differ on their ability to manage various groups in experiential learning activities. Good experiential learning requires a classroom of moderate size--i.e. big enough to conduct multiple role plays that will produce different results, small enough to orchestrate the experience in a limited time. We recommend a minimum class size of 12-16, and a maximum class size of 36-40. However, some of us have taught these activities to groups of 60 or more. In these settings, tight orchestration of activities is a must!

2. Facilities. Role playing with multiple teams negotiating simultaneously requires that each team have a room or place to meet, and that additional space is available for one or both teams to caucus. Thus, it is most desirable to have several break-out rooms available near the classroom for negotiation and caucusing. It will be almost impossible to conduct this class in a fixed-seat auditorium with no options for break-out space. Some instructors prefer to teach this course at night when they can have access to lots of empty classrooms that are full during the daytime. Others assign role plays to be done outside of class. If in any doubt, move the class to a place where extra rooms or flexible seating are available.

3. Class hours. It is also extremely difficult to teach this class in a number of short class periods. 50-60 minute classes do not allow students to prepare for and carry out an exercise; spanning some of them over two days takes the "life" out of them. We recommend that you schedule this class for AT LEAST 75 minutes. Longer class times are generally preferred (90-100 minutes), and some instructors even prefer one 3-4 hour class period once a week. While the fatigue factor is high, the longer class allows for maximum flexibility in carrying out role plays, discussing them, and integrating them with conceptual material.

4. Sequencing of Content. This is a matter of choice among instructors. The issue boils down to one question: is it more advantageous for students to read theory and hear lectures about a topic (e.g. integrative bargaining) before experiencing it in a role play, or is it better to do the role play first? Instructors differ on this question, and we suggest that you experiment with both formats.

5. Assignments Evaluation and Grading. Instructors have used a variety of different learning vehicles in courses on negotiation. We make the following suggestions:

a. Examinations. We recommend essay or case-analysis examinations. Essay exams may be used to test understanding and application of concepts presented in the text and in class. Case-analysis examinations should assess the negotiation and conflict dynamics of a selected case, and perhaps application of

theories and approaches. We do not recommend short answer, multiple choice examinations.

b. Term papers. We have frequently given students a number of options for a term paper assignment:

\* researching and analyzing a negotiation as reported in the media--e.g. a labor-management dispute, disarmament talks, international negotiations, major business deals, etc. There is an unlimited number of topics to be taken from history, politics, labor relations, business and international affairs.

\* researching and analyzing a negotiator--e.g. Kissinger, a labor leader, or someone the student can get information on. Actual interviews with car dealers, real estate salesmen, insurance adjusters, etc. often provide interesting experiences.

\* preparing a paper that summarizes a stream of research in one of the many areas of negotiation--e.g. the effectiveness of threats, face saving, strategies of deterrence, effectiveness of third parties, etc. Topics can be generated from the research-oriented textbooks and journals.

\* writing a "personal case," based on a student's own negotiating experience. Students should write a case that describes their experience, and then analyze that case. Because students are frequently still "myopic" about their own effectiveness or ineffectiveness as negotiators, we frequently encourage students not to select this option unless they can get someone's view other than their own about the events and how they transpired.

\* actually negotiating for something of personal value, and then writing a paper on it. Instead of describing a past experience, students can also be asked to plan and execute an actual negotiation during the span of the course, and then write a paper on it. The paper can entail the actual planning for the negotiation, the execution of the negotiation, report of results, post-hoc interviews and analysis, integrating theory, models, etc. Students have done some wonderful projects: negotiating a grade change with a faculty member, resolving a conflict with a roommate, parent, spouse or friend, negotiating a new job assignment, salary or working conditions with an employer, buying automobiles, furniture and sporting goods, etc.

\* writing a role play. Finally, students may combine personal negotiating experience with historical research to write a role play scenario rather than a case or description. These role plays can be tried in the classroom and used in future classes.

c. Personal Application Papers or Diary. These assignments encourage students to reflect upon a simulation or role play, and to abstract the key learning points out of that event. We generally either require students to keep a weekly journal that is periodically collected and reviewed, or assign 4-5 application papers in a term. Here is a sample from one of our course outlines:

"The purpose of the paper is to encourage a reflection and analysis process on the 'learning by experience' simulations; the paper also gives the instructor a sense of your individual progress, and your strengths and weaknesses as a negotiator. Your task in this paper is to describe your reactions, perceptions, impressions or significant insights gained from participation in or

reflection on the simulation. You may talk about yourself, or the behavior of other people, and may want to address some or all of the following points:

1. Briefly, what happened in the simulation, role play (or 'real-life negotiation')--that is, provide a brief overview of the key events.
2. What did you learn about yourself from this experience?
3. What did you learn about the behavior of others from this experience?
4. How does this experience compare to others that you have had in similar or comparable circumstances?
5. What did you learn about bargaining or conflict from this situation?
6. How do the concepts in lectures or readings enrich your understanding of the process of negotiation, its outcome or your own 'style'?
7. What would you do the same or do differently in the future, or how would you like to behave in order to perform more effectively?

Each paper will be read, commented on, 'graded,' and returned to you. The purpose of the grades is to encourage thoughtful analysis and understandings of the simulations, and to encourage use of theory and research presented in readings, and lectures. A 'good' short paper is one which tries to step back from a simulated bargaining situation, identifies key events and processes, uses readings or lecture material to help structure the analysis, and is well written. All of these guidelines are just that--guidelines. Outstanding papers have frequently been written in the past that do not closely conform to this format."

Whether the short papers are used or not, students may also be asked to write a "summary" self-evaluation paper at the end of the course. These papers are usually 5-8 pages in length, and ask students to address the following points:

1. Do I enjoy bargaining? Do I enjoy being in situations of conflict, and/or do I enjoy attempting to persuade others to my point of view? Why?
2. Do others see me as a "good bargainer?" Am I seen as strong or weak? Am I perceived as one who gives in easily, or holds out too long, or knows when to make conciliations and tradeoffs?
3. How do I see myself in relation to the question in (2) above?
4. How effective am I at persuading others? How effective are my verbal skills to argue my points?
5. At what time do I feel most competent in bargaining? Least competent?
6. How do I respond when I hold the power in a situation? How do I respond when I have little or no power in a situation?

7. Overall, what are my major strengths and weaknesses as a negotiator, and what kind of learning goals must I set for myself for the future?

We have had good experience with personal learning papers and journals, and summary papers on personal learning and development. Many students like them--but some don't, and it shows in the amount of time and effort they give to the activity. Two cautionary notes about using diaries, journals and learning summaries:

\* they are time consuming to read. Evaluation for each student takes significantly longer than grading an exam. In addition, individual feedback to students--written or verbal--is also very time consuming.

\* "grading" and evaluation of journals, by necessity, becomes a reasonably subjective process. As a result, while the instructor will be able to discriminate differences in the conscientiousness paid by the student to the journal writing task, the detailed nature of entries, and level of student insight and personal learning that may be occurring, it may be very difficult to explain and justify such differences (and the related grade) to students. If you, and/or your students, have a strong need for "objectivity" in grading, using journals can create a problem.

d. Graded negotiation. Lastly, we have often graded students on the outcomes of several negotiations. One clear consequence of this practice is that it raises the competitiveness of the simulations considerably; but it also forces students to evaluate their positions carefully and take the process seriously. An example of one format for using graded negotiations is as follows:

"Graded Negotiations". Three role plays will be conducted outside of class. By virtue of a point scheme assigned to particular variations in settlements, negotiators will be evaluated on the settlements they achieve. The procedure will basically operate as follows:

1. Roles will be assigned and the negotiations explained at the end of a particular class period. Students will be assigned to one or two person teams, and opponents specified.

2. Students will have an entire week to arrange a negotiation with their opponent and arrive at a settlement.

3. Results of negotiation are due in writing to the instructor by a specified deadline. Failure to meet the deadline will result in a penalty.

4. Teams will be assigned grade-points based on the quality of their solution as compared to all other teams playing that same position.

5. All members of a team will be assigned the same grade points for the exercise unless appealed to the instructor. Appeals must be specified in writing no later than 24 hours after the negotiation results are submitted.

There will be three role plays, and they are weighted in their contribution to the final grade. Role Plays 1 and 2 will be worth x% apiece, and Role Play #3 will be worth y%."

If an instructor is going to use graded negotiations, we suggest the following rules of thumb:

- \* graded negotiations should comprise no more than 1/3 of the total course grade.

- \* there should be several graded negotiations.

- \* agreements arrived at by the students should be submitted to you in their handwriting, and signed by both sides, so that there is no disagreement as to what was agreed to.

- \* in purely distributive negotiations, students receiving the best package on each side should be given the best grades. Thus, in a buyer-seller negotiation, the best buyer outcome and the best seller outcome get the top grade, and others are graded relative to the top in each group.

- \* in simulations which emphasize integrative negotiations, students should be graded based on the best cooperative, innovative joint agreement that is derived. Student judges may be used as an aid to determine what are the "best" solutions. STUDENTS SHOULD BE TOLD WHETHER THEY WILL HAVE A NEGOTIATION GRADED BY DISTRIBUTIVE OR INTEGRATIVE CRITERIA.

