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**End-of-Project Evaluation of OIC Poland's Program of Humanitarian  
and Development Assistance/Services to Help the Unemployed,  
Business and NGOs, and to Further Economic Development**

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## ABBREVIATIONS

- ABCs - Refers to OIC Poland's "ABCs of Small Business" Creation course
- ACAP - American Committee for Aid to Poland
- AID/W - Agency for International Development, Washington DC
- BAS - OIC Poland's Business Advisory Services unit
- CEO - Chief Executive Officer
- EEC - The European Economic Community, a donor agency in Central Europe
- FY - Fiscal Year
- IBM PC - International Business Machines Personal Computer
- LO - Labor (Employment) Office of the Ministry of Labor & Social Policy
- MOVE - An EEC program that includes a secondary school course, "Entering the Labor Market," being developed by EEC with the Ministry of Education, that is similar to OIC Poland's "Preparing to Enter the Job Market" elective course
- NGO - Non-governmental organisation, European/multilateral term for a PVO
- OIC - Opportunities Industrialization Center, an indigenous PVO affiliated with OIC International
- OICI - Opportunities Industrialization Centers International, an American PVO
- OICP - Opportunities Industrialization Center Poland, based in Lublin
- PHARE - An EEC economic development program targeted at Poland and Hungary

- RLO - A Regional Labor Office of the Ministry of Labor & Social Policy
- PVO - Private voluntary organization
- SBA - OIC Poland's Small Business Advisory unit
- SBAC - OIC Poland's Small Business Advisory Center
- TCT - Technical Cooperation Team or Program, refers to OICI staff and/or consultants serving an OIC, in country
- TDY - Temporary Duty visit to an OIC by an OICI staff member or consultant
- USAID - United States Agency for International Development, refers both to USAID headquarters at Washington DC and/or a field mission
- UNDP - United National Development Programme
- USDOL - United States Department of Labor
- ZL - Polish zlotys, refers to Poland's unit of currency

## PREFACE

### A. AIM OF THE EVALUATION

This End-of-Project Evaluation of USAID/Washington-OIC International Cooperative Grant Agreement No EUR-0032-A-00-2085-00 assesses (1) progress and current status of key program initiatives of the Opportunities Industrialization Centers Poland Foundation (OIC Poland), (2) program impacts, and (3) the OIC's support base, institutional capability and lessons learned. The Grant became effective on 15 September 1992 and expires on 31 July 1995. However, because USAID funding did not become available to OIC Poland until March 1993, the program's progress to date (March-April 1995) essentially reflects two years of training activity.

Stated Purpose of the USAID/OIC International Cooperative Agreement is "To establish and institutionalize a community-based, economic development training and employment services program in Poland to assist the unemployed, existing and potential entrepreneurs and community action groups to develop skills needed for enterprise creation and employment."

### B EVALUATION METHODOLOGY

Pre-field-trip activity of the American members of the evaluation team consisted of primary and secondary research and analysis, based upon discussions with pertinent officials of OIC International, and a comprehensive set of documents made available by them.

*(The detailed Scope of Work for this evaluation appears as Appendix A to this Report)*

During their activity in Poland, the American and Polish team members spent various amounts of time between 25 March and 14 April 1995 assessing the program in the Lublin Voivodship, several other voivodships, and in Warsaw.

o The evaluators contacted 94 individuals. Among those interviewed were 17 members of OIC Poland's professional staff, the Chairman and three other members of its Board of Directors, 36 completers of and/or participants in the OIC's courses for business persons and the unemployed, 15 teachers and directors of secondary schools that have adopted the OIC's "Preparing to Enter the Job Market" course, and educators and economic development officials of various voivodships, 11 officials of the Ministry of Labor and Social Policy and Regional Labor Offices, and the five top executives of OIC International.

o The evaluators met twice with the Director and four other officials of USAID Warsaw --first at an initial orientation briefing, upon arrival in Poland on March 27, and then at a pre-departure debriefing on April 13 They also debriefed OIC Poland's Executive Director and members of its Board of Directors on April 9 On April 20, shortly after return to the United States, the American members of the evaluation team debriefed the executives and program specialists of OIC International at Philadelphia

*(Appendix B of this report lists the names and affiliations of the 94 persons contacted during the End-of-Project Evaluation )*

## C THE EVALUATORS

Grant Agreement No EUR-0032-A-00-2085-00 specifies that "OIC International is encouraged to provide at least one evaluator from its permanent staff, and at least one evaluator will be an individual not employed by OICI," who has been approved in advance by USAID/EUR's Project Officer Four evaluators conducted the End-of-Project Evaluation -- two based in the United States and two based in Poland

Stanley A Barnett, principal evaluator and team leader, an independent consultant and specialist in NGO program design and evaluation Over a period of 20 years, he has evaluated numerous OIC field programs on behalf of USAID/Washington, USAID field missions, UNDP and OIC International (including the 1993/1994 Mid-Term Evaluation of OIC Poland) He also has extensive experience regarding enterprise development programs in Europe, the U S and the Third World

Michał Boni, PhD, an independent, Europe-wide economic development consultant based in Warsaw, is Director of the Batory Foundation's Program for Social Policy Reforms From 1991 through 1993, he was Poland's Minister of Labor and Social Policy, and Secretary of State for the Ministry A former member of the Polish Parliament, Dr Boni also was President of Solidarity's Warsaw Region and member of the Presidium of its National Commission

Grazyna Geshicka, PhD, independent consultant based in Warsaw, serves the EEC's Cooperation Fund PHARE Program of Local Initiatives in Socio-Economic Development in Poland and Hungary A former Senior Lecturer at Warsaw University, she has advised the Ministry of Labor and Social Policy on local labor markets and was Research Director of a Solidarity regional study center Ms Geshicka participated in the 1993/1994 Mid-Term Evaluation of OIC Poland

Sravani Ghosh-Robinson is OIC International's Evaluation Officer She plans, organizes and manages OICI's world-wide evaluative activity in collaboration with donors and partner NGOs Since joining OIC International in 1992, she has personally participated in five evaluations in four countries Ms Ghosh-Robinson holds degrees in International Relations and in Law

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The evaluators gratefully acknowledge the unstinting assistance provided to them by members of the staff of OIC Poland -- especially that of Ms Anita Ostep-Karpinska, whose tireless efforts in leading that effort helped ensure successful completion of our complex, time-constrained task

## I. SUMMARY OF MAJOR FINDINGS, CONCLUSIONS AND RECOMMENDATIONS

Within a short time -- and in a nation undergoing rapid societal transformation -- OIC Poland has developed into a Lublin-based NGO with marked success in building the necessary "bridges" to the unemployed, private business, local, regional and national governments, and the NGO community. The linkages are key to democracy building and to economic development.

OIC Poland is rapidly approaching institutionalization. It has a young, innovative and conscientious staff, and is led by an Executive Director skilled in managerial and human resources relationships. Its management controls are professional in quality. Effectively operating are a management information system, standard operating procedure, personnel policies, job descriptions and a detailed, computerized data base. The OIC's critical program documents are used effectively.

Its FY94 Independent Auditors' Report on Compliance with Government Auditing Standards noted that the NGO complied in all material respects to their provisions, and found no matters involving internal control structure and operation considered to be material weaknesses. The OIC submits monthly financial reports to OICI's Finance and Administration Department, which monitors them.

Through 30 April 1995 -- 31.5 months, or 91.3% into the 34.5-month Cooperative Agreement -- OIC Poland program expenditures had reached US\$ 1,463,630, or 89.0% of total budget. At that time, local program costs had reached 82.0% of total budget, and the U.S.-based technical support program had reached 98.1% of total budget -- mainly because of an overage in expenditures for foreign consultants.

Through March 1995, OIC Poland already had exceeded the Logframe Training Outputs of the Agreement's program design in every respect -- having trained or otherwise served almost 9,000 participants, vs. a planned 1,900.

- o Its School Program had trained 291 instructors (vs. a planned 23) to teach its elective course, "Preparing to Enter the Job Market," and by mid-1995 will have trained 3,300 students (vs. a planned 400) at 92 secondary schools.
- o Its Employment Preparation courses for jobless adults had trained 938 (vs. a planned 705) -- including 177 in a special course for women, and 454 unemployed who had been trained by Regional Labor Office trainers, originally taught by the OIC. (Neither of these innovative developments had been contemplated in the project design.)
- o Its Business Services workshops, seminars and individual counseling sessions for business clients had trained twice the 719 originally planned, with the

more recent courses being designed to upgrade the professional skills of employees of larger firms, in addition to the entrepreneurs and small-scale business persons who have been the OIC's traditional business services clients

- o Although computer training was not part of the original program design, OIC Poland had trained 1,351 unemployed, employed and self-employed in a wide variety of courses, from short 20-hour courses in basic computer operation, to -- more recently -- complex, 100-hour to 200-hour workshops teaching marketable professional skills in addition to computer skills

- o Lastly, in another initially unforeseen area -- the promotion of democratic principles, indigenous NGOs and economic development -- the OIC had conducted annual, large-scale conferences and workshops that had focused on it favorable national and international attention, while also conducting smaller specialized seminars on those subjects. In aggregate, OIC conferences and seminars were attended by over 1,600 persons

Based on formulas currently employed by Polish Government officials, it is calculated that -- thanks to the the USAID/OICI Grant Cooperative Agreement -- training by OIC Poland and the subsequent employment history of OIC completers had saved the Polish State the zloty equivalent of US\$ 1,000,000, from the OIC's inception through August 1994. The savings, which have continued to accrue since the latter date, result from (a) decreases in unemployment benefits, (b) reduction in Labor Fund payments, and (c) other reductions to the State's budget

The evaluators' random survey of 21 teachers, directors, inspectors, and other educators using the OIC's elective secondary school program, and of knowledgeable voivodship kuratorium and labor office officials, revealed that the program was highly valued by all those interviewed, and that major improvements have been made in the language and editorial format of the OIC-developed student's workbooks and teacher's guides. However, in the future, if and when an EEC-sponsored and financed similar program is introduced into the schools, there may be serious competition for Ministry of Education financing between the two programs

The evaluators' random survey of 32 completers of OIC Poland's "ABCs of Small Business Creation," "Basics of IBM PC" and "Success on the Job Market" courses revealed that training information provided was new, useful and that knowledge gained through attending the courses was helpful either in job search or current employment/ business operations. The quality of instruction -- especially its motivational aspects -- were key to the positive responses received from the interviewed participants. The evaluators' findings verified, in almost all respect, the validity of the OIC's findings in its own August 1994 "Monitoring" survey of attitudes of clients trained earlier in its history

Because of the initial short-term (two-year term financial support) of the Cooperative Grant Agreement with USAID/EUR, the grantee (OICI) and subgrantee (OIC Poland) have always been conscious of the need to promote speedy program institutionalization and sustainability

The success of the drive towards institutionalization is revealed by the dramatic transfer of knowledge and professionalism from the grantee to the subgrantee through massive, early technical and backstopping support provided to the OIC's Polish staff by skilled OICI consultants, advisors and staff. The opening paragraphs of this summary describe other impressive, positive, end-results of the transfer of know-how to local management and staff

The following data demonstrate initial success in OIC Poland's drive towards sustainability

- o Current and planned client fees Conscious of the need to begin generating income from clients, the OIC, on a test basis, started charging individuals for courses in May 1994. By the time of the evaluation, fees are charged for all non-school courses. Fees charged the unemployed and entrepreneurs are subsidized, to cover half of direct costs (instruction, materials and rent/ utilities), computer-oriented courses are priced to recover all direct costs, and professional courses aimed at upgrading key staff of larger firms are priced at about twice direct costs. Gross revenues from participants of training courses are accelerating rapidly. During the eight months from May-December 1994, they brought in the equivalent of US\$ 10,759, in the first two months of Calendar 1995, they amounted to US\$ 14,192 -- US\$ 10,457 alone from the first OIC course designed for key employees of larger firms, a January 1995 fifty-hour course for 37 personnel managers.

- o Income from non-USAID donors/contributors An incomplete listing of financial and commodity contributions related to OIC Poland's program costs indicates a non-USAID total to date of the equivalent of US\$ 131,060. The total includes the equivalent of US\$ 71,494 from international donors (the largest World Bank, Johns Hopkins Institute for Policy Studies, and Partners for International Education and Training, US\$ 58,104 (an insufficient amount) from Polish public entities (regional labor offices, development agencies, kuratoria, schools) and radio stations, and US\$ 1,462 from the Polish private sector. To date, the OIC's resource mobilization drive has not matched the success of its program to generate income for the program.

To ensure attainment of its institutionalization and sustainability goals, OIC Poland requires action and support from two organizations

- 1 A speedy decision by USAID Warsaw to institute financial support pursuant to the lines of, and at the level elaborated in, OICI's 6 February 1995 "Grant Proposal OIC Poland Program to Support Private Sector and NGO Development" The OIC's current funding, through Cooperative Agreement EUR-0032-A-00-2085, ends on 30 September 1995, a little over three months from the time this evaluation report was completed.

- 2 A continuation of modest know-how and backstopping support from OICI In line with (a) current USAID Warsaw strategy, (b) the increased professionalism of OIC Poland's management and staff, (c) OICI's policy of phasing out backstopping assistance in proportion to an affiliate OIC progress towards institutionalization and sustainability -- and (d) under terms of the Grant Proposal before USAID Warsaw -- OICI's technical support is to concentrate on

- o Assistance in resource mobilization, through OICI's networking with international donors in Europe and the U S , liaison activities in Washington DC, and arranging U S study tour(s) to train OIC staff in proposal writing
- o Arranging study tours abroad for other OIC personnel
- o Technical support in recruiting needed foreign consultants and specialists for OIC Poland
- o Periodic technical assistance and staff training in financial manage-

ment per U S Government regulations, and in Board and staff operations training

The last chapter of this report features an annotated compendium of significant lessons learned (including several not yet acted-upon) during the course of the USAID/OICI Cooperative Grant Agreement

## II. PROGRAM BACKGROUND

### II-A THE GENESIS OF OIC POLAND, U S GOVERNMENT GRANTS

OIC Poland's creation was sparked by an address by OIC International's then-President at the March 1990 "First Polish-American Conference on Self-Help," held in Gdansk. Shortly thereafter, representatives of Solidarity's Lublin Regional Office and others of the Lublin region community started working with OIC International to form an indigenous Polish NGO in the area -- an undertaking that, in September 1991, resulted in the formal establishment of OIC Poland as an independent Polish foundation.

In December 1991, through the initiative of the Labor Attaché of the American Embassy at Warsaw, the U S Department of Labor provided OIC International one-year's funding of \$166,187 (under Grant Agreement E-9-5-2-0011) to conduct feasibility studies and initial in-service training aimed at improving OIC Poland's ability "to develop employment and self-employment opportunities in the (Lublin) economy."