- \* unless you set up explicit criteria to do so, students should not be judged on their behavior in the negotiations, but on the results they achieve. If you think you are able to judge "better" or "worse" negotiator performance, we would be pleased to learn of the scheme you develop or use to do this.

- \* in evaluating negotiation outcomes and assigning grades--particularly integrative negotiations--we have frequently been challenged by students as to the validity of our evaluation criteria. Be prepared to defend the criteria you use if you employ this method. We have also found it helpful to delegate a small group of students to be an "appeals panel" for hearing grade grievances on graded negotiations, and/or to develop the criteria for evaluating the results of each scenario. Thus, for example, a small group of students could be asked not to do the role play, but instead to develop the criteria by which others' solutions will be judged.

- \* we have recently experimented with combining the graded negotiation and an analysis paper on the negotiation. Thus, part of the grade is assigned based on the actual outcome achieved in the graded role play, while another part of the grade is based on the quality of an analysis paper on the event. This combines two types of assignments into one, and creates the opportunity for students with good negotiating skills but poor writing/analysis skills (and vice versa) to perform well.

In summary, grading negotiations can be a creative alternative to reading papers and correcting exams. However, the more competitive the classroom environment, the more the instructor may become enmeshed in numerous "grading hassles" with students about criteria used, how good their solutions were, etc. Be prepared for this as a logical offshoot of any efforts to grade students on their performance. Take appeals only in writing, and consider them when you are not under direct pressure from a student's own persuasive negotiating ability.

## Additional Resource Materials

The following sources may be consulted for additional resource materials that can be used in teaching this course:

1. Sample Course Outlines. See Neale, M. and Northcraft, G. *Bargaining and Dispute Resolution Curricula: A Sourcebook*. Durham, N.C.: Eno River Press, 1985.

### 2. Role Play Materials.

a. Contact the National Institute for Dispute Resolution, 1901 L Street N.W., Suite 600, Washington, D.C. 20036 for their complete catalogue of books, videotapes, articles, etc. on dispute resolution in the public and private sectors. Two slightly dated but excellent volumes of role plays and comprehensive teaching notes are two volumes of *The Manager as Negotiator and Dispute Resolver*, one for O.B. and Management courses by J. Brett, L. Greenhalgh, D. Kolb, R. Lewicki and B. Sheppard, and the other for Economics and Decision Analysis courses by D. Lax, W. Samuelson, J. Sebenius, R. Weber and T. Weeks.

b. Contact the Clearinghouse at the Harvard Negotiation Program (Harvard Law School, 500 Pound Hall, Cambridge, Mass 02138) for their catalogue of role play and videotape materials (as of July, 1992, a revised catalogue is in preparation). These are not free, but sample copies may be purchased as well as copies for an academic course. One resource is by L. Susskind and E. Babbitt, *Resolving Public Disputes*, 1987, containing the teaching notes on 11 public sector negotiation role plays. *The Negotiation Journal*, also published by the Harvard Negotiation Project and Plenum Press, often features articles on negotiation pedagogy, and reviews leading text and resource books in the field.

c. Contact the Dispute Resolution Research Center at the Kellogg Graduate School of Management, Northwestern University, Evanston, IL. (708-491-8068) for their compendium, *Materials for Teaching Negotiation and Dispute Resolution*, edited by Jeanne Brett. The paperbound volume contains many excellent role play scenarios, most of which are "scoreable" so as to be able to calculate and rank order outcomes more precisely. The Northwestern Center also has an excellent reprint series of research articles on negotiation.

### 3. Videotapes.

To our knowledge, there are very few videotapes on actual negotiations that are publicly available. The National Institute for Dispute Resolution has a few videotapes available. The videotape that accompanies the Detection Technologies role play (Exercise 18) may be particularly useful. The American Arbitration Association has some excellent videotapes available for teaching about arbitration and mediation. Contact the AAA. Finally, the Harvard Program has produced several videotapes as well. Please contact us if you know about others.

## Feedback to the Authors

We hope the materials in these volumes serve you well. We would be pleased to receive any feedback, suggestions and corrections that you have, or to answer any questions that come up as you use these materials. Please don't hesitate to contact us, and let us know how these materials work in your own organization or university.

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## OVERVIEW OF INSTRUCTOR'S MANUAL

In the remaining sections of this manual, you will find the following resource materials:

1. Special Guidelines for instructors who have not frequently used role playing or instruments in the classroom as pedagogical tools.
2. A matrix that evaluates each of the role plays, questionnaires and cases relative to their "fit" with particular sections of the readings in the Readings volume, and with textbook chapters.
3. Individual teaching notes on each of the eighteen exercises, four instruments and four cases.

## SPECIAL GUIDELINES FOR USING ROLE PLAYING AND INSTRUMENTS

The following guidelines will be useful to instructors who have not had extensive experience with role playing activities, or have not used self diagnostic questionnaires and personality scales in the classroom.

### Special Guidelines for Using Role Playing<sup>1</sup>

Role playing is probably one of the oldest (comparatively speaking) techniques for making behavioral science materials "come alive" in the classroom. The advantages are well known and have been spelled out more fully in a variety of sources (Miles, 1959; Thelen, 1964; Maier, 1965, 1975). We will only briefly list them here:

1. Role playing provides a "real world" context for exploring behavioral principles, as opposed to discussing them as abstract theory or as principles devoid of the organizational nitty-gritty.
2. It allows for spontaneity and involvement in the material, and requires more of a personal commitment from the student than reading and discussing a case.
3. It permits the examination of behavior, as opposed to theoretical analysis or speculation. What people actually do is, of course, often quite different from what they say they would do or others should do. Role playing enables us to look at what people actually do.
4. At the same time, it gives people the opportunity to experiment with new ways of behaving without necessarily facing the real-world consequences of that experimentation.
5. Finally, the involvement bred by role playing increases diagnostic skills for understanding the nature of the situation, the complexity of human behavior (as opposed to being able to articulate "simple common sense"), and to test out possible solutions.

The role-playing scenarios in this book specify times, description of the roles, and discussion. However, many other behavioral science cases can easily be adapted for role-playing use in the classroom. We offer the following guidelines for using a role-playing activity:

1. Plan how you are going to use it. Consider the use of the role play in the broad context of both the content and other learning devices to be used.
2. Decide whether you are going to preselect people for certain roles from the class, involve the class in this "casting" process, or merely ask for volunteers. There are usually good reasons for doing your casting in a particular way. You may want to select certain "types" of people to play certain "types" of roles -- you ought to share these criteria with the case after the

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<sup>1</sup>Reprinted from Instructors Manual to Accompany Experiences in Management and Organizational Behavior, 2nd Edition. New York: John Wiley and Sons, 1982. Used with permission.

exercise. On the other hand, you may want to have the class help you select people, you may want to select at random, or you may want to select individuals who make significant points in a case discussion.

3. Decide whether you want to "replicate" the role playing by having everyone take on a role and conducting a number of role plays simultaneously, or use the role play as a demonstration in front of the class. While the former breeds the greatest degree of involvement, the latter is more common, gives you more control over the learning process, and allows for other options.

4. Allow warm-up time for the role players. Make sure they understand their own role and what expectations are placed on them by the scenario they will enact. (Often, however, you may want to ask individuals to play a role impromptu, as they are discussing a case.)

5. Decide whether you want to share knowledge of what the other role players will be presenting, or whether each role player should see only his own "script." This latter alternative is usually used when the nature of the role play deals with people's hidden thoughts, feelings, or attitudes, or when people are in competition or conflict with one another.

6. Know when you want to "cut"; --at your own discretion, or fix the time limits and adhere to them.

Alternative uses of role playing are becoming more common, supplementing the technology of videotape. Here are some ideas:

1. Interrupt a role play and allow people to step out-of-role and discuss what they have been doing--then return to the action.

2. Interrupt a role play and use other members of the class as "consultants." Each role player meets with his consultants before he returns to continue the role play.

3. Complete a role play, videotaping the entire sequence. After some discussion of the role play, introduction of theory or concepts, etc., replay the videotape, stopping it at critical points. The initial action can often be done before class.

4. Interrupt a role play and let other members of the class substitute for one or more of the role players, then continue the action. This technique might be used when you want to explore different ways of handling a problem (e.g., role playing a supervisor managing a difficult motivation situation with employees).

5. Try "instant replay" with live action or videotape. After stopping a role play and critiquing it, repeat the same scene with the same (or different) actors. This is often a very useful process when asking people to master specific skills (e.g., giving feedback, listening, interviewing, etc.).

6. Experiment with "alter-ego" a variation on the "substitute" principle. People in the audience can act as a particular role player's alter-ego, saying what they think the role player is thinking or feeling but not verbalizing. This is often a good way to get feelings and thoughts on the table that would otherwise go unspoken.

Finally, you should plan for a thorough discussion of the role play--the people, the types of behavior shown, and the important concepts. Don't forget to explore how "easy" or "difficult" it was for people to play particular roles, or to "get in" and "get out" of a role. This is usually important information, and often relates to the subject matter of the role play and the learning environment in the classroom.

### Special Guidelines for Using Instruments

There are several activities in EMOB that use psychological tests or questionnaires--"Analysis of Personal Power" (no. 32), "Organizational Climate Questionnaire" (no. 41), etc. A number of others are commonly available to measure personality, motivation and leadership. There are a number of advantages to using instruments in teaching organizational behavior:

1. They are a simple way to teach concepts and theory, since the participant must respond to questions that measure the attitudes or behavior relevant to that theory.
2. They produce involvement and interest in the theory as it personally applies to the participants, rather than as abstractions.
3. They provide useful information for the participant about himself that he can integrate with other aspects of his self-image.
4. Similarly, they provide information that helps the participant distinguish himself from others in the immediate environment, as well as from commonly established norms, information that can be confirmed by other kinds of attitudinal and behavioral data.
5. When administered more than once over time, they help to measure the degree and direction of change.

Instructors often experience certain disadvantages with instrumentation, however. These disadvantages can, to a large degree, be anticipated and diminished by your awareness of the following:

1. Some participants may fear that their scores will be made public, and that others will find out damaging information about them. This concern for privacy is a real and legitimate one, and should be honored.

Therefore, only ask people to share their scores in small groups, and with people whom they feel they can trust. Don't require individuals to reveal their scores in large groups unless they are willing. Respect the wishes of any individual who does not want to share his scores at all. Finally, we have often found it useful as instructors and group leaders to share our own scores or responses, thus beginning a "self-disclosure cycle" that helps participants to share their scores. Sharing of your own scores will also facilitate discussion and interpretation of the instrument, as we describe below.

2. Some participants may feel that such instruments cannot measure anything "meaningful." These attitudes are usually related to a general distrust of behavioral science, a fear of disclosure of personal information, and stereotyped images of psychologists that lead to suspicion and denigration of most attempts to make the study of human behavior "scientific." Therefore, show

the relationship of the instrument and scores to real-world examples that would exemplify these scores. For example, with the FIRO-B instrument, show how the person's self-description of himself on the items can relate to behavior that he would demonstrate in interpersonal settings. Also show the relationship of the instrument to the "theory of human behavior" that is being used. Point out those items that cluster together for various aspects of the theory, and how the scores indicate the strength of the individual's dispositions.

You should also be prepared to help the individual explore "contradictory" data--that is, information about himself from the instrument which he finds contrary to his own view of his behavior. This may be done by discovering whether the individual felt he was honest in answering the questionnaire (checking the validity of the responses), and/or asking him to describe his scores to close friends to see whether or not they agree with his self-description (checking the validity of his self-perception).

Also, be prepared to discuss the problems of reliability and margin for error in any set of questionnaire responses. We have usually found it useful to state that any set of questionnaire responses is only one set of data about oneself, and that the data must be explored to see if it is reliable (i.e., to see if the same pattern emerges on additional administrations of the instrument) and valid (fits with the way an individual, or other individuals, perceive his behavior).

3. Finally, do not try to use instruments which are too heavily "value-laden"--that is, instruments for which there is a strong social-desirability component, or where one set of scores (and behavior) is perceived as much more socially valuable than others. Nevertheless, individuals may interpret certain sets of answers in this way. It is important that you stress two things in your discussion of the instrument: First, point out what you may feel to be the "socially desirable" set of responses, and indicate how you feel that this has been built into the instrument. Second, legitimize feeling that not everyone is the same, nor can be and should be the same, and that people whose scores deviate from the norm should not be overly concerned about their differences. In using these instruments, we often get the question, "My scores are so-and-so. Am I weird?" In spite of the humor that may surround the question, it is a serious one for many people in the audience, and you should be prepared to handle it effectively.

From: InterNIC Reference Desk <refdesk@is.internic.net>  
Subject: Eastern and Central Europe, Commonwealth of Independent States  
To: jturner@norfolk  
Date: Tue, 15 Jun 93 10:47:53 PDT

Listed below is an article provided by Mark Boolootian. This article defines the state of international connectivity in the nations of East and Central Europe.

--The InterNc Information Services Staff

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Mark Boolootian

This is the article from Milan Sterba for the RIPE Connectivity Group containing information about the state of international connectivity in the nations of East and Central Europe. It has been edited to try to make it easier for American audiences to read without taking away the meaning Professor Sterba is trying to express. Any comments or corrections, please forward to me. Professor Sterba would also appreciate any updates or comments you may want to make. His address, repeated several times in the article, is <milan.sterba.vse.cs> on Internet. The article was not copyrighted, and can be reprinted. Out of courtesy to the author, please leave his name and address on the header.

Common abbreviations: ECE=East and Central Europe  
IP=Internet Protocol  
RIPE=Regional Internet Protocol Organization (I believe)  
EARN=European version of BITNET

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draft version 5  
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An overview of East and Central European networking activities

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## 1. Introduction

This paper is based on work of the RIPE Connectivity Working Group. It summarises the main issues of international connectivity of East and Central European countries (ECE). It is based on reports and information gathered by network representatives of these countries, who have been present at the meetings or contacted on other occasions.

Thanks are due to all those who helped us to gather the information. Some countries however, are not represented in this report, due to lack of information. Please contact the author if you have amendments or suggestions.

This report contains lists of people who are responsible for international networking in each of their countries and a map of the current situation in IP networking in the those countries. The map doesn't show all existing international lines of those countries but it seeks to be complete for IP lines and other leased lines without usage restrictions for the academic and research communities.

This report has been written by Milan Sterba <Milan.Sterba@vse.cs> and it does not necessarily reflect the opinions of the authors of the national reports nor those of the RIPE community.

## 2. Present situation

This chapter gives as detailed as possible description of the various network activities in the East and Central European countries. The sections for particular countries will be subject to regular amendments or changes.

Considerable progress has been made during the last year in IP connectivity of ECE countries. Czechoslovakia and Poland have today several hundreds of connected hosts each and are the most advanced ECE countries with respect to IP connectivity.

Bulgaria, Estonia and Hungary also have IP connectivity today and have several tens of connected hosts each. By the end of 1992 IP connectivity will probably also reach Latvia and Lithuania through NORDUnet and maybe also Romania and one of the CIS republics.

In all the connected countries the initial capacity of international lines has rapidly become insufficient and an upgrade of existing lines and set up of reasonable backup solutions is being sought. Internetworking is rapidly spreading and good IP connectivity is considered as the first priority by the national academic network organisations.

All the countries considered have at the present time some (often more than one) connection to international networks. Certain countries

have only a dial-up e-mail connectivity, others have low or medium speed leased lines. The present state of international leased lines to ECE countries is represented on the map in Appendix A.

RIPE broadly contributes to this rapid evolution by technical advice and by coordination efforts.

## 2.1 Albania

Currently an electronic mail connection exists between the University of Tirana and the Internet. The gateway and relay function resides at CNUCE, Pisa, Italy.

### Contact Persons:

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## 2.2 Estonia

Estonia works in close co-operation with NORDUnet in setting up external IP links. Currently a 64 kbits/s IP satellite link is operational between Tallin and Stockholm, and between Tartu and Stockholm. These lines connect the Baltic backbone network (BaltNet) to the rest of the Internet. Another 19.2 kbit/s IP line is operational between Tallin and Helsinki.

Inside Estonia IP links are currently planned between the Institute of Cybernetics and the University of Technology in Tallin and the Tartu University.

### Contact persons:

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## 2.3 Latvia

An international 14.4 kbit/s IP line connects the Institute of Informatics and Computer Science of Latvian University in Riga to the Institute of Cybernetics in Tallin, Estonia. This line is part of the Baltic backbone network (BaltNet). Other networks active in Latvia have only dial-up connections (FidoNet to Tallin and Helsinki, RELCOM to Moscow).

Inside Latvia X25 services are available from the public X25 network Latpak and Sprint, UUCP services are available from JET and Versia, who are the Latvian partners of RELCOM-EUnet. FidoNet also is very active.

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Sergey Dmitrijev <dmit@lynx.riga.lv> - JET (RELCOM Riga)

(Note from RB: Egons Bush <egons@castle.riga.lv> and his father, Harlis <harry@castle.riga.lv> have been very much involved in bringing the Internet to Latvia. The elder Mr. Bush is advisor to the President of the Bank of Latvia and was instrumental in putting an IP node in that institution.)

## 2.4 Lithuania

A dial-up EUnet connection exists between Vilnius and Helsinki (Finland). A 9.6 kbit/s X.25 link, used for X.400 electronic mail and sponsored by Norwegian Telecom, exists between Vilnius and Oslo (Norway).

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- Institute for Mathematics, Vilnius

The Baltic states are coordinated within the BaltNet body which plans to build a backbone connecting Baltic states with NORDUnet. A LISTSERV mailing list exists for this purpose at (NORDBALT@searn.sunet.se).

## 2.5 Bulgaria

A switched international X.25 connection connects the Bulgarian EARN node in Sofia to Linz (Austria). A dial-up connection over public X.25 connects the Bulgarian EUnet via the backbone node in Varna to the Internet via the EUnet node in Heraklion (Greece). This connection will be converted to IP/X25 and will be the first IP connection in Bulgaria. Coordination between both projects, resulting in a shared fixed IP connection, is under study.

Several tens of EUnet sites are now connected over dial-up links to the national EUnet backbone. A public X25 service is available to a limited extent. EARN services have been opened recently at Sofia University but no gateway exists between the two services yet.

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Anton Velichkov <vam@bgearn.bitnet> - EARN president for Bulgaria  
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## 2.6 Commonwealth of Independent States.