In January 1992, OIC Poland established its legal "Foundation" existence and OIC International conducted an initial training program for the Board of Directors. The OIC opened a small program office in February 1992, with a management staff of two.

On 15 September 1992, USAID/EUR/DR/DPI and OICI signed the two-year Cooperative Grant Agreement EUR-0032-A-00-2085-00 which enabled OIC Poland to initiate actions to meet its aim of contributing "to the Government of Poland's goal of improving the life of the Polish People by reducing unemployment through economic development, appropriate skills training and employment services."

A 15 September 1993 Amendment to the Cooperative Grant Agreement provided funding of \$89,967 for OIC Poland to conduct a Regional PVO Lessons-Learned Workshop,\* thereby increasing the Agreement's total to \$1,644,342. Initial funding under EUR-0032-A-00-2085-000 arrived late at OIC Poland, delaying its hiring of administrative and instructional staff until spring 1993 and its occupation of an office with training facilities until June 1993. However, once the NGO became fully operational, it moved rapidly to initiate its contractual obligations to USAID. The initial phase of OIC Poland's activity was the object of an external Mid-Term programmatic Evaluation conducted on behalf of USAID/EUR/DR/DPI and OIC International in December 1993/January 1994. After discussing the program's outputs at that time, the Evaluators noted that:

"Behind OIC Poland's unexpectedly rapid progress lie several forces that have acted synergistically to produce an unusually dynamic result. They include, but are not

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\* The "Lessons-Learned and New Directions Workshop -- NGO Development in Central and Eastern Europe" held in Lublin on 8-13 November 1993 is widely reportedly to have been a success. Its aims, participant breakdown and major topics are described in Chapter V-A of this report.

limited to (a) an initial impetus and continuing support from various elements and individuals of the Solidarity movement, (b) the managerial and human relations skills of an exceptionally hard-working Executive Director, (c) the energy, broad scope of activity and resource mobilization talents of OICI's Program Advisor, (d) expert counsel, guidance and technical support provided by OICI-funded consultants working with the program, (e) a young, creative and conscientious staff, (f) a closely involved Board of Directors, and (g) knowledgeable backstopping of the program by AID/Washington's Project Officer "\*\*

To help compensate for the late start, the Cooperative Agreement was modified on 29 August 1994 to extend its completion date to 31 July 1995, with the obligated amount remaining unchanged

Figure 1, next page, compares planned versus actual expenditures for USAID/OIC International Cooperative Grant Agreement EUR-0032-A-00-2085-00 from 15 September 1992 inception through 30 April 1995. As of the latter date, with 31.5 months, or 91.3% of the 34.5-month Grant period already completed, the following percentages of authorized line-item expenditures had been spent:

- o \$1,463,630, or 89.0%, of total Grant funds of \$1,644,342,
- o \$763,150, or 82.0%, of planned Local Program costs of \$930,594,
- o \$700,480, or 98.1% of planned TCT Program [U.S.-based] costs (mainly for foreign consultants, Program Advisor, participants, and travel/transportation) of \$713,748,
- o \$354,141, or 69.0% of planned Personnel costs of \$512,937,
- o \$430,739, or 117.3% of planned Consultants costs of \$367,248 (reflecting a 27.4% underage in cost of Polish Consultants and a 22.4% overage in cost of Foreign Consultants [see Figure 2, for additional details]),
- o \$166,301, or 92.4% of planned Travel & Transportation costs of \$180,023,
- o \$262,583, or 86.3% of planned Other Direct Costs of \$304,347,
- o \$125,879, or 92.8% of planned Commodity/Equipment costs of \$135,623,
- o \$123,987, or 86.0% of planned Participant Costs of \$144,164

Because of Poland's four-decades-plus, post-World War II existence under Communist domination, few of OIC Poland's young, indigenous staff had hands-on (or, in most cases, even theoretical) knowledge of market-economy practices and techniques, at program start-up. The subjects simply had not been taught in the nation's universities and faculties of economics. For that reason, the Project Design for the USAID/EUR Grant -- a program concentrating on assisting business persons and preparing the unemployed to cope successfully with the new forces unleashed during the period of transition -- called for massive, initial infusions of specialized know-how on the part of foreign (mostly American) consultants and advisors. The \$329,892 allocated for the services of that category of specialist equalled 20.1% of the total \$1,644,342 USAID Grant.

The transfer of technology, from foreign consultants/advisors to OIC Poland's receptive management and instructional staff, has been rapid during the new program's operation. The transfer was further accelerated by a series of short program-financed study-tours that sent key OIC trainers to the U.S. for hands-on instruction, and, to a lesser extent, an increase in the availability and use of Polish consultants/advisors with required expertise.

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\* Mid Term Evaluation of OIC Poland's Program of Humanitarian/Development Assistance and Services to Help the Unemployed and Self-Employed, January 1994

Figure 1 USAID/OIC INTERNATIONAL COOPERATIVE AGREEMENT  
GRANT, PLANNED VS ACTUAL EXPENDITURES, FROM  
INCEPTION THROUGH 30 APRIL 1995

OIC International, Inc

Pipeline Analysis

USAID Grant - Poland

Grant No EUR 0032 A 00 2085 00

From inception to April 30, 1995

Line Item Expenditure	Local Program			TCT Program			Local and TCT Program Totals		
	1	2	(1 2)	1	2	(1-2)	1	2	(1 2)
	Total Grant 9/15/92 7/31/95	Cummulative Expenditures 9/15/92 4/30/95	Grant Balance as of 4/30/95	Total Grant 9/15/92 7/31/95	Cummulative Expenditures 9/15/92 4/30/95	Grant Balance as of 4/30/95	Total Grant 9/15/92 7/31/95	Cummulative Expenditures 9/15/92 4/30/95	Grant Balance as of 4/30/95
Personnel	457 937	354 141	103 796	55 000	0	55 000	512 937	354 141	158 796
Consultants	37 356	27 106	10 250	329 892	403 633	(73 741)	367 248	430 739	(63 491)
Travel & Transportation	42 823	31 265	11 558	137 200	135 036	2 164	180 023	166 301	13,722
Other Direct Costs	264 355	228 860	35 495	39 992	33,723	6 269	304 347	262 583	41 764
Commodity & Equipment	128 123	121 778	6 345	7 500	4 101	3 399	135 623	125 879	9 744
Allowances	0	0	0	0	0	0	0	0	0
Participants Costs	0	0	0	144 164	123 987	20 177	144 164	123 987	20 177
Infrastructure	0	0	0			0	0	0	0
<b>Totals</b>	<b>930,594</b>	<b>763,150</b>	<b>167,444</b>	<b>713,748</b>	<b>700,480</b>	<b>13,268</b>	<b>1,644,342</b>	<b>1,463,630</b>	<b>180,712</b>

Note

Cumulative Expenditures (Column #2) represent preliminary figures subject to audit adjustments. These figures include accruals for the last month (1) of the reporting period.

Figure 2 OIC POLAND, COSTS OF FOREIGN AND POLISH CONSULTANTS FY 1993 THROUGH APRIL 1995 (in U S Dollars)				
	First 12-1/2 Months (9/15/92-9/30/93)		Next 19 Months (FY '94 thru 4/95)	
	\$	%	\$	%
FOREIGN CONSULTANTS	\$157,784	96.5%	\$245,849	92.0%
POLISH CONSULTANTS	5,726	3.5%	21,380	8.0%
TOTALS	\$163,510	100%	\$267,229	100%

Sources First 12-1/2 months, from OIC Poland Mid-Term Evaluation Report the next 19 months then deduced from Figure 1's inception through 30 April 1995 totals

Figure 2, above, indicates that OIC Poland's use of foreign consultants/advisors remained consistently high as the Program has progressed. During its first 12-1/2 months, the cost of U S and British consultants/advisors was \$157,784. During the following 19 months (FY94 thru April '95) -- a period approximately 50% longer -- their cost was \$245,849. On an annualized (12-month) basis, expenditures during the earlier period were \$151,473 for foreign consultants/advisors, while for the later period, such costs annualized at a similarly high \$155,278.

During the same two-and-a-half-year period, the OIC's Polish consultant costs increased dramatically -- rising from the zloty equivalent of 3.5% of total consultant costs during the earlier period, to the zloty equivalent of 8.0% of total consulting costs during the later, longer period. On an annualized basis, the OIC's expense for Polish consultants rose from \$5,497 during the earlier period to \$13,504 for the later period -- an increase of 146% from period to period.\*

## II-B THE OIC'S ROLE IN A POLAND UNDERGOING TRANSFORMATION

During the past five years, the people of Poland have embarked on a dramatic transition from their former Communist experience. The basis for a democratic civil society has been constructed, as has been the new model of the State in which self-governing structures and organizations play a growing role. The solid basis for the market economy has been created and the process of privatization begun. Already, the private sector employs about 60% of the total work force, with 35% working in the non-agricultural sector. The share of the private sector in the production of Poland's Gross National Product is growing, for the past two years, it has been in the 4% to 5% range.

\* The wide disparity between hourly fees charged by foreign consultants and Polish consultants whose activity is quantified in monetary terms in Figure 2 distorts their comparative levels-of effort. Hourly fees of American and British consultants averaged approximately \$31.25, through FY93 and FY94. As late as the March-April 1995 visit of the End-of-Project Evaluators to OIC Poland the Program was paying Polish computer and small business instructors 12 zlotys to 15 zlotys per hour -- then the equivalent of \$5.11 to \$6.38. In other words Polish consultants have had to work for five-and-a-half hours to equal the hourly rate paid to foreign counterparts.

It is current USAID Warsaw policy that grantees and contractors use of local consultants be encouraged and that use of foreign consultants be discouraged.

Thanks largely to private sector growth, the rate of unemployment -- admittedly at a high 16% -- has stopped growing and, indeed, is starting to decrease. As of mid-April 1995, the number of employers and self employed total more than 3,500,000.

The negative aspect of the transformation was not only the growth of unemployment, but also the widening sphere of poverty and low standard of living of about 14% of the Polish population. Although family income has again started to increase since 1993 -- promotion of private sector development, increasing peoples' work qualifications, and growth of multi-profile education are needed to accelerate the improvement. Organizations like OIC Poland, which reach the inhabitants of smaller cities, towns and villages, can play an important role.

Because the problems of transformation within Polish society call for a daily regimen of creative problem solving, OIC Poland, from its inception, evolved a careful, thoughtful strategy to address these problems and build an internal capacity to meet the specific challenges of unemployment, educational reform, small enterprise development and the building of a democratic civil society. The OIC has developed a Lublin-based entity that has begun building the necessary "bridges" among business, government and the NGO community throughout Poland, and has employed a high quality staff with a deep commitment to a standard of excellence for themselves, their program services, and their clients. The OIC's indigenous boards and staff -- assisted by OIC International -- initiated the critical program development and operational strategies that have fueled OIC Poland's progress during the Grant from USAID/EUR. It was, in fact, that combination of OICI and the OIC's skills which has built the Polish NGO that is judged so positively by both Polish and American observers.

OIC Poland has been and will continue to be a key partner in the Lublin Voivodship (Province) and throughout Poland, as it strengthens its capacity to deliver national as well as local services.

- o Already, the results of its work with educators in various voivodships have demonstrated that the OIC's Employment Preparation Course for secondary school students has answered national needs for new curriculum, teacher and managerial training to motivate Polish youth and prepare them for new employment and business-development opportunities. (See Section III-A of this Report.)
- o The cooperative relationship that OIC Poland has developed with Regional Labor Offices has provided an invaluable framework for training the unemployed that has brought new hope and skills to large numbers of displaced workers in Lublin and other regions. (See Sections III-B and III-C of the report.)
- o And importantly, the business community, which has begun to benefit from OIC's key sustainability building-block -- its Business Advisory Services Program -- has begun recognizing the value of OIC Poland's NGO role, and has been increasingly attracted to its program offerings (see Chapter IV, following.) Hence, the OIC has now moved forward in a new area -- the introduction of a fee-for-services program to generate a significant level of income from business clients (detailed in Section IX-B of the report).

Figure 3, on the next two pages, summarizes OIC Poland's Program Design "Outputs" in terms of training completions -- plan vs actual -- through March 1995. The Figure indicates that the OIC has exceeded "End-of-Project Plan" in all five main areas of activity.

	<u>PLAN</u>	<u>ACTUAL</u>
A School Program for Secondary School Students	453	3,665
B Employment Services/Job Market Courses	705	938
C Business Training and Other Business Services	719	1,408
D Computer Training	0	1,351
E Conferences/Workshops & Seminars Promoting Democracy, NGOs and Economic Development	0	1,606
	<u>1,877</u>	<u>8,968</u>

Activities (D) and (E) were not part of the original project design, hence they indicate zero for numbers of planned completers. The details of OIC Poland's performance-to-date regarding each activity area are reviewed in the Chapters III, IV and V of this report.

Figure 3 TRAINING COMPLETIONS (Outputs), OIC POLAND, PLAN VS ACTUAL, THROUGH MARCH 1993

A SCHOOL PROGRAM (Output I a)	PLAN	ACTUAL
Trainers Trained to Teach OICP's Course Preparing to Enter the Job Market (16 hrs)	23	291
Student Completers of OICP's Course -- at 92 Schools (70 hrs)	400	3 300 (a)
Working with Teachers -- for Headmasters	30	21
Role of the School in Preparing Youth to Enter the Job Market	0	53
	453	3 665
B EMPLOYMENT SERVICES/JOB MARKET COURSES (Output I a)		
Workshop to Train Labor Office Trainers to Teach Course for the Unemployed (24 hrs)	0	15
Success on the Job Market for Unemployed--Taught at OICP (15 hrs)	650	224
Success on the Job Market for Unemployed--Taught at Labor Offices by OICP-Trained L O Teachers (12 hrs)	0	454
Success on the Job Market for Women Seeking Employment (20 hrs)	0	177
Success on the Job Market for Handicapped Seeking Employment (16 hrs)	30	41
Workshop to Train Trainers of the Handicapped to Teach the OIC Course (18 hrs)	25	27
	705	938
C BUSINESS SERVICES (Output I c)		
Workshops ABCs of Small Business Creation at OICP (24 hrs)		320
ABCs of Entrepreneurship in Swidnik for Labor Office		15
ABCs of Entrepreneurship for Bilgoraj Regional Development Agency		15
Motivation Course for Trainers of Lodz Employees Who Face Job Loss		6
Specialized Workshops Taxes and the Tax Department (15 hrs)		89
Specialized Workshops Marketing in Small Businesses (10 hrs)		35
Specialized Workshops Legal Bases of Small Business Operations (10 hrs)		18
Specialized Workshops Managerial Accounting (24 hrs)	649	48 (b)
Specialized Workshops, Small and Medium Enterprise Strategy (15 hrs)		15
Specialized Workshops Basics Credit Principles (10 hrs)		21
Human Resources Management Training for Larger-Firm Personnel Departments (50 hrs)		39
Workshop for Consultants/Advisors to Small and Medium Enterprises (30 hrs)	0	26
Marketing Seminar for Businessmen from Belarus (32 hrs)	0	20
Seminar Cooperation Between Polish and Belarus Enterprisers	0	64

(continued)

(a) As of the end of the 1994-1995 School Year

(b) These are Objectively Verifiable Indicators (OVIs) quantified in the "Purpose" Section of the Logframe. Other "Plan" totals indicated in the Figure are "Outputs" OVIs.