Dial-up connections between Helsinki, Finland and Amsterdam, Netherlands on the one hand, and Moscow on the other hand connect the RELCOM network in Russia and a few other former USSR republics to the Internet. Currently the services consist of electronic mail and Network News. A medium speed IP line to Amsterdam is planned in the near future. Recently another 14.4 kbit/s IP link has been put between Moscow and AlterNet (USA). On this link only SMTP traffic is allowed. A 4.8 kbit/s leased line between Moscow and DESY in Hamburg, Germany, supporting IP, delivers HEPnet services to two research institutes in Moscow. Low speed links between Moscow and ESOC (Germany) and CNES (France) serve the space physics community. All existing IP links to CIS have full connectivity only to the European part of Internet. The 9.6 kbit/s leased line from Moscow to Copenhagen, Denmark which used to connect the EARN node in Moscow to the EARN/BITNET network has been replaced by a dial-up link to Stockholm due to funding problems.

A considerable effort undertaken by the RELCOM networking organization has brought e-mail connectivity to several thousands sites all over the former Soviet Union. The growth of the network was 400% a year. RELCOM has been operating some IP links in the Moscow and St. Petersburg areas and some other places (Novosibirsk, Barnaul in Altai). Other national IP connections are expected to connect Ukraine, Siberia, St. Petersburg, Far East and other regions in order to set up the kernel of a nationwide IP backbone. The whole network has some 60 regional centres, some of which connect more than 500 sites. RELCOM's international traffic is split over two dial-up lines, one to the Finish EUnet backbone and one the central EUnet node in Amsterdam. Both operate as gateways on application level. The rapidly growing volume of international mail traffic makes the need for a medium speed IP channel to Europe urgent. Part of the international traffic is carried by the filtered IP line to AlterNet.

The first EARN node started its operation in Moscow late in 1991, but proliferation of EARN services is still expected. An e-mail gateway now exists between RELCOM DEMOS and SUEARN. SUEARN also provides the international mail relay services for FREENET, a national research IP network which interconnects some 45 institutes of the Academy of Sciences mostly in the Moskow area with international connections to Jaroslavl and Baku.

The current situation has been badly affected by the split of RELCOM into two independent entities (RELCOM RelTeam Ltd. and RELCOM DEMOS). Each of them holds a part of CIS network users and part of international connectivity. While RELCOM RelTeam Ltd. has inherited

RELCOM's membership in EUnet, RELCOM DEMOS seems to position itself as a partner of AlterNet in CIS. Negotiations are still underway to find a cooperative approach to national and international connectivity.

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## 2.7 Czechoslovakia

A 64 kbit/s IP link between Prague and Linz (Austria) is operational today. The line is full IP carrying general IP, EARN and Czech EUnet traffic. A second link, 14.4 kbit/s between Bratislava and Vienna is shared between EUnet traffic and general IP traffic and IXI.

(Note from RB, The IP link out of Prague was transferred from Linz to the University of Vienna in November, 1992.)

The upgrade of this link to 64 kbit/s is planned for the near future. Both links connect into the upcoming national academic backbone networks CESNET (Czech Educational and Scientific Network) and SANET (Slovak Academic Network). Both networks are interconnected with IP links with the aggregate capacity of 28.8 kbit/s (19.2 kbit/s IP link between Prague and Banska Bystrica and 9.6 kbit/s Prague-Bratislava).

Both CESNET and SANET are now setting up national backbone infrastructures connecting major academic towns in the country. 64 kbit/s lines are used wherever available and considered necessary, 19.2 kbit/s on all other links. The first protocol supported is IP. Connected to the backbones are appearing metropolitan networks in major cities.

The major coordinating bodies are CESNET and SANET where universities as well as Academy of Sciences, EARN and EUnet are represented. A good cooperation exists between both separately funded projects as well as between AConet, EARN, EUnet, WIN, INRIA France and others.

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 Milan Sterba <Milan.Sterba@vse.cs> - author of this report, CESNET

## 2.7 Hungary

Hungary is connected to EARN by a 9.6 kbit/s IP line between Budapest and Linz (Austria). For the time being the same line is used also for the Internet and EUnet connection. It is planned to upgrade this line to 64 kbit/s in 1992. The High Energy Physics community has access to HEPnet services via a 9.6 kbit/s leased line between Budapest and CERN, Geneva (Switzerland) which is now running IP.

(Note from RB, I believe the Internet connection out of Budapest has also been transferred from Linz to Vienna. Also many Internet addresses in Budapest originate within the <uni-wien.ac.at> domain.)

Hungary has a good operational public X25 network which is the base of Wide Area Networking between small and medium sized sites. Currently there are about 250 X.25 access points in the country. A high speed national IP backbone (called HBONE) will come into production in 1993 to provide a country wide IP connectivity and access to EBONE services.

In Hungary a national program under the title "R&D Information Infrastructure Program (IIF)" is responsible for the research networking. The "HUNGARNET" co-ordinates the networking activities of different user groups, such as "HUNINET" (Universities and high schools), "AKANET" (academic research institutes), and the user group of public collections (libraries, museums), meanwhile part of the funding goes through IIF.

### Contact persons:

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## 2.8 Poland

The main external connection consists of a 64 kbit/s satellite link between Warsaw and Stockholm, Sweden. The link is an IP one and carries all Internet, EARN and EUnet traffic. A new 64 kbit/s IP link is being set up between Warsaw and Vienna with the objective to establish an Ebone Bondary System in Warsaw. A 9.6 kbit/s IP connection is in place between Krakow and CERN in Geneva, Switzerland for HEPnet services.

Public X.25 services have only started in 1992. Thus connections at national level can only be implemented on switched or leased lines. The country already has an infrastructure of leased lines, shared between EARN and IP traffic operating at speeds between 9.6-64 kbit/s.

The Polish network is coordinated by an organization called NASK (National Academic and Research Network) which also includes the Polish part of EARN. Realistic plans exist to substantially extend IP connectivity over the territory in 1992 using 64 kbit/s lines on their national backbones wherever possible and economically viable. A National Network Operation and Monitoring Center has been set up in early 1992 which operates the whole national and international infrastructure. A system of network user training and support has also been put in place.

### Contact persons:

Daniel J. Bem <bem@plwrtull.bitnet>	- Polish academic network(NASK)
Jerzy Gorazinski <Gorazi@plearn.bitnet>	- Polish State Committee for Scientific Research
Krzystof Heller<uiheller@plkracy11.bitnet>	- contact for PL domain
Tomasz Hofmokl <fdl50@plearn.bitnet>	- EARN director for Poland
Rafal Pietrak <rafal@fuw.edu.pl>	- IP within NASK
Jerzy Zenkiewicz <jezenk@pltumk.bitnet>	- Polish academic network(NASK)
Andrzej Zienkiewicz <osk03@plearn.bitnet>	- Polish academic network(NASK)

## 2.9 Romania

International connectivity is now provided by a switched X25 link to EARN in Austria. A 9.6 kbit/s leased line is planned before the end of 1992 between Bucharest and Linz, Austria. This line will be able to carry both IP and EARN/NJE/BSC traffic.

Romania has poor internal networking infrastructure. A government project of building a public X25 network is under commercial

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negotiations and should start to offer some services in 1993.

In Romania the emerging networking activities seem to be coordinated by the National Council for Informatics and the Polytechnic Institute of Bucharest.

Contact persons:

Florin Paunescu <florin@imag.fr> - National Council for Informatics  
Paul Dan Cristea <pdcristea@pi-bucuresti.th-darmstadt.de>  
- Polytechnic Institute of Bucharest

## 2.10 Slovenia

Slovenia is connected over a 64 kbit/s IXI access point in Ljubljana to the IXI backbone. Over this connection an IP link via NIKHEF, Amsterdam (Netherlands) provides Internet connectivity. A PSDN X25 connection connects the main EUnet node in Ljubljana to EUnet. Another IXI access point, also located in Ljubljana, connects Croatia, Bosnia and Herzegovina to IXI over the JUPAK PPSDN.

Currently Slovenia have achieved a well spread-out branching of their national networks due to the existence of a wide spread public X.25 network. There exists as well a developed X.400 service.

In Slovenia the Academic and Research Network of Slovenia (ARNES) is coordinating network activities. In Croatia the coordinating organization is CARNet and both organizations cooperate.

Contact persons:

Leon Mlakar <leon@ninurta.fer.si> - EUnet backbone manager YU  
Borka Jerman-Blazic <jerman-blazic@ijs.si>  
Marko Bonac <marko.bonac@ijs.si> - ARNES Executive Director  
Denis Trcek <denis.trcek@ijs.si> - ARNES

## 2.11 Serbia and Montenegro

Serbia has had a 9.6 kbit/s leased line between Beograd and Linz to carry EARN traffic. Currently this line is cut after a decision by the Austrian government to cooperate with the UN embargo on Yugoslavia.

Contact persons:

Jagos Puric <xpmfd01@yubgss21.bitnet> - EARN director for YU

(Note from RB: Because of those same UN sanctions and the US Government's support of those sanctions, it is illegal under federal law to have commercial contacts with Yugoslavia.)

## 2.12 Macedonia

The University of Skopje, Macedonia recently was made the lead organization for the country by the Ministry for Science and Technology for inaugurating networking activities in the country. They joined CEED and are planning soon an IP connection.

Currently Macedonia has achieved a good degree of capillarity of their national network (DECNET) due to the existence of the public X.25 network, which is a part of JUPAK PPSDN.

### Contact persons:

Marjan Gusev <pmfmarj%numbsk@uni-lj.ac.mail.yu> or <gusev@lut.ac.uk>  
- Faculty for Natural Sciences, Gazibaba, Skopje  
Aspazija Hadzisce <rkntriasp%numbsk@uni-lj.ac.mail.yu>  
- Ministry for Science and Technology, Skopje

## 3. Evolution

All the ECE countries are very interested in European as well as world wide IP connectivity. In Czechoslovakia, Hungary and Poland there has been rapid growth of connected IP networks and hosts in the academic community. Their existing international leased lines infrastructure is now shared by EARN, EUnet and raw IP services. Linz University and ACONET in Austria have become important concentrating points for networking in Bulgaria, Czechoslovakia, Hungary as well as Poland and Romania.

The financial resources dedicated to networking in these countries are limited. The sharing of the existing national and international leased lines between EARN, EUnet and other IP traffic as well as between academic and starting commercial traffic is thus a very important issue. Lightweight but robust IP gateway solutions (over dial-up lines, leased serial lines or X25 networks) are of great concern in this respect and are continuously studied and further developed (e.g. COPERNICUS).

By the end of this year the Budapest-ACONET link at least will be operating at 64 kbit/s. It is probable that new IP lines will be operational at this time (Bratislava-Vienna, Moscow-Amsterdam).

At the same time the national infrastructure of the countries will continue to evolve. We can expect an increase in national coverage in countries with working public X25 networks and in Czechoslovakia and Poland as well as strong increase in IP connectivity within the CIS.

## 4. International Initiatives

Several international support initiatives have been launched in the past by different bodies to improve international network connectivity of the Central and Eastern European countries. The following list presents some of them :

The Ebone 92 consortium has shown itself very supportive during 1992 by allowing traffic of ECE countries to pass freely over the Ebone and letting so the ECE countries traffic cross Europe. This situation changes in 1993 when Ebone will adopt a more formal financial model.

RIPE and the RIPE NCC have widely contributed to the rapid integration of new ECE networks into the global Internet. RIPE has acted to initiate a common coordination effort of academic networking organizations in Bulgaria, Czechoslovakia, Hungary and Poland. The first meeting to coordinate its initiatives was held in February, 1992 in Prague with successful cooperation since then, continued at the 3rd Joint European Networking Conference in Innsbruck, where RARE has proposed to be the coordinator of ECE integration into European Academic networking, formalized in Prague in August, 1992. CEEC@RARE.NL is now the discussion group and has the mailing list on common ECE networking issues.

Also both EARN and EUnet have widely contributed to the successful start of international networking in ECE countries, by placing the first network nodes in these countries, supporting the activity of these nodes both financially and through extensive know-how transfer.

Despite this expressed willingness to cooperate (RARE, RIPE, EARN, EUnet etc.) some support efforts are still not coordinated, which sometimes leads to the waste of limited resources. An EC SHARE project dedicated to extend the former COSINE IXI project to Bulgaria, Czechoslovakia, Hungary, Poland and Romania has started this year. Medium speed 64 kbit/s lines have been ordered between Amsterdam-Prague-Budapest-Bern and between Aarhus-Warsaw-Bern. These lines, initially financed by the EC, should provide connectivity from ECE countries to the planned European Multiprotocol Backbone (EMPB). It should also provide access points to X.25 as well as IP services. Unfortunately the coordination with RIPE and Ebone as well as with the academic networking organizations in the countries involved has to date experienced poor results in eliminating redundancy in the use of scarce infrastructural resources in ECE countries.

Austria is the major relay point between ECE countries and Western Europe (and beyond). The Austrian government is very supportive and either covers fully or contributes in a significant manner to the costs of international connections to these countries. In February 1992 ACONET has made an even greater proposal, offering these countries (Bulgaria, Czechoslovakia, Hungary and Poland) double connectivity to both Vienna and Linz. Each of these countries should have one link to both places, thus permitting line backup. The Vienna-CERN line has been upgraded in October 1992 to 256 kbit/s and the Linz-CERN line (64 kbit/s) is being replaced by a Linz-Amsterdam line (128 kbit/s) in order

to accomodate traffic increase from these countries and offer a real backed-up connectivity to Ebone. The ACONET proposal for Ebone 93 to place an EBS to Austria seems well justified from the point of view of the connectivity of ECE countries.

CERN plays also an important role in the IP connectivity of the new countries. It houses actually a 9.6 kbit/s line from Krakow and another HEPnet 9.6 kbit/s line from Budapest. Due to lack of resources CERN prefers not to house a lot of low rate lines from every country but rather to house a higher rate line concentrating traffic from several countries. This is in fact in perfect conformance with the ACONET proposal.

The German DFN network has launched several regional initiatives to connect sites in geographical proximity of Germany (e.g. Dreilaendereck project connecting Liberec in Czechoslovakia, Wroclaw in Poland and Zittau in Germany using leased links based on X25 with further connectivity to DFN). DFN also provides X400/SMTp gateway for Slovenia.

The Italian government has financed in 1990 and 1992 successful network workshops (NetSchool) to which about 50 network specialists from ECE countries have attended. A second extended edition of NetSchool has taken place in April 1992 with participation of network specialists from RIPE and attendees from ECE countries, some South American, Asian and African countries.

A similar event has been organized by NORDUnet for network users and operators from the Baltic states.

The French government has expressed its willingness to help the integration of new countries to the world of academic networking by launching in cooperation with INRIA a project called Copernicus, which aims to improve network connectivity of several Eastern European Countries. One of the first results of this project has been the cooperation on design and implementation of the academic IP backbone CESNET-SANET (Prague - Brno - Bratislava ... Banska Bystrica - Kosice) in Czechoslovakia. The project consists of transfer of network management and administration know-how, common development of tools and some software and hardware donations. Similar activity is starting now with Romania.

IBM is also present in these countries with its academic initiative, in which IBM mainframes have been offered to Czechoslovakia, Hungary and Poland. IBM and EASInet act also as sponsors for the T1 US link usage for academic networks in Czechoslovakia, Hungary, Poland and Slovenia.

Strong support for the integration of ECE countries into the global network also comes from the United States. The National Science Foundation has always been very supportive to academic networks in ECE countries by promptly helping them to solve global connectivity problems.

Many projects aiming at improving local, national, and international infrastructure, know-how transfer and mission-oriented network applications are now in progress.

(Note from RB: Steven Goldstein <goldstein@nsf.gov> Internet or <goldstein@nsf> BITNET, is the contact at NSF. He contributes to many of the East European discussion groups.)

The assistance of countries with developed networking shouldn't be uniquely oriented to basic network connectivity. A lot of work needs to be done in the ECE countries to offer and improve higher level network services like e-mail, teleconferencing, archive services, online databases and library catalogues etc., as well as in basic network concepts, user information services and advanced networking know-how transfer. That's why new EC projects proposals are now oriented not only on infrastructure but also on higher level services (e-mail, electronic directory, user information and training.) The lack of funds puts ECE countries at a disadvantage and the exchange rates with the West still make it difficult for ECE network experts to attend international networking exhibitions.

#### 5. Technical issues

As already mentioned, distributing international network access over the local territory is a major problem for the countries considered. While it is relatively easy and cheap to set up a local TCP/IP network, it is more difficult to connect it to the national access point. Generic router solutions are rather expensive on one side and not completely free of administrative exportation problems for all countries involved.

The solution to these problems are software routers based on PC's or workstations and public domain or easily available software.

A low cost capillarity of networks being of great importance to ECE countries, good dial-up IP solutions of both industrial and public domains, which are under study and evaluation in EUnet, RIPE, Copernique, NetSchool and others, are of great interest as well as low cost IP solutions on synchronous lines (X25 or PPP) and low cost solutions for network monitoring and management.

The technical speed limitations for international leased lines seem now to become less restrictive than in the past. For Czechoslovakia, Hungary and Poland, international links of up to 2 Mbits/s are now feasible.

With basic connectivity problems for the most part overcome, network services are now becoming major issues in the most advanced ECE countries. PC's remain the most spread technical basis, thus network solutions based on platforms (routers, mail, news, archive and information servers and clients) based on either UNIX or MS DOS are of

major concern today.

## 6. Organizational issues

The starting period in international networking is often characterized by a fuzziness in the organizational structure together with a lack of information about the people actually responsible and working in the area. The situation is nearly stabilized in Croatia, Czechoslovakia, Hungary, Poland and Slovenia, where national academic networking groups have been founded and are coordinated with EARN/EUnet activities. This coordinated effort tends to build nation wide multiprotocol academic network infrastructures. A similar effort is underway in Bulgaria (UNIKOM, EARN and EUnet Bulgaria). These countries seem also to have found a stabilized position in international network organizations (EARN, EUnet, RARE, RIPE). The situation is more complicated in other countries where international contacts are for various reasons much more scarce.