Figure 3 TRAINING COMPLETIONS (Outputs) OIC POLAND, PLAN VS ACTUAL, THROUGH MARCH 1995 (Continued)		
	PLAN	ACTUAL
Business Incubator Workshop at Lublin	0	25
Business Incubator Study Tour Seminar	0	18
Lectures at the Lublin New Business Club	0	69
Workshops for Business Associations	70	0 (b)
Individual Counseling Sessions with Business Clients	0	565
	719	1 408
<b>D COMPUTER TRAINING</b>		
Basics of the IBM Personal Computer (20 hrs)	0	1 131
Basics of the IBM Personal Computer for the Handicapped (20 hrs)	0	11
*Word for Windows (20 hrs)	0	40
Finance Accounting Course (108 hrs)	0	38
Personnel Salaries and Office (30 hrs)	0	25
Secretary - Personal Assistant Course (200 hrs)	0	32
Computer and Motivational Training Course for Regional Labor Offices (94 hrs)	0	74
	0	1 351
<b>E PROMOTING DEMOCRATIC PRINCIPLES THE ROLE OF NGOs AND ECONOMIC DEVELOPMENT</b>		
Sept 1992 Conference on the Role of NGOs in Promoting Economic Development co-financed by OICP and U S Peace Corps	0	87
Nov 1993 Lessons Learned and New Directions Workshop on Roles of NGOs and PVOs in collaboration with and with financial support of AID/Washington	(c)	60
Sept 1994 Polish Workforce 2000 Conference to Improve Business Performance Through Better Human Resources	0	120
Seminars on The Business Incubator as a Community Institutional Support in Warsaw (Nov 92) Lublin (Feb 93) and Cracow (April 1993) co-financed by the U S Peace Corps	0	119
LEDA Conference for Leaders of Local Communities Lublin May 1993 in collaboration with the EEC's Cooperation Fund	0	27
Conference on Economic Transformation of Poland Lublin May 1993 in collaboration with the Catholic University	0	300
Continuing Series Workshops on Local Stimulation of Rural Areas in the Ciemiega Valley	0	270
Seminar on Pro-Ecological Education of Rural Areas in the Ciemiega Valley Program	0	25
Seminar on Entrepreneurial Sectors of the Lodz Region	0	65
Seminar for Local Community Leaders	0	33
Seminars on Restructuring the Polish Economy -- Theory VS Practice at the Catholic University	0	300
Seminar on Why Farmers Organize Office of the Lublin Voivodship	0	200
	0	1 606

(c) OIC Poland received separate funding under Amendment No 1 to Grant EUR 0032 A-00 2085 for the November 1993 "Lessons Learned/New Directions" Workshop

Part One:

PROGRESS AND CURRENT STATUS  
OF KEY PROGRAM INITIATIVES

### **III. EMPLOYMENT PREPARATION SERVICES**

Pursuant to Output 1 a of the Logical Program Design Framework (Logframe) of the operative USAID/OIC International Grant Agreement, OIC Poland conducts a series of employment preparation services for the jobless and the potentially unemployed. This Chapter reviews, in order, the three major facets of those services: (A) the OIC's elective course to prepare secondary school students to enter the job market, (B) the OIC's workshops for unemployed adults and their trainers, and (C) its special workshops for women and the handicapped.

#### **III-A PREPARING SECONDARY SCHOOL STUDENTS TO ENTER THE JOB MARKET**

##### **Development and Implementation of the Employment Preparation Course**

OIC Poland transforms concepts into tools, and tools into changed behaviors and attitudes critical to the development and sustainability of a free market economy and democratic principles. Its work in Polish secondary schools demonstrates this approach. First, it provides schools with a curriculum which is a tool to teach employment skills. Second, and perhaps more importantly, it initiates the process of changing attitudes -- by defining a new way to learn and work -- that motivates youth to progress better in a free market economy.

Curriculum development for OIC Poland's "Employment Preparation Course" for secondary school students included: (a) design of the model by an OICI American consultant, (b) close OIC work with school teachers, principals and students, the voivodships (provinces) and elements of the Ministries of Education and of Labor and Social Policy to adapt the curriculum to Polish conditions, and (c) a long period of pilot-testing the subsequently modified versions of the curriculum in the classroom setting, in cooperation with educational authorities at the voivodship levels. The OIC's second initiative of preparing comprehensive student workbooks and teacher's guides was met with enthusiasm by students, teachers, voivodship methodological centers and voivodship labor (employment) offices. As a result the secondary school program has proliferated far beyond originally conceived Logframe Outputs.

Figure 4, below, demonstrates its widespread implementation: (1) by March 1995, OIC Poland had trained 291 teachers to teach the course -- almost 13 times the projected number, (2) by the end of the '94-'95 Academic Year, 3,300 students in 92 different schools will have completed the course -- instead of an anticipated 400, (c) the OIC conducted a planned course for school principals, and (d) 53 participants had attended an

unplanned workshop on the secondary school's role in preparing youth to enter the job market

Figure 4 TRAINING COMPLETIONS (OUTPUTS), OIC POLAND'S SCHOOL PROGRAM, PLAN VS ACTUAL, THRU MARCH 1995		
	PLAN	ACTUAL
Trainers trained to teach OIC Poland's Course, "Preparing to Enter the Job Market" (16 hrs)	23	291
Secondary School Student Completers of OIC Poland's Course (70 hrs) – at 92 schools	400	3,300*
Course for Principals, "Working with Teachers"	30	21
"Role of the School in Preparing Youth to Enter the Job Market"	0	53
* As of end of the '94-'95 School Year	453	3,665
Source OIC Poland completions data		

### The Teacher Training Process

OIC Poland exerts major efforts to train teachers for participation in its school program. Since its inception, the head of the school program unit, assisted by teachers most advanced in implementation of the program, has conducted 11 training courses in seven voivodships that involved 275 teachers and 16 vocational counselors employed in labor offices. This has placed a significant burden on the time and energy of the school program unit's head (and sole member of that unit).

Recommendation Training is a crucial element of the program. However, there has been an imbalance between direct teacher-training sessions and school-program promotional activities in favor of the former. There are three potential solutions to the problem:

- o Limit the personal involvement of the school program unit's head in training and have her spend more time on certain promotional activity, i.e., seeking approval of the program by the Ministry of Labor and Social Policy, in expansion of the program outside schools, in monitoring, etc. (the unit's head is its only staff member),
- o Have another OIC Poland staff member, e.g., its Public Relations Officer assume the aforesaid task, and/or
- o Employ additional staff in the school program unit

### Nature and Extent of OIC Poland's Employment Preparation Course

The OIC's Employment Preparation Course is a 70-hour elective that consists of two hours of instruction per week for the 35 weeks of the secondary-school year. It consists of three primary subject areas. One concentrates on self-assessment regarding the demands of the world of work -- motivating the student to develop self confidence and needed skills, and career planning. The second area focuses on job-finding information, completion of job-application forms and resumé's, and handling the job interview. The third covers the free market system. Teachers find the first two subject areas the most exciting, they apply them widely to other subjects in addition to OIC's Preparing to Enter the Job Market course -- using them during special tutoring courses and trade-skills classes. Teachers consider them important for internal integration of student groups and for improvement of the student-teacher relationship.

Recommendation Separating the OIC course into integral modules might help teachers whose student profile suggests it might be preferable to concentrate on the

first two subject areas (and eliminating, for example, the private enterprise system area), and would not pose a problem to most teachers, who would want to implement the whole program

Figure 5, next page, lists the major categories and subject-matter of each daily lesson in OIC Poland's Employment Preparation Course for secondary school students

Figure 6, on the same page, lists, by voivodship, the number of students (2,880), schools (76),\* and types of secondary institutions (62 vocational schools, 10 comprehensive schools and 4 agricultural schools) where the elective Employment Preparation Course was being taught as of April 1995

In 1994 a major effort was made by OIC Poland to improve the terminology and editorial form of the course's books. They were given new, elaborate layouts and printing errors were eliminated. In August 1994, the revised editions were published: 2,000 teacher's guides and 5,000 student workbooks.

### **Evaluation of the Program by its Beneficiaries**

Direct beneficiaries of OIC Poland's Employment Preparation Course consist of teachers, school principals/directors, students and educational authorities.

Using terminology similar to that reported by January 1994 Mid-Term Evaluation interviewees, all teachers and school principals interviewed by the End-of Project evaluators gave the OIC program outstanding grades. The favorable opinions were confirmed by Kuratoria\*\* in Lublin and Zamosc. Educators acknowledge that the course offers students preparation for independent life in the interpersonal context as well as in the professional sense. Voluntary participation builds a good learning atmosphere during the classroom sessions, integrates student activity and establishes new bonds between students and teachers. The course instructs participants how to deal with stress and failure, how to assess impartially their individual prospects and capabilities, and how to take maximum advantage of their own assets.

The techniques teachers apply in the program favorably influence their attitude towards students. It becomes more personal, based on give-and-take and not formal dictates. A majority of teachers prefer that the program maintain its present voluntary character, that it continue as a partnership between students and instructors, that it involve only interested students, and that it avoid being based on formal grades.

All interviewed teachers wish to continue using the OIC-developed course. That also is the intention of Kuratoria in Lublin and Zamosc, both of which propose to extend the scope of the program: in Lublin, to 27 schools in Academic Year '95-'96, and in Zamosc to 11 schools (i.e., all secondary schools in the Voivodship). OIC Poland's files contain 11 letters from participating schools which praise the teacher's guide and the training methodo-

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\* It will be noted that Figure 4's total of 92 secondary schools having conducted OIC Poland's Employment Preparation Course since its inception exceeds Figure 6's 76-school total conducting the course in April 1995. Schools occasionally have to drop the elective course when they cannot continue raising locally the funds to pay instructors to teach the course. This is especially true in the case of agricultural schools for which the voivodship's kuratorium does not fund such salaries. The problem is discussed later in this subsection.

\*\* Kuratoria are voivodship (province)-level administrative education offices. Kuratorium is the singular of kuratoria.

Figure 5 MAJOR CATEGORIES AND DAILY LESSON SUBJECT MATTER OF OIC POLAND'S "EMPLOYMENT PREPARATION COURSE FOR VOCATIONAL SECONDARY SCHOOL STUDENTS"

**A SCHOOL RELATED ACTIVITIES**

- 1 Making the Best of School
- 2 Being Confident
- 3 Developing Self Confidence
- 4 Writing Skills
- 5 Reading Skills
- 6 Listening Skills
- 7 Counting Skills

**B PRIVATE ENTERPRISE SYSTEM**

- 1 How Economic Systems Work
- 2 A Market Oriented System
- 3 Supply/Demand
- 4 Curriculum Flow of Economic Activity
- 5 Wants and Needs
- 6 Economic Growth and Government's Role in Economic Affairs
- 7 The Effects of the Environment
- 8 Achieving Economic Goals
- 9 Education and Economic Growth
- 10 Analysing Human and Economic Resources
- 11 The Manpower Market Workers and Jobs
- 12 Goals of Management and Labour

**C THE WORLD OF WORK**

- 1 Why Work?
- 2 Individual Interests Abilities and Skills
- 3 Deciding What Is Important
- 4 Identifying Values
- 5 Individual Values and the Choice of Job
- 6 Overcoming Limitations
- 7 Differing Lifestyles
- 8 Skilled and Unskilled Workers

**D JOB FINDING INFORMATION**

- 1 Interviewing Workers to Get Career Info
- 2 How to Find a Job
- 3 Analysing Job Description

**E CAREER PLANNING**

- 1 Exploring Possible Careers
- 2 Evaluating One's Abilities
- 3 Problems with Career Planning
- 4 Importance of Personality

**F RESUME APPLICATION FORM AND INTERVIEW**

- 1 Personal Information for Completing Application forms
- 2 Identifying References
- 3 Preparing a Resume
- 4 The Actual Interview
- 5 Being Rejected

**G ON THE JOB SKILLS**

- 1 Getting Along with Coworkers
- 2 Employer Expectations
- 3 Employee Performance Appraisals
- 4 Personal Health/Grooming Habits
- 5 Personal appearance in the Workplace
- 6 Time Management
- 7 Punctuality
- 8 Giving Instructions
- 9 Following Instructions
- 10 Respecting Authority
- 11 Coping with Frustration
- 12 Occupational Safety
- 13 Values Employers Expect from Employees
- 14 Learning to Make Decisions
- 15 Being a Valuable Employee
- 16 Working as a Team Member
- 17 Being Honest
- 18 Keeping a Job
- 19 Changing Negative to Positive Actions
- 20 Giving and Accepting Helpful Criticism
- 21 Completing a Task
- 22 Interrelationships in the Work Environment
- 23 Payment for Work
- 24 Resigning from a Position

Figure 6 DATA RE EXTENT OF OIC POLAND'S SCHOOL PROGRAM, ACADEMIC YEAR '94/'95

Voivodship (Province)	Total No Students	Total No Schools	Vocational Schools	Comprehensive Schools	Agricultural Schools
Sieradz	834	23	15	8	0
Lublin	530	20	16	0	4
Rzeszow	483	2	2	0	0
Lodz	300	10	9	1	0
Zamosc	300	5	5	0	0
Walbrzych	130	2	2	0	0
Biala Podla	105	5	5	0	0
Wroclaw	50	1	1	0	0
Koszalin	48	3	3	0	0
Przemysl	45	2	2	0	0
Katowice	34	2	2	0	0
Gorzow	21	1	0	1	0
<b>TOTAL</b>	<b>2880</b>	<b>76</b>	<b>62</b>	<b>10</b>	<b>4</b>

logy developed for their teachers. OIC files also contain questionnaires completed by students of a Bilgoraz school who rate very favorably the program's concept, teaching methods and the applicability of the classes to their pursuit of personal goals.

### **The OIC's Promotion Efforts to Expand Use of the Course**

OIC Poland targets its promotion at teachers and school principals, voivodship kuratoria and the Ministry of Education, institutions servicing the unemployed (Ministry of Labor and Social Policy, vocational counseling centers, job centers, etc.), and potential donors. During 1994 and 1995:

- o The OIC responded to inquiries from teachers and principals of over 150 schools by detailing the objectives and scope of the program and the outlines of a specific plan to integrate the school into the network of beneficiaries.
- o The head of its school program unit personally made detailed presentations covering the program at five periodic teacher/school principal meetings organized by educational and labor office authorities in four voivodships -- passing along data concerning the course to several hundred persons. The OIC's Public Relations Officer also presented the program at two conferences.
- o The program was covered in local newspapers, on local and national radio and television stations and at schoolbook fairs, and the OIC distributed complementary copies of workbooks and teacher's guides to 31 educational institutions and libraries.

Currently, OIC Poland's main emphasis is on direct promotion of the school program to educational institutions and authorities potentially interested in its implementation. Actual implementation of the program and its favorable appraisal by teachers are the bases for all other promotional efforts.

### **Recommendations**

1. OIC-inspired articles in the professional press regarding objectives and progress of its school program will develop further interest among groups dealing with school curricula, academics, schoolbook authors, officers at the Ministry of Education and other agencies responsible for school curricula.
2. OIC Poland should encourage teachers who are implementing the program to describe their experiences in educational magazines and publications serving the labor/employment market.
3. An informational letter on the school program currently is mailed to interested parties who approach the OIC. More pro-active and systematic promotional efforts are needed. The data provided inquirers would be stronger if developed in the form of an informational brochure that is regularly distributed among kuratoria, teaching methodology centers, and voivodship and regional labor offices.
4. Closer cooperation between the head of OIC Poland's school program unit and its Public Relations Officer is needed. The cooperation should concentrate on more intensive presentation of the program in the media, with periodic press releases that are widely circulated in various regions of the country.

## **Financing the OIC Poland Secondary School Program**

Only during the start-up period of program implementation did OIC Poland finance the cost of student workbooks and teacher's guides. For the last two years, teachers have been paid by voivodship kuratoria or schools themselves. The workbooks are paid for by students' parents, schools or labor offices. In agricultural schools, which are not under kuratoria administration, teachers are paid by schools themselves or respective departments of voivodship offices.\* Teacher training has been financed by external institutions: kuratoria, voivodship and regional labor offices, schools and advisory centers for teachers.

The problem of financing books and teachers' remuneration still remains the primary barrier to implementation of the program in a number of schools. Kuratoria budgets are quite limited, particularly with respect to non-compulsory courses. Price of the workbooks can be a barrier for students' parents, particularly in poorer areas (e.g., villages and small towns). For some parents, even the purchase of books for compulsory courses poses a problem.

## **Possibilities for Broadening the Group of School Program and Schoolbook Users**

The contents of OIC's school program could be applied in vocational counseling and the activities of job centers, rather than -- as at present -- being confined to the education of secondary school students. Vocational counselors in regional and voivodship labor offices and counseling centers under supervision of the Ministry of Education could make use of certain elements of the OIC program in individual and group counseling sessions they provide to young clients. Similar applications would be possible in job centers. These suggestions were made to the evaluation team by representatives of the Voivodship Labor Office in Gdansk. The Voivodship Labor Office in Zamosc also believes that the OIC program's workbooks would be useful in job centers and to vocational counselors. (The Zamosc Voivodship Labor Office has purchased a full set of OIC materials for five job centers under its control.) A Gdansk Labor Office representative deems the motivational/psychological and job-seeking elements of the OIC course best for such purposes. The Deputy Director of the Zamosc Voivodship Labor Office believes that its job centers should use all elements of the OIC curriculum in their work.

### Recommendations

- o That OIC Poland conduct systematic research to discover which of the six portions (i.e., world of work, information on the job search, planning your vocational career, skills in work, how to prepare the resumé and application form, and for the job interview, and the private enterprise system) of its school program would be of greatest interest to the above-mentioned audiences. The six portions could be published in the form of separate brochures, or an editorial series.
- o That the OIC promote such publications among potential new target groups: vocational counselors and job centers and contact the Association of Job Centers Leaders, and the 50 or so regional development agencies throughout Poland, for help in identifying other potential non-school target groups for the material.

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\* The average salary cost for an instructor teaching OIC Poland's 70-hour course is 350 zlotys (5 zlotys/hour times 70 hours) the equivalent of approximately \$US150.

## **OIC Efforts to Obtain Approval of its School Program by the Ministry of Education**

OIC Poland representatives have met several times with Ministry of Education officials seeking approval for the program to become a compulsory course in secondary vocational schools, and the issue was raised before the Parliament in 1994 -- so far to no avail

Ministry officials have suggested that (a) the Ministry deems several other programs could served the same purpose, (b) the European Union, as part of the MOVE PHARE program, finances development of a similar program and its eventual implementation in 60 schools, (c) the Ministry is convinced of the merit of introducing such programs to schools, but its preferences aim at individual local and regional programs and in tailoring curricula to the specific problems of specific regions, (d) the Ministry appreciates the important role of NGOs in the development, promotion and implementation of such programs, but (e) the Ministry does not intend to finance cost of such programs from its restricted central budget resources and recommends that schools seek additional funds elsewhere for that purpose

The Lublin Educational Officer (Kurator) reports that six schools in the voivodship presently implement the MOVE program. As a part of that program, a course, "Entering a Labor Market," now being developed, is similar in character to OIC Poland's course. The status of both courses (OIC's and MOVE's) is similar -- both are elective courses of similar content, neither has secured financing for the teachers' remunerations, and both must seek additional local funds, primarily from regional labor offices. In the future, when the MOVE course is fully developed, it may offer serious financing competition for OIC's. (NB, in a worst-case situation, should the Ministry eventually accept the MOVE course as compulsory in schools, the OIC course would be eliminated from competition.)

OIC Poland should clarify this issue, as well as potential problems posed by other programs, reportedly of similar nature, in other parts of Poland. Hence, the OIC might consider organizing a workshop in the near future involving representatives of organizations implementing those programs, in order to exchange ideas and experiences, and to develop a common strategy towards the Ministry of Education, the Ministry of Labor and Social Policy, and other partners.

A broader promotional campaign targeted at both Ministries is necessary -- through articles in the professional press, information presented regularly to the Ministries regarding the progress of the strikingly successful reception and implementation of OIC's school program, and the positive evaluations of the OIC's program conducted by its users. OIC Poland also will find it advisable to establish closer relations with the MOVE PHARE program.

### **III-B WORKSHOPS FOR UNEMPLOYED ADULTS AND THEIR TRAINERS**

OIC Poland's "Success on the Job Market" workshop for unemployed adults contains many of the elements present in its "Preparing to Enter the Job Market" course for secondary students who hope shortly to find and begin work in the private or public sectors. The course is 15-hours long and consists of three separate five-hour modules. The first, which concentrates on getting to know one's self and recognize the realities of one's occupational plans, includes tests to examine one's personality features and occupational preferences as an employee, and the art of planning and organizing one's own time. The second module teaches methods of job search, including conventional and

modern methods, developing a resumé and letters of job application, and telephone techniques. The last module focuses on techniques regarding the job interview, and infor-

Figure 7 TRAINING COMPLETIONS (OUTPUTS), OIC POLAND'S EMPLOYMENT COURSES FOR ADULTS, PLAN VS ACTUAL, THRU MARCH 1995		
	PLAN	ACTUAL
"Success on the Job Market," for the Unemployed -- Taught at OICP (15 hrs)	650	224
Workshop to train Labor Office Trainers to teach OICP's course for the Unemployed in their locality (24 hrs)	0	15
"Success on the Job Market," for Unemployed -- Taught at Labor Offices by OICP-trained Labor Office Instructors	0	454
"Success on the Job Market," for Women Seeking Employment (20 hrs)	0	177
"Success on the Job Market," for Handicapped Seeking Employment (16 hrs)	30	41
Workshop to train Trainers of the Handicapped to teach the OICP course (18 hrs)	25	27
	705	938

Source: OIC Poland completions data

mation regarding interpersonal group relationships and employee evaluation. Each participant receives an 80-page course text.

Figure 7, above, notes that, to date, the OIC has trained 224 unemployed in the workshop, somewhat over one-third of the planned 650. The OIC's training activity regarding the very popular course took place early in the life of OIC Poland, it ceased when OIC management realized that its practice of directly training the unemployed could be accomplished far more speedily and more effectively by training a group of labor office trainers to accomplish the same task. Hence, although the task was not originally included in the Logframe project design, OIC Poland taught 15 regional labor officers how to provide the OIC training to their unemployed clients on-site. For that purpose, two additional classes were added to the basic course, to instruct the officers how to conduct workshops themselves. Through March 1995, these labor-office trainers presented the OIC course 47 times to a total of 454 unemployed clients. No other NGO in Poland has yet succeeded in having one of its courses used by labor offices to train clients.

Labor office executives interviewed by the evaluators were enthusiastic about the OIC's "Success on the Job Market" workshop taught by labor office personnel. The Director of the Swidnik Labor Office reported that his staff trainer had conducted the OIC course 16 times, to 170 of the Office's unemployed clients, through March 1995. The Director stated "The course is excellent. One-fourth of its completers have found employment -- remarkable in light of the fact that 80% of participants were women, who find it harder to locate jobs than men. The key workshop element is that it changes peoples' method of thinking, it motivates them. The resume-writing element in the course is its strongest element in job-finding success."

The Deputy Director of the Lublin Regional Labor Office echoed the praise. He reported that OIC Poland's "motivational initiative," as he termed it, had made him and his colleagues realize the importance of that training approach far earlier than they otherwise would have, noting that eight of regional labor offices were using it\*. He stated that "our

\* Because OIC International has been aware during a quarter-century of assisting indigenous affiliates to fight unemployment and underemployment that a major adverse impact of long-term unemployment is loss

(unemployed) completers find jobs easier than the rest of our clients " The Deputy Director also noted that, at first, the OIC's "motivational approach" was regarded skeptically at the Ministry of Labor and Social Affairs, and that "we at the Regional Labor Office had to convince them of its effectiveness And, this year, through new legislation, Labor Fund monies can be spent on OIC-type motivational training Now, for the first time, we have funds to pay such trainers "

Two labor offices already have paid OIC Poland to conduct specialized courses for clients

- o For the Lublin Labor Office, the OIC developed a special 94-hour course that combines computer training and "Success on the Job Market," OIC Poland has conducted the course for the Labor Office six times, for a total of 15,000 zlotys

- o For clients of the Swidnick Labor Office who had formed small firms after having completed "Success on the Job Market" courses, the OIC presented a special "ABCs of Small Business Creation " workshop at a subsidized cost of 800 zlotys

### **III-C SPECIAL WORKSHOPS FOR WOMEN AND THE HANDICAPPED**

#### **"The Successful Woman" Workshop**

The Lublin Regional Labor Office, which supervises 12 local labor offices in OIC Poland's prime target area for employment preparation workshops for adults, reported 73,000 jobless at the time of our field evaluation Officials noted that unemployment has risen from 58,000 two years ago, but that it now is leveling off at about 14.5%

Lublin Voivodship's Deputy Director for Economic Affairs stated that there is a general impression among Voivodship public agencies (although he knows of no survey that can quantify that impression) that OIC's employment preparation workshops have been partially responsible for the recent stabilization, and even slight decrease, of joblessness in the region

Overall, women comprise 55% of the unemployed, but in some labor offices, the percentage of women clients is 65% and more Statistics indicate that they generally find it harder to find jobs For that reason, OIC Poland, early during implementation, decided to develop an employment preparation workshop tailored exclusively for women -- even though the Logframe design failed to envision that need Figure 7 reveals that, since its initial presentation in December 1993, the 20-hour course, titled "Success on the Job Market for Women Seeking Employment," has trained 177 women

The Successful Woman workshop, is designed for women in need (e.g., single mothers, unemployed women and women seeking new employment) It holds four-hour daily sessions for five days for two sub-groups of participants the first -- for single mothers -- is conducted during mornings, the second, for other women, is conducted during afternoons

The course consists of nine modules (1) getting to know your self [run by a psychologist], (2) the world of work, (3) planning one's occupational career, (4) how to look for a job, (5) the job application letter, (6) completing a personal questionnaire, (7) preparing a re-

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of motivation and job-search activity all courses that it helps affiliate OICs to develop contain a strong motivational component

sumé, (8) how to look for a job and the job interview, and (9) how to dress for the interview [conducted by a stylist]

Single-mother participants are provided a site and kindergarten teacher to provide day-care while they attend the workshop. Donors have contributed the costs of the psychologist and stylist, workshop materials, day-care teachers and refreshments for the children. The Successful Woman program has attracted a great deal of publicity. Lublin's daily newspapers have given prominent mention to the workshop, and television stations have featured stories about its novel approach and its provision for free day-care.

(The reactions [quite favorable] of a number of participants of 'The Successful Woman' workshop are reviewed in Figure 12, "Summary of Evaluators' 1995 Survey of Completers of OIC Poland's Job Market Courses," in Section VI-B of this report.)

In April 1995, during our field evaluation, the OIC was conducting a new psychological/assertiveness workshop for women, aimed at providing following-up training for completers of The Successful Woman course. Another important element in OIC Poland's continuing assistance to women is its plan to create a Woman's Center, with non-USAID-funding, to further help women adjust to the new economic realities in Poland and find jobs. The Center is to be a site for continuing advice, counsel and education, exchanges of experiences and mutual aid.

### **Workshops and Services to the Handicapped**

Starting October 1993 -- see Figure 7 -- the OIC held four specialized 16-hour "Preparing to Enter the Job Market" workshops for 41 handicapped persons (the Logframe calls for a total of 30 handicapped to be so trained). It also conducted two courses to prepare 27 trainers of the handicapped to teach the OIC course (vs. a Logframe plan for 25 such trainers).

The courses for the handicapped were held over four-day periods at a site which permitted easy access for the handicapped. It consists of 10 modules that are reminiscent of those for The Successful Woman workshops: (1) getting to know yourself [conducted by a psychologist], (2) the working world, (3) labor law and the disabled, (4) planning an occupational career, (5) how to look for a job, (6) the job application letter, (7) completing the personnel questionnaire, (8) an occupational resumé, (9) the job interview and (10) how to keep a job.

Government funding of the training for handicapped has caused problems. Government-required prior-approval of applicants has proved an arduous, cumbersome, time-consuming and discouraging process for the handicapped, who too often have been forced to make repetitive personal appearances in crowded, inconvenient offices for required documents.