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=====
Prague School of Economics e-mail : Milan.Sterba@vse.cs
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Czechoslovakia
=====
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# Instructional Systems Development

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- **Front End Analysis**
- **Establish Goal/Write Objectives**
- **Select Content**
- **Determine Instructional Techniques**
- **Develop Follow-up Procedures**

# Follow up And Evaluation

## ■ Increase In:

*Number of Orders or Contacts*



*Gross Sales*



*Net Profit*



*Market Share*



## ■ Improved Evaluation

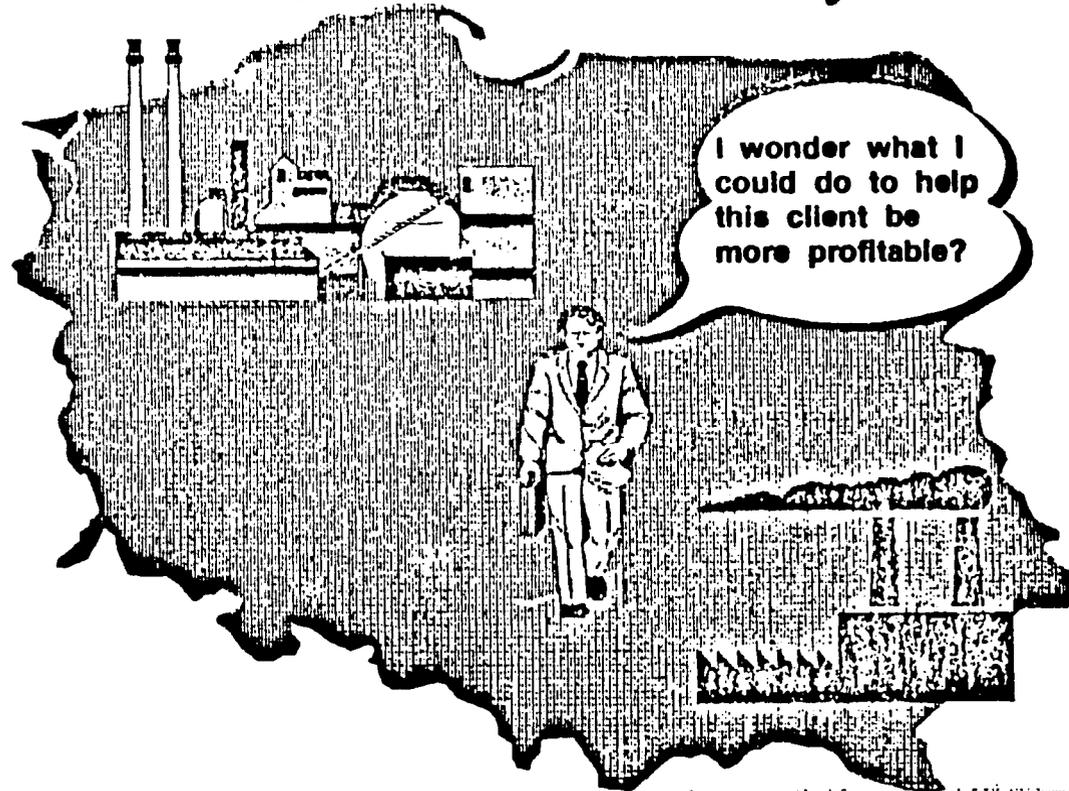
*(Customer Satisfaction)*



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# Sales Training

*For A Transition Economy*

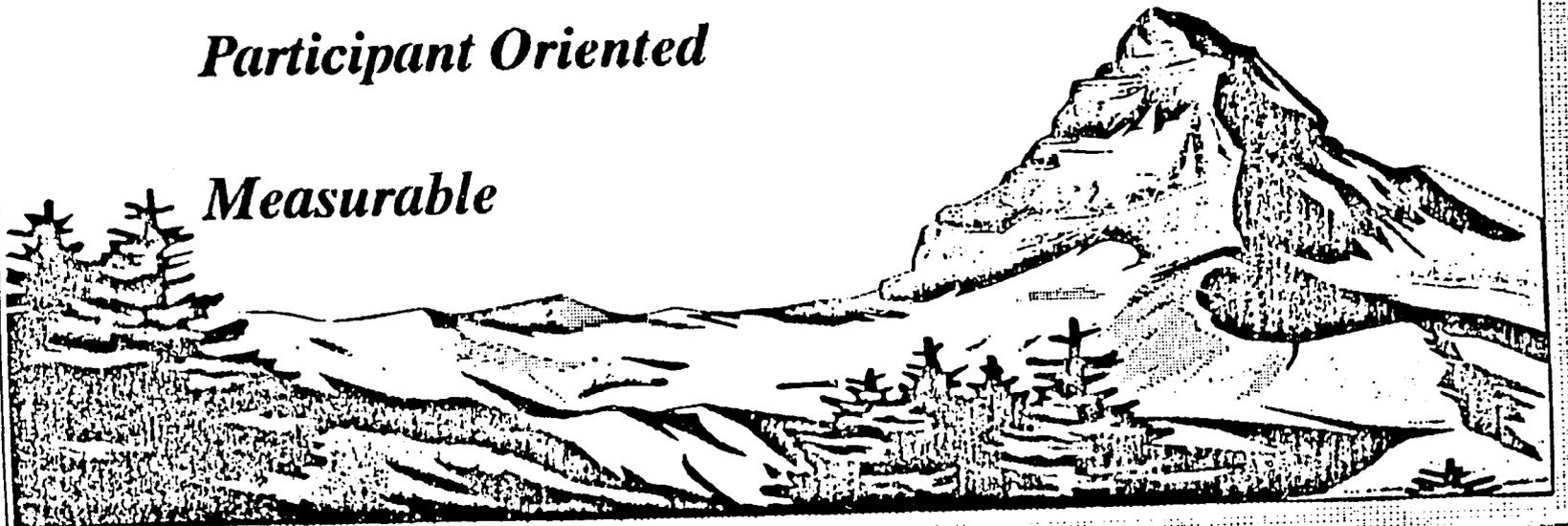


# Establish Goals/Objectives

- Establish Overall Goal of Seminar
- Write Specific Objectives

*Participant Oriented*

*Measurable*



# Front End Analysis

## ■ Determine Target Group

*Owner/Manager*  
*Sales Staff*



## ■ Conduct Needs/Task Analysis

## ■ Analyze Data



# The Role of Client/Consumer

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Manufacturer

Wholesaler/  
Distributor

Retailer

Client/  
?  
Consumer

# Selecting Content

## ■ Economic Understanding

*Business Cycle*

*Competition (Local, Reg., & Int.)*