## IV. TRAINING AND OTHER SERVICES TO BUSINESSES

Purpose End-of Project Indicator 10 of OIC Poland's Logical framework Project Design Matrix calls upon the indigenous NGO's small business advisory services component to train "649 entrepreneurs and business persons and 70 business associations" during the course of project implementation \* Output Indicator 1 c specifies that the OIC training is to focus on "accessing and managing credit, tax preparation, legal aspects of business, accounting and preparation of business plans "

This Chapter is devoted to the widely varied aspects of OIC Poland's business advisory services (A) basic workshops and seminars for persons planning to start their own businesses, (B) special problem-solving workshops for business persons, (C) individual counseling provided entrepreneurs and potential entrepreneurs, (D) basic and specialized computer courses [an important field of activity unforeseen by the project design], (E) assistance to the business consulting profession [another activity unforeseen in the Logframe], (F) creation of a business incubator and a revolving loan fund for young businesses, and (G) information services

Figure 8, on the following page, summarizes OIC Poland's training and other services provided to business persons -- plan vs actual -- through March 1995

Figure 9, in Section IV-D, below, summarizes the OIC's training completions in basic and specialized computer courses -- plan vs actual --during the same period

### **New OIC Lublin Business Development Center**

Thanks to initial funding from the World Bank and Ministry of Labor and Social Affairs, OIC Poland inaugurated a new Lublin Business Development Center on the second floor of its 4 Szewska Street headquarters in May 1995 Staffed by its business advisory services personnel, the Center is to continue serving the OIC's basic entrepreneurial and small/medium business clientele, while expanding its newly started management development services for larger-scale business clients-- including human resource development services, and various forms of consulting and other assignments (The OIC plans to gradually develop the Center into a full-service institution for larger clients, to include assistance to

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\* It is not known why the Purpose EOP targeted so many business associations to be trained by OIC -- a number far higher than are thought to exist throughout Poland OIC Poland tried unsuccessfully to spark the organization of a Lublin-area business association Early in the course of project implementation the NGO wisely decided to concentrate its limited funds and human resources on providing business advisory services on individuals and to individual businesses

such firms regarding negotiations and other specialized areas. In that regard, the OIC will use the part-time assistance of attorneys, accountants and other professionals for specific tasks.)

The World Bank and Ministry of Labor have provided funds for renovation of the premises, payment of initial rent, and provision of office furniture and equipment, including computer work stations for training as well as administrative use, fax machine and copier.

**Figure 8 OIC POLAND TRAINING AND OTHER SERVICES PROVIDED TO BUSINESS PERSONS. PLAN VS ACTUAL. THRU MARCH 1995**

	PLAN	ACTUAL
"ABCs of Small Business Creation," Workshops taught at OIC Poland (24 hrs)		320
"The ABCs of Entrepreneurship," taught at Swidnik for that Labor Office		15
"The ABCs of Entrepreneurship," for Bilgoraj Regional Development Agency		15
Specialized Workshops, "Taxes and the Tax Department" (15 hrs)		89
Specialized Workshops, "Marketing in Small Businesses" (10 hrs)	649	35
Specialized Workshop, "Legal Bases of Small Business Operations" (10 hrs)		18
Specialized Workshop, "Small and Medium Enterprise Strategy" (15 hrs)		15
Specialized Workshops, "Basic Credit Principles" (10 hrs)		21
Human Resources Management Training for persons employed in Personnel Departments of larger firms (50 hrs)		0
Workshop for Consultants on "Managerial Accounting" (24 hrs)	0	48
Workshop for Consultants/Advisors to Small and Medium Enterprises (30 hrs)	0	26
Marketing Seminar for Businessmen from Belarus (32 hrs)	0	20
Seminar, "Cooperation between Polish and Belarus Entrepreneurs"	0	64
Participants, Business Incubator Workshop at Lublin	0	25
Participants, Business Incubator Study Tour and Seminar	0	18
Lectures at the Lublin "New Business club"	0	69
Motivation Course for Trainers of Lodz Employees who face probable job loss	0	6
Individual Counseling Sessions with business clients	0	565
Workshops for Business Associations	70	0
	<b>719</b>	<b>1,408</b>

Source: OIC Poland completions data.

#### IV-A. BASIC WORKSHOPS, SEMINARS AND LECTURES FOR PERSONS PLANNING TO START THEIR OWN BUSINESSES

OIC Poland's initial business advisory services focused on a relatively short, 24-hour, basic workshop, "ABC's of Small Business Creation," whose course content and approach parallels in many respects those of the OIC's employment preparation course for secondary school students, and its employment preparation workshops for jobless adults, women and the handicapped, covered in Chapter III. Through early April 1995, OIC Poland had conducted 21 "ABCs" workshops, at its headquarters, for 320 participants, and an additional 15 each at the Swidnik Labor Office and for the Bilgoraj Regional Development Agency. OIC personnel report that -- unexpectedly -- workshop participants have been as interested in upgrading their employment skills as becoming entrepreneurs.

The "ABCs of Small Business Creation" workshop consists of four modules: (1) general introduction into business [character traits of business people, business as a method of self-employment, small business in Poland, hints on types of business activity, and the business plan], (2) marketing [what it is, market-mix, product and pricing policies, distribution

and promotion, and a product's life cycle], (3) finances and financial planning [costs, financial needs, cash flow, the balance sheet and income accounts, break-even point, sources of financing], and (4) law and taxes [the Act on Economic Activity, legal forms of economic activity, lump-sum taxing and the tax card, value added tax, and recording income and purchases] OIC Poland charges individual participants 35 zlotys for the workshop. The Swidnik Labor Office and Bilgoraj Development Agency paid 800 zlotys and 1,000 zlotys, respectively, for the sessions conducted on their behalf.

(The reactions of 13 workshop participants are reviewed in Figure 14, Summary of Evaluators' 1995 Survey of Completers of OIC Poland's "ABCs of Small Business Creation" Course," in Section VI-B of this report.)

In line with its drive to assist the Lublin region in cooperating with businessmen of countries to its east, the OIC, in May 1994, conducted a basic, five-day, 32-hour "Business Marketing Seminar" for 20 businessmen from the Minsk area of Belarus. The instruction, lodging and subsistence costs of the seminar were fully underwritten by the Stefan Batory Foundation. To the same end, the OIC also conducted a basic eight-hour seminar, "Cooperation Between Polish and Belarus Entrepreneurs," that attracted 64 participants, each of whom paid 70 zlotys.

Closer to home, personnel of OIC Poland's business services unit conducted a business incubator workshop at Lublin for 25 participants, a business incubator study tour/seminar for 18 participants, and delivered three lectures on basic business development to 69 members of the Lublin New Business Club. None of the international activity reported in this paragraph was foreseen in the program's Logframe.

#### **IV-B SPECIALIZED PROBLEM-SOLVING WORKSHOPS FOR BUSINESS PERSONS**

During the course of the past two years, the OIC conducted a series of 10 workshops to help 178 small- and medium-scale business persons solve specialized problems and master areas of expertise needed to better manage their operations. The training has included:

- o 4 workshops on "Taxes and the Tax Department," for 89 participants,
- o 2 workshops on "Marketing in Small Businesses," for 35 participants,
- o 2 workshops on "Legal Bases of Small Business Operations," for 18 participants,
- o 1 workshop on "Small and Medium Enterprise Strategy," for 15 participants, and
- o 1 workshop on "Basic Credit Principles," for 21 participants.

Recently, OIC Poland has begun developing more intensive and/or longer workshops to upgrade middle-level (and in some cases, top-level) employees of larger, more complex organizations. The workshops combine the OIC's motivational approach with sophisticated skills-training.

- o The first of the new series of workshops was a 50-hour "Human Resources Management Workshop for Personnel Managers" of larger firms.\* Key modules included (1) organizational culture, (2) why people resist change, (3) selling ideas to

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\* OIC Poland conceived the Human Resources Management workshop for Company Personnel Directors (and other planned human resources management workshops) as a result of the positive reaction generated by its major September 1994 "Polish Workforce 2000 Conference." Theme of that Conference was "improving business performance through better human resources management." See Section V-C of this report regarding Conference details.

management, (4) the company communication system, (5) how to communicate bad news, (6) management styles, (7) hiring people, and (8) performance appraisal. Each of the 37 participating personnel managers was charged 600 zlotys.

- o At the time of our evaluative field visit, the OIC had initiated plans to introduce six additional fee courses for larger-scale businesses
  - a 60-hour workshop on "Human Resources Management" for top managers of human resources departments, with a participant fee of 730 zlotys,
  - a 32-hour "Marketing Strategy" workshop for larger firms, to cost participants 660 zlotys,
  - an 18-hour "Communications" workshop to cost participants 190 zlotys,
  - an 18-hour "Merger and Acquisitions" workshop to cost participants 190 zlotys,
  - an 18-hour "Business Negotiations" workshop to cost participants 190 zlotys, and
  - an 18-hour "Strategy Planning" workshop to cost participants 190 zlotys

#### **IV-C INDIVIDUAL COUNSELING FOR ENTREPRENEURS AND POTENTIAL ENTREPRENEURS**

OIC's Business Advisory Specialists have provided individual counsel and advice to 565 clients, entrepreneurs and potential entrepreneurs since September 1993. Approximately one-third of such counseling sessions were provided to small-scale business clients at OIC Poland's headquarters facility, starting in September 1993. Over time, however, the OIC discovered great duplication among the problems raised at the one-on-one advisory sessions and replaced them with the series of short, specialized, problem-solving workshops -- discussed in Section IV-B above -- through which small groups of small business people could be taught how to resolve similar or identical problems more cost-effectively.

Two-thirds of OIC Poland's individual advisory sessions have been conducted by an OIC Small Business Advisor who helps staff the Lublin Voivodship's "First-Stop" Economic Assistance Center. \* The First-Stop Center was inaugurated by the Voivodship in October 1993 to assist current and potential entrepreneurs and small businesses, both service and manufacturing, in developing local enterprises. It frequently refers visitors to the OIC's business advisory personnel for further assistance.

#### **IV-D BASIC AND SPECIALIZED COMPUTER COURSES**

For an element of OIC Poland's training activity that was not envisioned by the USAID-Washington/OIC International Cooperative Grant Agreement, the OIC's panoply of computer courses has trained a large number of target beneficiaries. The one-thousandth computer-completer was graduated in July 1994, and by the end of March 1995, 1,351 persons had completed an OIC computer course.

"OIC Poland's computer training activity is another aspect of the program's commitment to collaboration with community entities-- in this instance, Solidarity. The European Economic Community's PHARE program had donated 16 computers to Solidarity's Lublin regional headquarters, but had not trained Solidarity in their use. During the first half of 1993, the OIC's assigned Peace Corps Volunteer joined other specialists in conducting a

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\* She also is charged by the OIC with locating a potential business incubator facility in the Lublin area.

feasibility study to determine the need for, and parameters of, a joint center, based at Solidarity headquarters, to provide computer-training for Lublin's unemployed and for Solidarity's regional employees. The result was a signed agreement between OIC Poland and the labor union to establish a training center that initially would focus on teaching basic use of the computer and later expand to more specialized computer training for unemployed adults and Solidarity employees on a 50%-50% basis. The OIC hired a Computer Training Specialist in July 1993. The Computer Training Center opened at 3 Krolewska Street in Lublin one week later.\*\*

Figure 9 TRAINING COMPLETIONS, OIC POLAND BASIC & SPECIALIZED COMPUTER COURSES, PLAN VS ACTUAL, THRU MARCH 1995		
	PLAN	ACTUAL
"Basics of the IBM Personal Computer" (20 hrs)	0	1,131
"Basics of the IBM Personal Computer," for the Handicapped (20 hrs)	0	11
"Word for Windows" (20 hrs)	0	40
"Personnel, Salaries & Office Procedures" (30 hrs)	0	25
"Computer and Motivational Training Course" -- six courses conducted at various Lublin Region Labor Offices (94 hrs)	0	74
"Finance and Accounting Course" (108 hrs)	0	38
"Secretary - Personal Assistant Course" (200 hrs)	0	32
	0	1,351

Source: OIC Poland completions data

Figure 9 details the number of completions for individual computer courses conducted by OIC Poland through March 1995

- o 1,131 participants have completed one of 90 "Basics of the IBM Personal Computer" 20-hour courses, which are aimed at banishing unemployed participants' fears of computer operation from their subsequent job-seeking activity. The course has seven modules: (1) introduction, structure of a computer set, (2) types of computer memory -- disc memory, (3) files, programs, operating on files, (4) archiving files, copying, rules of copying, (5) tool programs -- Norton Commander, (6) user programs -- word processor TAG, and (7) ergonomics and a computer work stand -- programs. Early sessions of OIC's basic computer course were free of charge, including one organized specifically for 11 handicapped persons. Since May 1994, the basic course costs participants 55 zlotys -- a fee that covers direct expenses.

(The reactions of 15 course completers are reviewed in Figure 13, "Summary of Evaluators' 1995 Survey of Completers of OIC Poland's Basic IBM Personal Computer Course," in Section VI-B of this report.)

- o 40 participants have completed one of six 20-hour "Word for Windows" word-processing computer courses for advanced learners. The course modules focus on (1) Windows features, (2) introductory information on Word, (3) communicating with a program, (4) word processing, (5) panel editing, (6) formatting symbols, (7) paragraph formatting, (8) page and section formatting, (9) viewing a document, (10) document and serial printing, (11) practice and a test. The fee for participants is 65 zlotys. The OIC also has designed a similar 30-hour "Excel for Windows" course.

\* Mid-Term Evaluation of OIC Poland's Program of Humanitarian/Development Assistance and Services to Help the Unemployed and Self-Employed, pp 36-37

Recently, the OIC Poland Foundation has developed three far-longer, more-intensive, skills-oriented computer training courses that, potentially, may generate significant amounts of income for the NGO

- o A 200-hour "Secretary-Personal Assistant" course that includes 120-hours on the computer. The course is designed for administrative and executive assistants and office managers. It consists of (1) 128 hours of computer training ["Basics of the IBM Personal Computer" and user programs of the work stand, plus eight software packages], (2) 20 hours of preparing to-take-a-job motivational training, (3) 30 hours of language communication, (4) four hours conducted by a stylist and six by a psychologist, (5) six hours of management and administration training, (6) four hours of negotiations, and (7) two hours of secretarial practice

The Secretary-Personal Assistant course has proven very popular since its inception in mid-1994. OIC Poland reports that a third of the first group of participants had found employment before the course was completed, and that training slots for the next two groups of participants were over-subscribed. Fee per participant is 480 zlotys.

- o A 108-hour "Finance/Accounting" course that combines 72-hours of general finance and accounting training and 36-hours on the computer. It includes (1) three hours on the elements of accounting, (2) 36 hours on tax legislation of various kinds, (3) 14 hours on longhand bookkeeping, (4) 12 hours on keeping books of receipts and disbursements, (5) 36 hours on the computer [elements of word processing, software needs of firms, computer bookkeeping], and (6) 11 hours on tax statement filing. The participant fee is 300 zlotys.

- o A 94 hour "Computer/Motivational Training" course, especially designed at the request of the Lublin Regional Labor Office for its unemployed clients. The course consists of 82 hours of computer training and 12 hours of motivational /job seeking information. The Regional Labor Office pays OIC Poland 2,500 zlotys each time it conducts the course. Through March 1995, the course had generated a total of 15,000 zlotys for the Foundation.

#### **IV-E. ASSISTANCE TO THE BUSINESS CONSULTING PROFESSION**

The development of private business was not encouraged in communist-dominated post-World War II Poland. Therefore, in view of the scarcity of experienced, professional, business consultants/advisors, the OIC has taken upon itself the task of helping raise their competence so that they increasingly will be capable of assisting OIC clients, and participating in the OIC's own efforts to solve specialized business problems. For that purpose, it formed an advisory network of Lublin-area consultants with a variety of experiential backgrounds, including attorneys, accountants, financial, banking and marketing specialists, production engineers, and psychologists.

OIC Poland has conducted two workshops for local consultants/advisors

- o In September/October 1993, it sponsored a 24-hour "Workshop in Managerial Accounting," attended by 47 members of the advisory network.

- o Towards the end of that year, an OIC International small-business consultant and OIC Poland's Small Business Advisory Services Manager conducted a 30-hour

workshop for 26 members of the network, concentrating on the concepts and general parameters of the advisory process. Modules for this "Workshop for Consultants/Advisors to Small- and Medium-Scale Enterprises" were (1) theory and practice of small and medium-scale business management, (2) introduction to management consulting, (3) overview of the advisory process, (4) analytical and problem-solving tools, (5) behavior and communications issues, (6) the marketing and managing of assignments, (7) small and medium enterprise case analysis, and (8) cooperation with OIC Poland's Business Advisory Center

#### **IV-F THE BUSINESS INCUBATOR AND THE ENTERPRISE DEVELOPMENT LOAN FUND**

##### **The OIC Business Incubator**

"By late 1993, OIC Poland had met the Grant Agreement's Output 1 b's rather easy goal regarding progress towards initiating, by the end of the project, a Business Incubator -- i.e., 'the process for establishing a business incubator will be well under way, including the feasibility study and proposal documents developed and submitted for funding'

"This interest in Business Incubators is echoed in the Lublin Region's (1992) Strategy for Economic Development (which) states that 'The provision of a range of suitable premises from incubator units to larger units, enabling the expansion of small and medium enterprises, should be an integral element in any overall program of support for small and medium enterprises. The smaller incubator units should offer common services to assist (business) start-ups'

"A Business Incubator, or 'shared work space' -- the British term for a gathering-together of small enterprises -- provides two basic forms of support: premises and centralized services. The incubator brings small businesses together, helps reduce the isolation of individual firms, encourages inter-trading and mutual support, and makes tenants more visible and credible, and hence more likely to attract clients, suppliers and investment. They are very popular with Polish regional and local authorities. However, Business Incubators are expensive capital projects and need to be established with extreme care and pre-planning."

By the closing months of 1993, OICI British consultants had (1) prepared a detailed demand-side feasibility study to determine the need for a Business Incubator in the Lublin area and identified potential users, (2) prepared a supply-side feasibility study to determine the condition and availability of usable structures, and (3) they helped OIC Poland prepare Business Incubator proposals to potential donors -- the World Bank/Ministry of Labor and Social Policy, and the British "Know How Fund". OIC Poland's proposal won the competition for a Lublin area Business Incubator, with funding predicated upon City of Lublin or other area municipality assigning a suitable facility. Unfortunately, despite numerous expressions of moral support by all administrative and local government organizations, a suitable facility for the Incubator has not been offered to the OIC.

The basic problem, according to Lublin Voivodship officials is that the 90 business (usually manufacturing) facilities owned by the Voivodship are, for the most part, in dire financial straits -- some are in bankruptcy -- and the land upon which they are located is heavily collateralized by bank loans. The Voivodship strives to maintain its plants in op-

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\* Ibid p 22

eration, in order to save the jobs of their workers, but the Voivodship lacks funds to provide them needed financing \* Because some of the plants may undergo restructuring, there is some hope of an eventual OIC Poland acquisition of a suitable facility for Business Incubator use Meanwhile, the OIC continues its diligent search for a building

### **An OIC Enterprise Development Loan Fund**

"There are venture capital lending institutions in Poland, but they lend only to large business organizations Foreseeing the problem, Output 1 d of the Logframe calls upon OIC Poland to establish a Revolving Loan Guarantee Fund 'to facilitate access to loans by program beneficiaries It set the magnitude of the guarantee fund at \$38,000, with monies 'to be accessed by businesses gradually over the two-year period (of the Grant) ""\*\*

The OIC long ago detailed the scope and parameters of its planned Enterprise Development Loan Fund Its "comprehensive position paper (a) details the purpose and goals of the projected credit program, (b) how it fits into the OIC's mission and training program, (c) how the Fund is to be structured and managed, and (d) the nature and character of its target client The paper also (e) details the duties and responsibilities of the Fund's program manager, credit officer, staff, credit committee and OIC's Board of Directors and executive management, regarding the projected Fund, and (f) establishes the Fund's structure and conditions, including loan purpose, loan limits, loan term, repayment schedule, interest rate and base, loan fees, collateral, client/borrower participation required, guarantees, and the guarantee term and fee ""\*\*\*

For more than two years the OIC Foundation has tried unsuccessfully to introduce into its statute a provision enabling it to carry on loan activities in accordance with binding legislation However, because the responsible court takes a restrictive approach in that regard vis-à-vis foundations, it is doubtful that suitable changes in OIC's statute can be achieved At the time of the field evaluation visit, OIC personnel reported that at least two further steps appear needed to break the current log-jam (1) to gain financial support from the Ministry of Labor and Social Policy, the OIC Foundation probably will have to form a separately constituted "association" through which to handle the Enterprise Development Fund, and (2) it will probably have to run loan activities through a commercial bank interested in the project

### **IV-G. INFORMATION SERVICES**

Logframe Output 1 c anticipates that OIC Poland will publish a newsletter and issue appropriate informational and technical booklets for client and potential clients The foundation's newsletter is a sprightly, attractive publication that serves as a useful public relations vehicle designed for current and potential client and donor readership The OIC also has published occasional brochures, including "Preparing a Business Plan" and "How to Prepare the School Graduate to Enter the Job Market -- the costs of which were funded by donors

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\* Polish cities and towns can raise operating and capital funds from local taxes and conceivably might develop funds to purchase or renovate a facility for Business Incubator use However, voivodships do not possess a tax base, so are handicapped in that respect

\*\* Op Cit p 30

\*\*\* Ibid p 30

OIC Poland maintains a technical library which is available and widely used by its staff members, consultants who belong to its advisory network, and others. The library is housed in a separate room at OIC Headquarters.

## **V. PROMOTING DEMOCRATIC PRINCIPLES, THE ROLE OF NGOS AND ECONOMIC DEVELOPMENT**

Chapter V reviews the OIC Poland Foundation's activities in yet other areas not originally included in the USAID-OIC International Grant agreement -- activities that, like its job-market course for secondary school students, have brought it Poland-wide recognition. First, the Chapter describes two major OIC conferences and workshops, for public policy-makers, that promoted NGOs -- including a 1993 workshop that additionally had Central and Eastern European participation and implications. The Chapter next discusses other OIC initiatives to strengthen Polish NGOs. Finally, it covers OIC Poland's meetings convened to promote business performance, economic development (including rural development) and democratic principles. The initiatives were undertaken by the OIC to help overcome negative aspects of the past five years' dramatic transition from a communist past.

Figure 10, next page, summarizes the OIC initiatives and presents a breakdown of the over 1,600 persons who have participated in the events.

### **V-A MAJOR CONFERENCES AND WORKSHOPS PROMOTING NGOS**

#### **1992 Conference on the Role of NGOs in Promoting Economic Development**

The Conference on "The Role of Non-Governmental Organizations in Promoting Economic Development," held on 25-27 September 1994 in the historic Czartorski Palace in Lublin, was a joint effort of OIC Poland and the U.S. Peace Corps. It was designed to contribute to the Polish Government's aim of reducing unemployment through economic growth. The Conference's specific goal was to consider alternate strategies for small business development in job creation.

Its 87 participants encompassed a wide range of backgrounds and experiences and included notables such as a Vice-Minister of Labor and Social Policy, a Member of Parliament, the Governor of Lublin Voivodship, the Mayor of the City of Lublin, the USAID Representative to Poland, an Assistant Peace Corps Director and the Deputy Country Representative of the United Nations Development Programme (UNDP). Participating were (a) 20 officials representing Polish Government ministries, regions, voivodships and municipalities, (b) 14 from the private sector [business owners, agriculturalists and business associations], (c) 13 members of the OIC Poland Foundation's Board of Directors and staff, (d) 10 representatives of U.S. agencies [Peace Corps, USAID, Departments of Labor and Agriculture, and the U.S. Embassy], (e) seven educators, (f) four bankers, (g) OIC International's Pro-

gram advisor and two OICI consultants, (h) three Solidarity officials, and (i) two representatives of UNDP

Figure 10 OIC POLAND CONFERENCES & SEMINARS PROMOTING DEMOCRATIC PRINCIPLES, THE ROLE OF NGOS, & ECONOMIC DEVELOPMENT		
	PLAN	ACTUAL
September 1992 "Conference on the Role of NGOs in Promoting Economic Development," co-financed by OICP and U S Peace Corps	0	87
November 1993 "Lessons Learned and New Directions Workshop on Roles of NGOs and PVOs," in collaboration with and with the financial support of USAID/Washington*	0	60
September 1994 "Polish Workforce 2000 Conference, to Improve Business Performance Through Better Human Resources Management"	0	120
Seminars on "The Business Incubator as a Community Institutional Support," conducted in Warsaw (Nov '92), Lublin (Feb '93) and Cracow (Apr '93) -- co-financed by the U S Peace Corps	0	119
"LEDA Conference for Leaders of Local Communities," Lublin, May 1993, in collaboration with the EEC's Cooperation Fund	0	27
"Conferences on Economic Transformation of Poland," Lublin, in collaboration with the Catholic University	0	300
Continuing series of "Workshops on the Local Stimulation of Rural Areas in the Ciemiega Valley"	0	270
Seminar on Pro-Ecological Education of Rural Areas in the Ciemiega Valley Pgm	0	25
Seminar on Entrepreneurial Sectors of the Lodz Region	0	65
Seminar for Local Community Leaders	0	33
Seminars on "Restructuring the Polish Economy -- Theory vs Practice," at the Catholic University	0	300
Seminar on "Why Farmers Organize," for the Office of the Lublin Voivodship	0	200
* OIC Poland received additional separate funding under Amendment No 1 under Grant EUR 0032 A-00 2085, to conduct the Workshop	0	1,606

Source OIC Poland completions statistics

Topics discussed at the 1992 OIC/U S Peace Corps Conference included Lublin Region's Economic Development Program, OIC International's role in the development of its Polish affiliate, OIC Poland's small business advisory services to business and its employment preparation programs, small business loans, business incubator development and management, and the incubator's function as a tool for local development and promotion of small and medium enterprises, and the UNDP's role in developing human resources and social services in Poland

### 1993 Lessons-Learned and New Directions Workshop re NGO Development in Central and Eastern Europe

The aims of the following year's major Workshop were twofold (1) to assess the contributions of U S -based PVOs in assisting Central and Eastern European transformation, and use the lessons they have learned to advise USAID on future U S PVO roles in assisting Central and Eastern European evolution, and (2) to review the roles of indigenous NGOs as critical components of democratic societies in Central and Eastern Europe, and determine whether and how USAID can support their sustainable development

The concept of the Workshop originated at USAID/Washington. It was brought to OIC International's attention by the USAID Project Officer and was funded by a special September 1993 Amendment to the USAID/OIC International Cooperative Grant Agreement. The Workshop was organized and managed by OIC Poland, its logistics were handled, under subcontract, by the American Committee for Aid to Poland, and it took place in Lublin from 8-12 November 1993.

Among the 60 participants were (a) 35 representatives of indigenous and American PVOs and NGOs based in eight countries: Bulgaria, the Czech Republic, Hungary, Norway, Poland, Romania, Slovakia and the United States, (b) 11 representatives of USAID -- two from Washington DC and nine from USAID offices in the Czech Republic, Poland, Romania and Slovakia, (c) three representatives of the Polish-American Congress, and (d) three from OIC Poland and OIC International. The Administrator of USAID delivered a videotaped address to the workshop.

Each day of the Workshop was devoted to a major topic: organizational development, principles of NGOs, policy oversight, services redefined, democratic processes, and recommendations from the PVOs/NGOs and USAID. After the lessons-learned discussions, USAID outlined its "New Directions for the Future" concept, stressing its support for sustainable development in four sectors: the environment, economic restructuring, democracy, and population and health.

## **V-B. OTHER INITIATIVES TO STRENGTHEN POLISH NGOS**

The dramatic recent growth of the Polish private sector, coupled with an emerging NGO community, is bringing about new standards and values for an economically and socially sensitive Polish society. Thanks to the support of international donors, Polish NGOs are emerging as vibrant new actors within the democratic institutional framework. The needs for NGO programs and services have continued to grow as the Polish Government withdraws support from the public sector due to economic constraints and unanticipated social problems accompanying the period of transformation.

Unfortunately, linkages between the private, governmental and NGO sectors in Poland have yet to be formalized. The initial linkages, which will provide the firm roots for integration and communication among the sectors, are now at a stage in which critical support and nurturing must be applied to ensure that the roots will grow into sturdy pillars of the infrastructure of a democratic, market-based society. However, NGOs' abilities to provide for their sustainability remain a dilemma which has yet to be resolved. Most NGOs have yet to build the necessary public support for their activities, because they are so new a phenomenon in the Polish reality and because they apparently have been unable to dramatize their importance and value to Polish society.

The OIC Poland Foundation -- probably the best known and one of the most successful of the indigenous NGOs -- has, almost from its inception, been conscious of its responsibility to network with and help strengthen the NGO community in Poland. To that end -- in addition to the two major events cited above -- the OIC has undertaken a series of initiatives during implementation of the USAID-OIC International Grant that include:

- o Support for local groups interested in forming NGOs that follow the OIC self-help, community-based, development model and principles (i.e., OIC Poland's start-up assistance to OIC Lodz and OIC Gorzow Wielkopolski),
- o Sharing its experiences and expertise, and facilitating collaboration among

other NGOs (For example, OIC Poland took a key role in a May 1995 two-day Forum of Non-Governmental Initiatives for all NGOs in southeastern Poland. The OIC's Executive Director addressed the Forum's plenary session and an OIC staff member participated in workshop sessions )

- o Seeking to influence changed attitudes and behaviors towards NGOs among program and community participants, and government representatives who come in contact with OIC Poland, and
- o Having OIC management play active roles in regional and national development activities

An official of the Lublin Voivodship has noted that the networking aspect of the OIC's activity is unique among Polish NGOs and is a key factor behind the major impact made by the program to date. "OIC Poland, he stated to Mid-Term evaluators, "is perhaps most important for the networking example it sets for others ""

#### **V-C MEETINGS TO PROMOTE BUSINESS PERFORMANCE, ECONOMIC DEVELOPMENT AND DEMOCRATIC PRINCIPLES**

OIC Poland has conducted a series of conferences, seminars and workshops furthering economic development, business performance and democratic principles

##### **1994 "Polish Workforce 2000 Conference to Improve Business Performance Through Better Human Resources Management**

OIC Poland's third major annual conference was conducted in Lublin from 22-24 September 1994, for 120 representatives from large Polish companies, at the University Hall, Law Department of Marie Curie-Sklodowska University. The Conference focused on human resources issues that relate to building a more skilled, responsive Polish workforce by the Year 2000, as the nation continues to move from a command to a market economy.