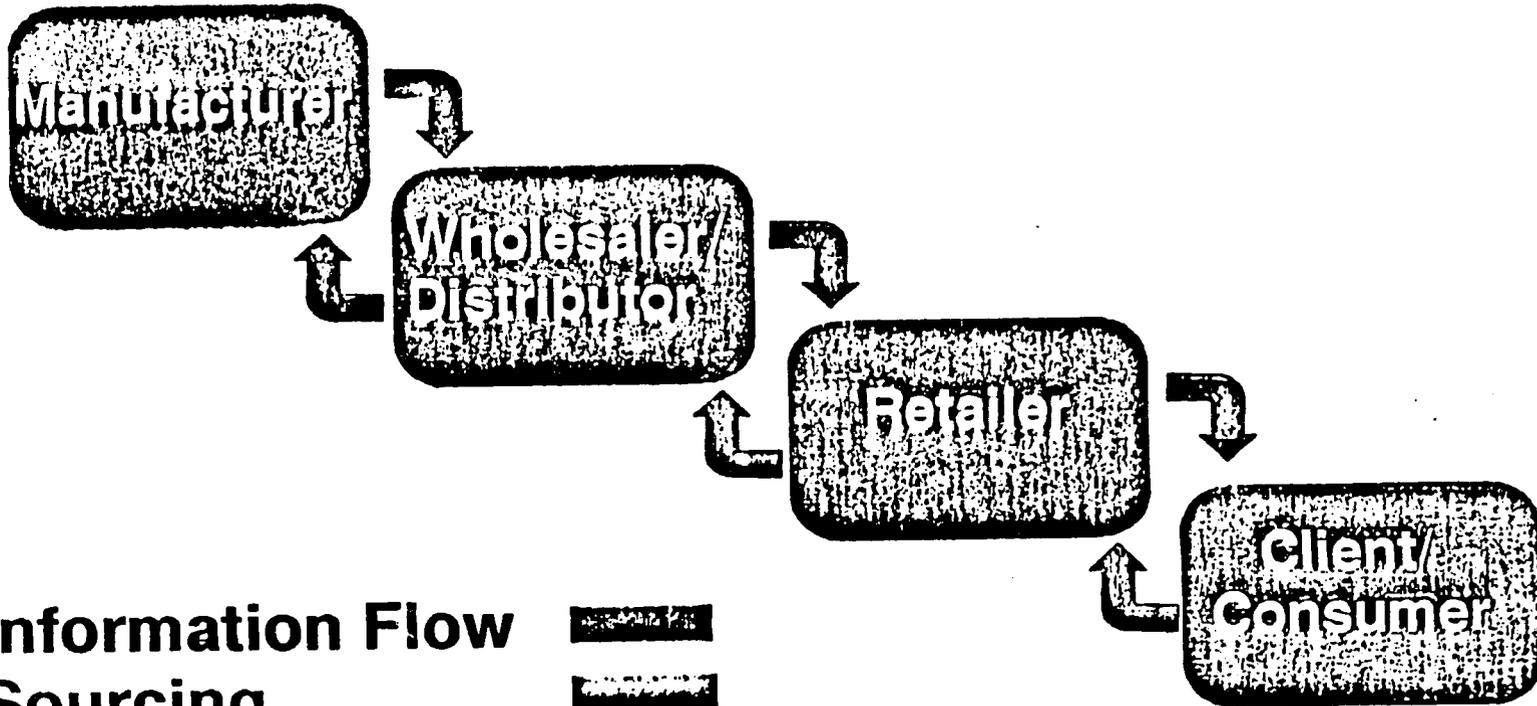
*Sales Philosophy*

*Solving Problems vs Selling Products*

*Selling Companies vs Products*

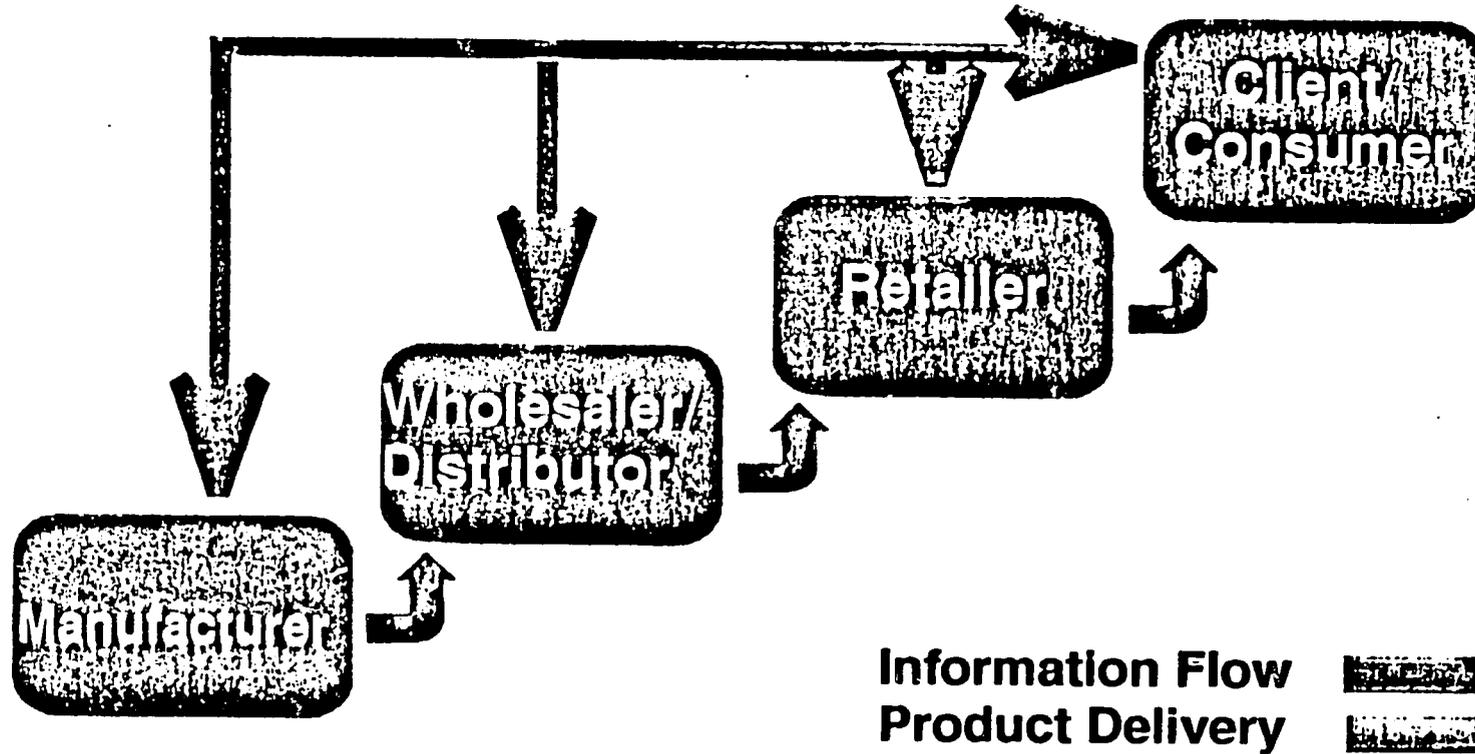
# Production/Supply

*Economy*

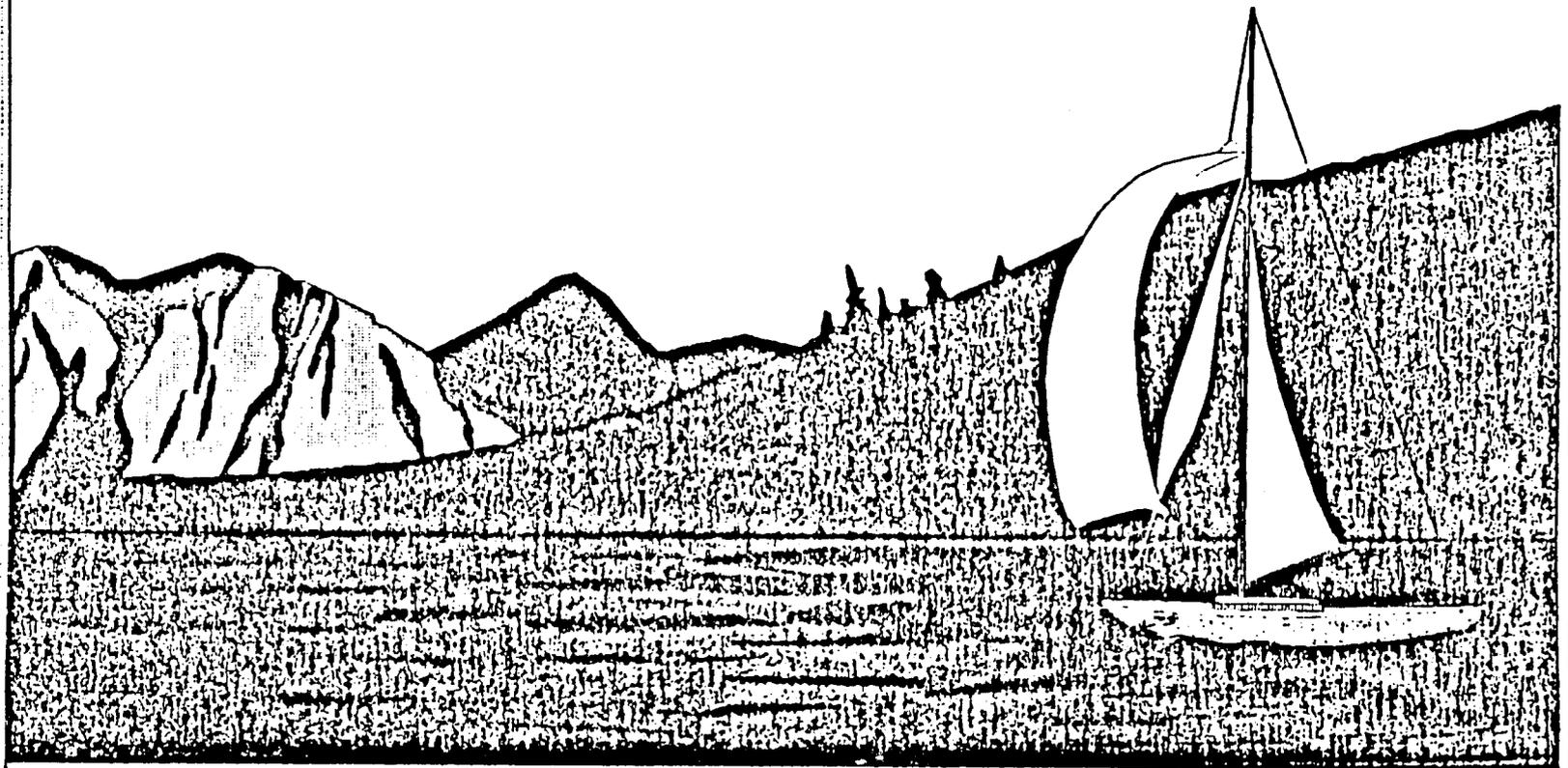


# Market

*Economy*



# -BREAK TIME-



# Instructional Techniques (Continued)

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## ■ Participant Centered

*Team Discussion/Problem Solving*

*Case Technique*

*Role Play*

*Simulations with Video Playback*

*Peer Review*

# Instructional Techniques

## ■ Instructor Centered

*Briefings*

*Information Model*

*Push vs Pull*

*Audio/Visual Suppliments*



# Selecting Content (cont.)

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## ■ Managing A Sales Staff

*Establishing Positive Org. Env.*

*Policy Development & Training*

*Encouraging Consultative (Adaptive) Phil.*

*Developing A Team Approach*

*Providing Appropriate Compensation*

# Selecting Content (cont.)

## ■ Mechanics of Selling

*Setting Personal Goals*

*Researching Clients*

*Making Calls*

*Managing Time*

*Follow-through*





**APPENDIX**

# 7.0

**DEVELOP CASE  
STUDIES OF  
POLISH  
ENTREPRENEURS**

## FACULTY WORKSHOP EVALUATION

1. Please rate the following on a 1-5 scale where 5 = best/good and 1 = worst/bad.

	5	4	3	2	1
Organization of the management					
Opportunity to gain new information					
Opportunity to participate					
Speakers					