Its key objectives were to (1) identify and discuss effective personnel policies and human resources management practices, (2) highlight the value and importance of human resources management in Polish firms, (3) learn effective human resources management techniques from top specialists in the field, (4) network with leaders of Polish industry, and (5) gain knowledge regarding specialized training resources. Rather than seeking to provide ready solutions to the numerous problems faced by Poland's largest business firms, the Conference sought to signal new views on personnel policy, emphasizing the significance, heightened efficiency and increased productivity resulting from the introduction of modern human resources management techniques into business organizations.

Responses to an evaluation questionnaire distributed to participants of the "1994 Polish Workforce 2000 Conference" indicated satisfaction with both its organizational and subject-matter aspects. The participants expressed their willingness to reconvene again, under OIC Poland's auspices, to discuss the results of intervening changes introduced into human resources management at their firms.

At the time of the End-of-Project evaluators' field visit, the OIC was marshaling human and financial resources for a "Polish Workforce 2000 Phase II Con-

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\* Ibid p 33

ference." tentatively scheduled to take place in September 1995. Reportedly it is to concentrate on human resources problems in privatized companies

### **Other Relevant Conferences, Seminars and Workshops**

Through March 1995, OIC Poland's initiatives in promoting economic development, democratic principles and business performance, have included the following 23 conferences, seminars and workshops attended by a total of 1,339 participants. The initiatives are listed according to participant magnitude.

- o Three seminars on "Restructuring the Polish Economy --Theory v Practice," at the Catholic University of Lublin, for a total of 300 participants
- o Three conferences on "Economic Transformation of Poland," in collaboration with the Catholic University of Lublin, for a total of 300 participants
- o Nine workshops on "Local Stimulation of Rural Areas in the Ciemiega Valley," with a total of 270 participants \*
- o Seminar on "Why Farmer Organize," at the Lublin Voivodship office building, for 200 participants
- o Three seminars on "The Business Incubator as a Community Institutional Support," co-financed by the U S Peace Corps. Held in Warsaw (November 1992), Lublin (February 1993) and Cracow (April 1993), with a total of 119 participants
- o Seminar on "Entrepreneurial Sectors of the Lodz Region," with 65 participants
- o "Seminar for Local Community Leaders," with 33 participants
- o "LEDA Conference for Leaders of Local Communities," in collaboration with the EEC's Cooperation Fund. Held in Lublin, with 27 participants
- o Seminar on "Pro-Ecological Education of Rural Areas in the Ciemiega Valley Program," for 25 participants

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\* OIC Poland has participated in the Lublin region's major rural development project, "Pro-Ecological Development of the Ciemiega River Valley," from its inception. The OIC has the task of helping to educate affected inhabitants concerning the scope and aims of the Project, the inhabitants' potential roles and the advantages to be derived by them -- a very responsible assignment for a small NGO such as OIC Poland.

The Director of Lublin Voivodship's Agricultural Department told the evaluators that "The OIC's cooperation with us is a success. The motivational aspect of OIC Poland's training is very important, and is helping to overcome the drawback of the traditional conservatism of the Polish peasant." The Voivodship's Director of Environmental Protection added that "OIC Poland's assistance has been conscientious, professional and extremely helpful."

Part Two:

PROGRAM IMPACTS

## **VI. IMPACT SURVEYS OF TARGET BENEFICIARIES**

This Chapter reviews two surveys of adult men and women who have completed training at OIC Poland. Although both studies concentrated on the same target beneficiaries -- those who had taken OIC courses and workshops for the unemployed and the self-employed -- differences in survey methodology, participants interviewed and time periods covered make them supplementary rather than duplicative. Their marked similarity in findings appear to confirm their essential validities. The first survey, undertaken in mid-1994, was developed and conducted by the OIC itself. The second was conducted in April 1995 by the evaluators who prepared this report. (OIC Poland's course for secondary school students preparing to enter the job market was not covered by either survey, the evaluators' separate survey of teachers, other educators and Labor Office officials who can knowledgeable assess that program is included in the Section III-A review of the school program.)

### **VI-A OIC POLAND'S 1994 MONITORING SURVEY OF CLIENTS**

The Monitoring study of OIC Poland's adult clients was undertaken by the Foundation in June and July 1994, and was published in August 1994. The study was undertaken in response to a recommendation contained on page 31 of the Mid-Term Evaluation which stated that "OIC Poland should conduct, by mid-1994 at the latest, a comprehensive follow-up of its trainees and their subsequent enterprise and employment histories. The OIC's goal, after all, is not simply to train people, but rather to upgrade the skills of small business persons and not simply to motivate the unemployed to seek jobs, but to so train them that significant numbers find employment."

Purpose of the Monitoring study was to collect information on (a) the percentage of people who found employment after receiving training at OIC Poland, (b) the number of people who started their own businesses, as a result of their OIC training, and (c) to determine the practical value of knowledge and skills that were gained as a result of their training.

The OIC's computerized data base, with its extensive client list, provided the target group of 150 out of a total of 1,150 adults who had received training from OIC Poland in six categories of training courses and business advisory services during the period from 10 July 1993 to 5 May 1994. Participants had taken the following Job Market courses, Computer Training Services, and "ABCs of Small Business Creation."

The target group represented 13.4% of the total, and had consisted -- before their OIC training -- of 64% who had been unemployed, 27% who had been employed, and 9% who had been entrepreneurs. Approximately two-thirds of the target group were women.

The survey questionnaire was developed by OIC Poland and Polish consultants from the Catholic University of Lublin and the Academy of Medicine. The questionnaire consisted of 20 questions with multiple-choice responses, and was designed so that the survey could

be conducted simultaneously among unemployed, employed and entrepreneur respondents. The survey was administered by student interns and was tabulated by OIC Poland. Of the 150 within the target group, 110 responded and correctly completed the questionnaire.

### **Education and Age Characteristics of the Group**

The Monitoring study revealed several quite interesting facets of the demographic profile of OIC's clients. They tend to be better educated and older than clients of other OICs affiliated with OIC International.

- o Fully 39% of the respondents were university graduates and an additional 53% had completed secondary school (40% secondary vocational school, and 13% comprehensive [academic] secondary school). On the other hand, 6% had completed a vocational trades school, and 2% only had finished primary school.
- o The mean average age of the respondents was 35.6 years and the median age was about 38 years. Of the total, 24% were aged 36-40, 17% were 31-35, another 17% were 26-30, 15% were 41-45, 14% were 20-25, 7% were 46-50 & 6% were 51-55.

Figure 11, next page, reproduces three charts from OIC Poland's Monitoring report, including charts of clients' educations and ages.

### **Summary of Findings**

Overall, respondents' rate of unemployment fell from a pre-training high of 64% to a relatively low 33% several months after training, while the number of those employed doubled from 25% to 53%. These results were deemed satisfactory in view of the fact that none of the courses (except, possibly, Basic Computer) taught specific vocational skills. The number of self-employed respondents rose sharply from a pre-training 9% of total, to a post-training 13%. Thirty-six percent of respondents noted that OIC training had provided them with practical knowledge, 40% reported it had taught them a new way of looking at reality, and 22% said the training had stimulated them and motivated them to look for a job.

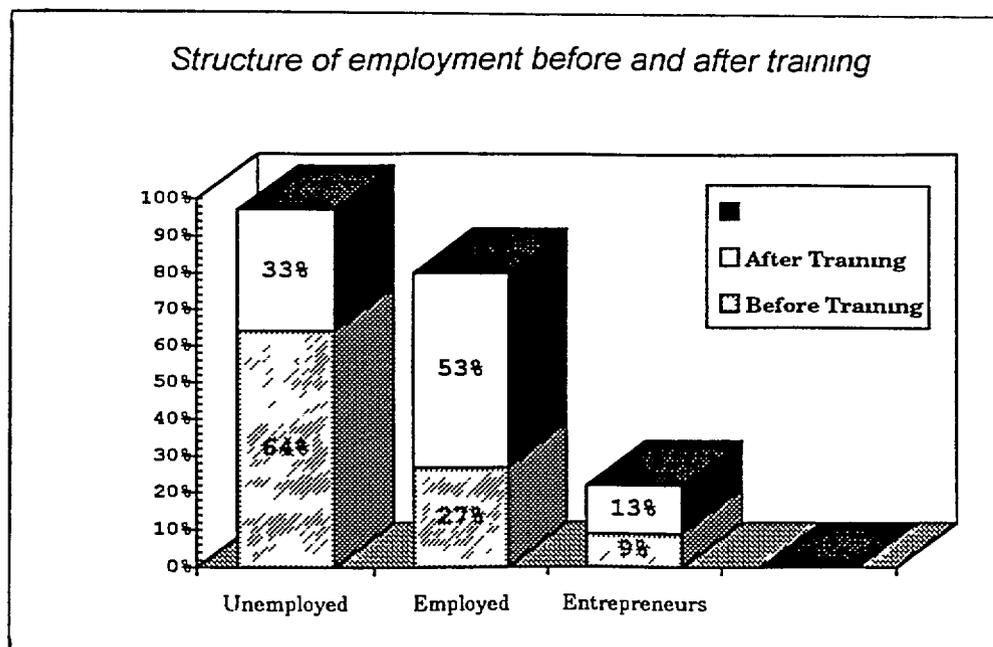
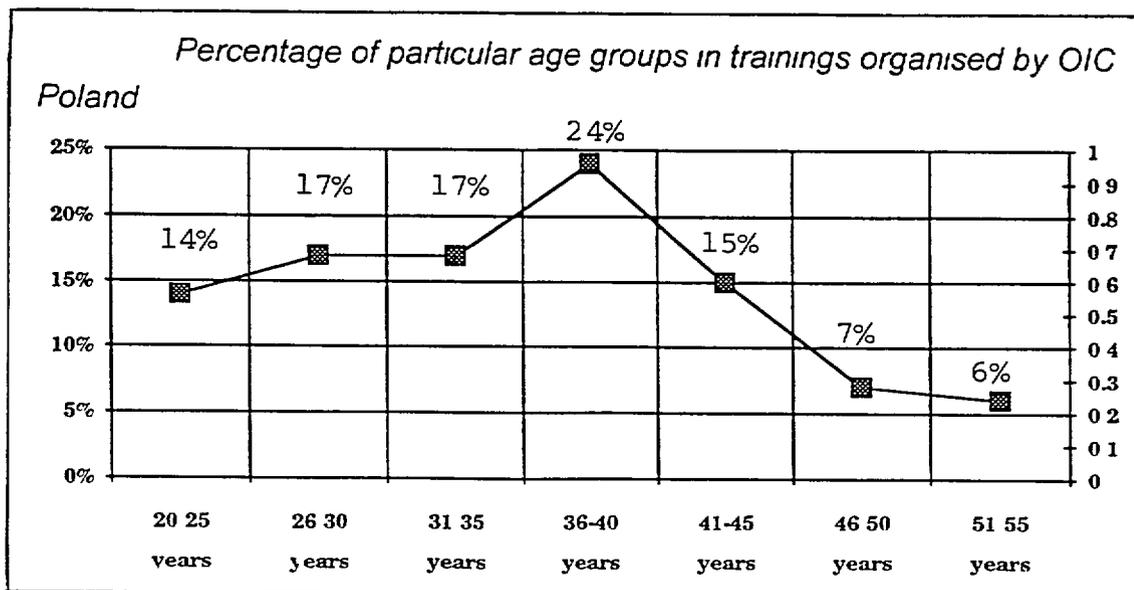
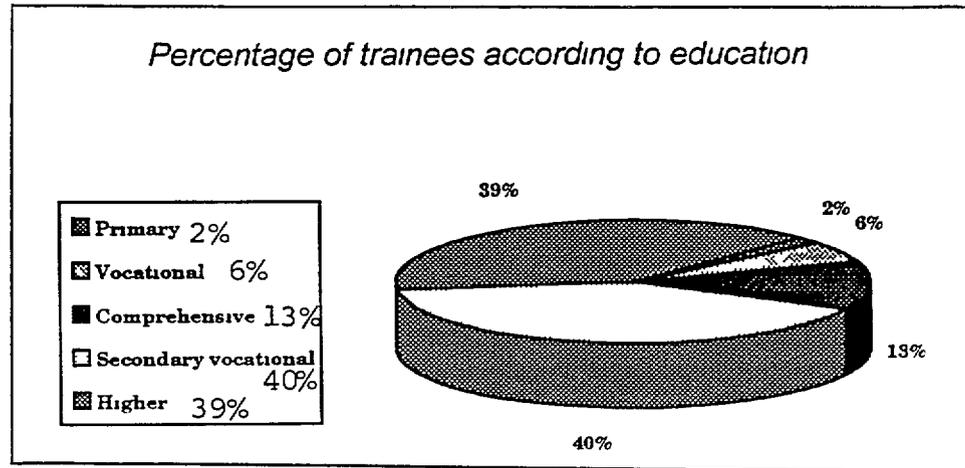
### **Results of the Monitoring Survey among Individual Programs**

"Success on the Job Market," "The Successful Woman," "Preparing to Take a Job, for the Handicapped" Programs) Course contents included preparing to start a job search, career planning, preparation of job applications, and legal and social aspects of unemployment. Approximately 90% of respondents who took the courses between June '93 and May '94 were women, and 20% were handicapped. Before OIC training, 89% were unemployed and 11% had jobs.

Survey results showed that post-OIC-training unemployment fell to 64% and the number of employed more than tripled to 36%. Respondents rated the courses on a scale of 100 points, with those having found jobs giving it the highest marks, while those not finding jobs gave it the fewest points. Based on the results, OIC Poland concluded that, while the trainings are needed and helpful, several basic problems in the job market adversely impacted the job-getting effectiveness of the training.

Computer Training Services The computer courses -- basics of IBM PC and specialized courses in Personnel/Payments and Financial Bookkeeping -- were free-of-charge at the time respondents had completed them. Pre-training unemployment of respondents had

Figure 11 ILLUSTRATIVE CHARTS FROM THE AUGUST 1994 REPORT ON THE RESULTS OF MONITORING OIC POLAND CLIENTS



been 64%, while 36% had had jobs. After the OIC training, unemployment halved to 31% and employment doubled to 69%.

Further analysis on the usefulness of the Basic Computer Training course revealed that 34% of respondents had not been able to use their computer training (either because their employer lacked computers, or because computer-based jobs at their employers required more intensive computer experience). Starting in May 1994, OIC Poland started charging a modest fee for the basic course, in order to attract more appropriate clients and discourage those attracted mainly by its no-cost aspect.