2. What did you like best about the meeting?

3. What did you like least about the meeting?

4. What do you still need to help you teach the program?

5. Other comments:



**APPENDIX**

**8.0**

**CONDUCT FACULTY  
UPGRADING  
WORKSHOPS**



## APPENDIX

# 9.0

CONDUCT POLISH  
NATIONAL  
CONFERENCE



**APPENDIX**  
**10.0**

**FINANCIAL REPORT**

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# FINANCIAL STATUS REPORT

(Short Form)

(Follow instructions on the back)

cm

<b>1. Federal Agency and Organizational Element to Which Report is Submitted</b> Agency for International Development Office of Financial Management	<b>2. Federal Grant or Other Identifying Number Assigned By Federal Agency</b> EUR-0029-G-00-1040-00	<b>OMB Approval No.</b> 0348-0039	<b>Page</b> 1	<b>of</b> 1  pages
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**3. Recipient Organization (Name and complete address, including ZIP code)**  
 The Ohio State University Research Foundation  
 1960 Kenny Road  
 Columbus, Ohio 43210-1063

<b>4. Employee Identification Number</b> 31-6401599	<b>5. Recipient Account Number or Identifying Number</b> 724951/769185-01	<b>6. Final Report</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>7. Basis</b> <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual
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<b>8. Funding/Grant Period (See Instructions)</b> From: (Month, Day, Year) 5 / 28 / 91	<b>9. Period Covered by this Report</b> From (Month, Day, Year) 7 / 01 / 93	<b>To: (Month, Day, Year)</b> 6 / 20 / 94	<b>To: (Month, Day, Year)</b> 9 / 30 / 93
--	---	--	--

10. Transactions:	I Previously Reported	II This Period	III Cumulative
a. Total Outlays	2,418,302.29	292,031.77	2,710,334.06
b. Recipient share of outlays	145,224.91	1,274.11	146,499.02
c. Federal share of outlays	2,273,077.38	290,757.66	2,563,835.04
d. Total unliquidated obligations			150,049.39
e. Recipient share of unliquidated obligations			0.00
f. Federal share of unliquidated obligations			150,049.39
g. Total Federal share (Sum of lines c and f)			2,713,884.43
h. Total Federal funds authorized for this funding period			2,937,897.00
i. Unobligated balance of Federal funds (Line h minus line g)			224,012.57

<b>11. Indirect Expense</b>	a. Type of rate (Place "X" in appropriate box) <input type="checkbox"/> Provisional <input checked="" type="checkbox"/> Predetermined <input type="checkbox"/> Final <input type="checkbox"/> Fixed	b. Rate 29%	c. Base 86,955.55	d. Total Amount 26,491.22	e. Federal Share 25,217.11
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**12. Remarks:** Attach any explanations deemed necessary or information required by Federal sponsoring agency in compliance with governing legislation.

**13. Certification:** I certify to the best of my knowledge and belief that this report is correct and complete and that all outlay and unliquidated obligations are for the purposes set forth in the award documents.

Typed or Printed Name and Title Richard W. Bradbury Manager, Fiscal Services	Telephone (Area code, number and extension) (614) 292-1381
Signature of Authorized Certifying Official 	Date report Submitted 10-26-93

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**Year III  
Financial Status Report  
(by Subcomponent)**

**July - September, 1993**

<b>Budget Category</b>	<b>Revised Budget</b>	<b>9th Quarter Total</b>	<b>3-year Total to Date</b>	<b>Encumbered</b>	<b>Balance</b>
<b>Direct Costs</b>					
Salaries/Wages	\$653,321	\$51,390	\$554,536		\$98,785
Fringe Benefits	163,553	14,678	139,090		24,463
Consultants	155,277	2,883	123,166		32,111
Travel/Per Diem	305,375	6,732	263,739	1,915	39,721
Materials	52,624	800	31,418	145	21,061
Non-Expendable equipment	32,292	---	26,749	4,193	1,350
Subcontracts	1,006,000	178,885	865,585	140,915	-500
Other Direct Costs	124,652	10,472	166,649	715	-42,712
<b>SUBTOTAL</b>	<b>\$2,493,094</b>	<b>\$265,540</b>	<b>\$2,170,932</b>	<b>\$147,883</b>	<b>\$174,279</b>
<b>Indirect Costs</b>	<b>444,803</b>	<b>25,217</b>	<b>392,903</b>	<b>2,166</b>	<b>49,734</b>
<b>TOTAL</b>	<b>\$2,937,897</b>	<b>\$290,757</b>	<b>\$2,563,835</b>	<b>\$150,049</b>	<b>\$224,013</b>

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# Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data, page 1)

Institution: Ohio State University

Quarter: Year III, 1st qt Contact Person Regarding this Report:

Cathy Ashmore

Project Component: Entrepreneurship Institute

PROJECT EXPENDITURES	AID FUNDS		GRANTEE (COST SHARE)		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected			
Staff Salaries U.S. (Instruc.)	51.4								554.5	98.8	
Staff Salaries U.S. (Staff)											
Fringe Benefits	14.7								139.1	24.5	
Salaries Local											
Consultants	2.9								123.2	32.1	
Travel - Per Diem	6.7								263.7	39.7	
Nonexpendable Equipment									26.7	1.3	
Expendable Supplies	.8								31.3	21.1	
Indirect Costs	25.2		15.9						503.8	49.7	
Participant Costs											

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Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data- Page 2)

PROJECT EXPENDITURES	AID FUNDS		GRANTEE		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
	Workshops, Seminars, Conf.										
Video/T.V. Production											
Subcontractors Solidarity	178.9		60.0						1016.9	140.0	
Subcontractors											
Subcontractors											
Translation											
Scholarships											
Curriculum Development									5.0		
Other Direct Costs	10.5								166.6	-42.7	
Other											
<b>TOTAL PAGE 1 &amp; 2</b>	<b>290.6</b>		<b>75.9</b>						<b>2830.8</b>	<b>364.9</b>	

## SOLIDARITY FINANCIAL SUMMARY

### YEAR III

	<u>Budget</u>	<u>Expenses</u> <u>First Quarter</u>
<b>A. Institutes</b>		
Operations	\$120,000	—
Satellite Centers	90,000	—
Faculty Seminars	30,000	—
Equipment	<u>12,000</u>	<u>—</u>
Subtotal	\$252,000	\$52,500
<b>B. Solidarnosc</b>		
Staff	10,000	2,400
Translations	2,000	—
Local Travel	5,000	325
U.S. Trip	28,000	17,474
Materials/Supplies	1,000	110
Equipment	5,000	—
Phones/Postage	3,000	150
National Conference	8,000	—
Case study Publication	<u>5,000</u>	<u>—</u>
Subtotal	\$67,000	\$20,459
<b>TOTAL</b>	<b>\$319,000</b>	<b>\$72,959</b>

# SOLIDARITY FINANCIAL SUMMARY

## YEAR III

	<u>Budget</u>	<u>Expenses First Quarter</u>
<b>A. Institutes</b>		
Operations	\$120,000	—
Satellite Centers	90,000	—
Faculty Seminars	30,000	—
Equipment	<u>12,000</u>	—
Subtotal	\$252,000	\$52,500
<b>B. Solidarnosc</b>		
Staff	10,000	2,400
Translations	2,000	—
Local Travel	5,000	325
U.S. Trip	28,000	17,474
Materials/Supplies	1,000	110
Equipment	5,000	—
Phones/Postage	3,000	150
National Conference	8,000	—
Case study Publication	<u>5,000</u>	—
Subtotal	\$67,000	\$20,459
<b>TOTAL</b>	\$319,000	\$72,959

# Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data, page 1)

Institution: Sol. Ec. Foundation

Quarter: Year III  
1st Quarter

Contact Person Regarding this Report: Alicja Unterschuetz

Project Component: Entrepreneurship Institutes

<b>PROJECT EXPENDITURES</b>
-----------------------------

	AID FUNDS		GRANTEE (COST SHARE)		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
Staff Salaries U.S. (Instruc.)											
Staff Salaries U.S. (Staff)											
Fringe Benefits											
Salaries Local - Poland	2.4	5.0							32.0		
Consultants		1.0							10.0		
Travel - Per Diem	17.8								21.4		
Nonexpendable Equipment			3.0						15.7		
Expendable Supplies			1.0						5.6		
Indirect Costs											
Participant Costs											

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Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data- Page 2)

PROJECT EXPENDITURES	AID FUNDS		GRANTEE		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
Workshops, Seminars, Conf.									20.0		
Video/T.V. Production									21.8		
Subcontractors Institutes	52.5		50.0						327.3		
Subcontractors											
Subcontractors											
Translation									2.8		
Scholarships											
Curriculum Development									15.3		
Other Direct Costs	.2								6.8		
Other Nat'l Conf.									27.2		
<b>TOTAL PAGE 1 &amp; 2</b>	<b>73.0</b>		<b>60.0</b>						<b>505.9</b>		