**"ABCs of Small Business Creation" Program** This training program aims to assist unemployed persons who want to start their own businesses. Course content included introduction to small business, legal basics, taxes, marketing, market research and business planning. Of Lublin region respondents who had taken the course between June '93 and May '94, 78% had been unemployed (many of them students), 17% had been employed and sought upgrading, and 5% ran small businesses. Survey results indicated that the number of unemployed had dropped to 39%, while 52% of the respondents were employed, and 9% operated private businesses.

A large proportion (37%) said the course had taught them a new way of looking at the changing business environment and reality. About 28% found that the OIC training had provided them with concrete, usable knowledge, and 24% deemed the course stimulating.

## **VI-B THE EVALUATORS' 1995 IMPACT SURVEY OF OIC CLIENTS**

Because an impact study is a primary objective of an End-of-Project assessment, the evaluators undertook their own independent, corroborative survey of the impact of selected OIC Poland training courses upon its clients. This study differed from the OIC's excellent earlier initiative in that its responses are more qualitative in nature than the 1994 Monitoring study. However, the evaluators' findings confirmed the statistical validity of the previous assessment's findings.

### **1995 Impact Survey Methodology**

Prior to the evaluators' arrival, they requested that OIC Poland prepare, from its computerized client data base, a list of adult training participants who had completed courses between 1 April and 30 September 1994. From that information, the evaluators selected, as the focus of their inquiry, the three most frequently offered OIC courses during that six-month period: "Success on the Job Market," "Basics of IBM PC," and "ABCs of Small Business Creation." From the list of participants in each course, the evaluators randomly selected every third person who could be contacted by telephone for an interview.

During the process of arranging interview appointments, several participants reported that their location and hours of employment made it impossible for them to meet with the evaluators. Others had moved away, or could not be successfully reached. Still others -- some of those still jobless -- were hesitant to be interviewed. Hence, the participants who were interviewed (all in a secluded corner of OIC Poland's headquarters) may not be more representative of the whole than were those interviewed in the OIC's earlier Client Monitoring study.

The Survey Questionnaires (*reproduced in Appendix D of this report*) used for the interviews were designed to be open-ended, rather than multiple-choice, in order to obtain res-

ponses more reflective of the participant's own opinions of course content and effectiveness. Each interview was conducted by an evaluator assisted by a translator. The raw data from the surveys were compiled for further analysis.

During the week of April 3 through 7, the evaluators interviewed 32 participants out of a total of 621 who had taken the designated three courses during the target six-month time period. Hence, the analyzed questionnaires comprised 5% of the participant population. By comparison, the results of OIC Poland's far more extensive Monitoring study were based on responses from 9.6% of the total participant population during its earlier time period. Several of the 32 participants had taken more than one OIC course that had been selected for the 1995 Impact Study, in those instances, the participants were questioned regarding each.

### "Success on the Job Market"

Figure 12, next page, summarizes the evaluators' findings with respect to the "job market" courses that were surveyed -- courses that apparently have been quite successful in helping completers find jobs. All interviewees were female, and 42% of them had completed "The Successful Woman" workshop. One-hundred percent of the participants reported that they had been unemployed before having received training at OIC Poland. However, since then, 83% stated they had found jobs.

The OIC's 1994 Monitoring study had placed the pre-training unemployment rate for trainees completing job market courses at 89%, and had set the post-training employment rate at 36% -- a significantly lower percentage than the evaluators' findings. One possible reason for the discrepancy was stated in the OIC report: there had been insufficient time for many of those who had completed the course in April-May 1994 to have found jobs by the time of the client Monitoring survey in June-July 1994. (NB, interviewees in the evaluators' 1995 survey all had completed their OIC courses 6-12 months beforehand.)

The evaluators' survey also revealed the dramatic job-producing results of the job market courses -- fully 80% of respondents stated that the course had helped them find employment. They noted that the course had prepared them to properly read job advertisements, write applications and curriculum vitae and prepare for interviews with prospective employers. The confidence and motivation that the courses provided to participants was especially important to those 20% who reported that they were still unemployed; they stated that lessons learned during the course continued to help them alleviate long-standing stress resulting from continuing joblessness for lengthy periods.

An overwhelming majority of respondents (92%) found everything in the course to be new and useful. Almost nothing could be deemed "least helpful." Participants kept repeating how valuable they had found course contents. Typical reactions: "It doesn't give you a job, but helps you to look for a job." "The course is very well done." "It is important that instructors emphasize that people keep trying, it is very easy to lose faith at home, just sitting around." (Because of many comments like the following, OIC Poland is actively seeking donor funding to establish a Women's Center: "In the realities of the Polish job market, a woman is not valued nearly as much as a man." "There is no women's organization in Poland where women can meet periodically to discuss the job market situation, exchange experiences, and help one another.")

Figure 12 SUMMARY OF EVALUATORS' 1995 SURVEY OF COMPLETERS OF OIC POLAND'S JOB MARKET COURSES

Name of OIC Course	Number	Percentage	Total
Success on the Job Market	7	58%	7
The Successful Woman	5	42%	5
<i>Total number of people interviewed</i>		100%	12
<b>Were you unemployed at the time of your OIC Poland training?</b>			
yes	12	100%	12
no	0	0%	0
			12
<b>Are you currently employed?</b>			
yes	10	83%	10
no	2	17%	2
			12
<b>Status at the start of employment</b>			
part time	2	20%	2
full time	8	100%	8
			10
<b>Current status of employment</b>			
part time	2	20%	2
full time	8	80%	8
			10
<b>Did your training at OIC Poland help you to get a job?</b>			
yes	8	80%	8
no	2	20%	2
			10
<b>What are the most useful things you learnt in the course?</b>			
How to write an application & prepare c v	8	40%	8
How to prepare and talk to employers in interview	5	25%	5
Provided motivation & gave me confidence to look for job	7	35%	7
			20
<b>Which subjects were least helpful in your job search?</b>			
Every thing was new and useful	11	92%	11
Lesson on how to ask for money	1	8%	1
			12
<b>What would have made the course more helpful to you?</b>			
The course was complete as it was	9	75%	9
Other things should be included	3	25%	3
			12

## **"Basics of IBM PC"**

Figure 13, on the next page, summarizes the evaluators' findings with respect to OIC Poland's basic computer course. It reveals that, before their training, 60% of respondents had been unemployed, but that after training, the number of unemployed had dropped to 47%. The evaluators' pre-training unemployment findings tallied closely with those of the OIC's 1994 survey, but that the OIC's post-training unemployment statistics were a full eight percentage points lower, with 39% still unemployed.

The evaluators' findings indicate that only 13% felt that OIC's basic computer training had helped them to get a job. Anecdotal evidence also suggests that -- in yet another echo of the 1994 Monitoring study findings -- that most participants did not use a computer in their jobs and had not used one since having completed the course. (As noted earlier in this chapter, OIC Poland has since begun charging a modest fee for the course, to minimize the number of participants who previously might have taken it out of curiosity, and -- see Section IV-D -- has begun providing a wide range of specialized computer courses.)

Volunteered responses of basic computer course participants in the evaluators' study dramatize the interest aroused by a first-class instructor. Despite the course's below-average results in terms of producing completers with sharply increased job-finding ability, 100% of respondents stated they would recommend that others take the course because of the excellence of the instructor who had conducted it. Typical comments: "Trainer very good and helpful, I felt free to ask questions." "Trainer treated us as adults." "He provided clear instructions, even the most stupid person who has never seen a computer before could follow the course." "I wish my teachers at school were like him."

## **"ABCs of Small Business Creation"**

Figure 14, on the page following Figure 13, summarizes participants' responses for the "ABCs" course. Comparison of the evaluators' 1994 findings regarding employment status with those of OIC Poland's 1994 study reveals only minor differences. The OIC's study reported that -- before training -- 39% of interviewees had been unemployed, 9% self-employed, and 52% business employees. The evaluators' survey reported that 38% had been unemployed, 15% self-employed and 46% business employees.

The evaluators' survey also revealed that over half (52%) of "ABCs" course participants found that it had increased their knowledge of operating a business, and had helped them understand the legal requirements and legal changes prevailing at that time, but that only 5% had used the knowledge to start a new business or expand their existing business. The result also conforms to the OIC's earlier findings that 4% of respondents had started new businesses after "ABCs" training. (OIC's study attributed the low percentage of new businesses developed to participants' inability to obtain the financing needed to initiate operations or expansion.)

One-fifth of respondents expressed the need to have either an instructor with more first-hand business experience, or a practicing business person who could discuss with them real-life experiences in running a small firm. Others felt that additional information on specific tax and insurance topics would have been helpful. However, overall, most were satisfied with the training they received at the OIC, and would recommend it to others.

Figure 13 SUMMARY OF EVALUATORS' 1995 SURVEY OF COMPLETERS OF OIC POLAND'S BASIC IBM PC COMPUTER COURSE

Name of OIC Course	Number	Percentage	Total
<b>Were you unemployed at the time of your OIC Poland training?</b>			
yes	9	60%	9
no	6	40%	6
			15
<b>Are you currently employed?</b>			
yes	8	53%	8
no	7	47%	7
			15
<b>If jobless did your computer training at OIC help you to obtain a job?</b>			
Do not have a job now	7	47%	7
Course had no effect as I have the same job as during course	1	7%	1
yes course helped me to get a job	2	13%	2
no course did not help me to get a job	5	33%	5
			15
<b>What did you like the best about your OIC computer course?</b>			
Trainer was good answered all questions & taught well	7	39%	7
Liked learning TAG and other functions of computer	5	28%	5
I am not afraid of computers anymore	4	22%	4
Liked the classroom atmosphere	2	11%	2
			18
<b>What would have made the course more useful to you?</b>			
I cannot think of anything	8	50%	8
Time was too short	5	31%	5
<b>Did not include enough information on the following</b>			
Knowledge of keyboard DOS in Polish installation of software dealing with errors etc	3	19%	3
			16
<b>How did you learn of the course you attended?</b>			
Radio & Newspaper	4	27%	4
Labor office/Solidarity	6	40%	6
Other	5	33%	5
			15
<b>Would you recommend that others attend OIC Poland business training?</b>			
yes	15	100%	15
no	0	0%	0
			15

Figure 14 SUMMARY OF EVALUATORS' 1995 SURVEY OF COMPLETERS OF OIC POLAND'S "ABCs OF SMALL BUSINESS CREATION" COURSE

Current Employment Status	Number	Percentage	Total
unemployed	5	38%	5
Self employed	2	15%	2
Employee of a business	6	46%	6
			13
<b>Name of Workshop of Attended</b>			
ABC of Small Business	13	100%	13
<b>The OIC course helped me to do</b>			
Establish a new business	1	5%	1
Expand an already established business	1	5%	1
Improve your business planning skills	2	10%	2
Improve your management skills	2	10%	2
Improve your marketing skills	1	5%	1
Make more money in your business	1	5%	1
Employ more people in your business	2	10%	2
Expand knowledge of finance &			
legal aspects of conducting business	11	52%	11
			21
<b>Did the training meet your expectations?</b>			
yes	12	92%	12
no	1	8%	1
			13
<b>What were the most useful things that you learnt?</b>			
Practical things such as negotiations/documentation/ registering a business	4	44%	4
Learnt how to do a business plan	3	33%	3
Discussions with other participants were helpful	2	22%	2
			9
<b>How did you learn of the workshop that you attended?</b>			
Newspaper/radio/t v	8	62%	8
Other	5	38%	5
			13
<b>What would have made the workshop more helpful to you?</b>			
Have more than 1 instructor/real business people talk to class	3	21%	3
Make course longer	1	7%	1
Different Trainer	1	7%	1
More information on business taxes & insurance	2	14%	2
The course was helpful as it was	7	50%	7
			14
<b>Would you recommend the course to others?</b>			
yes	13	100%	13
no	0	0%	0
			13

## **VII. THE PROGRAM'S PROVINCIAL, REGIONAL AND NATIONAL IMPACTS**

Theoretically, there are diverse indicators by which the impacts of a USAID-funded training program may be defined. Among them: changes it makes regarding the quality-of-life and/or earning-capacity of direct beneficiaries, differences it sparks in the area in which it operates and on its inhabitants, savings the program has contributed to the national government and to local economic development, and the program's likely multiplier effects for an extended or continuing impact.

The longer a program has been implemented, the more extensive and detailed its evaluative "trail" for assessors to follow in measuring quantifiable impact. In the case of OIC Poland's Program of Humanitarian/Development Assistance and Services, the training and impact data available for this End-of Project Evaluation cover only a modest 25 months -- essentially the period from March 1993 -- when initial program funding reached Lublin, enabling the NGO to begin hiring staff to final-design and begin implementing courses and other forms of service to businesses and the unemployed -- through March 1995, when the evaluative field visit began. Hence quantifiable measures of impact over-and-above the analysis of the OIC's (admittedly extensive) planned vs. actual training data and interviews with direct beneficiaries has been relegated, for the most part (but not in several significant instances) to anecdotal, often subjective evidence provided by cognizant public officials, members of the private sector and donors.

The specific facts concerning quantity and quality of OIC Poland's training outputs and the positive comments lauding the program by target beneficiaries in their evaluative interviews, reveal that OIC Poland, in an unusually short time, has developed into a Lublin-based entity with marked success in building necessary "bridges" to the jobless, business, government and the NGO community. Although the OIC is located in a single Polish city, outsider comments and testimonials scattered throughout this report indicate that the program's influence has reached far beyond\*. Its school, employment and business training programs are known, appreciated and some are carried out throughout much of Poland, and some of its conferences and workshops promoting democratic principles, business development and NGOs have attracted participants from various nations of Central and Eastern Europe.

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\* In addition to textual references regarding outsider comments, this report's Appendix C reproduces copies of letters, concerning OIC Poland's initiatives, from the President of the Polish Republic, United States Ambassador to Poland, Governor of Lublin Voivodship, and the Ministry of Education.

A typical assessment of the OIC's impact in its home area, the Lublin Voivodship, is this quote from its Deputy Director for Economic Affairs (a former businessman)

"OIC Poland fits in with our economic reality of restructuring. We are learning from them, from the kinds of training they offer in motivation, computers and human resources management. The OIC knows how to make a dramatic impact. Its Seminar for Polish and Belarus Entrepreneurs was very important for the Voivodship, because Lublin is interested in becoming a bridge between east and west, and we count on the OIC Foundation to facilitate contacts with the Newly Independent States (formerly the USSR) -- our next regional market.

"In addition to what OIC is doing to help businessmen and the unemployed, I know of the good work they are doing with secondary school pupils."

(NB, In another remark, the Deputy Director credits OIC Poland's training workshops with having had significant impact on Lublin's labor market [i.e., he says he "senses" that the NGO has helped bring about the welcome recent stabilization, and even slight decrease, in the Voivodship's rate of unemployment]. See Section III-C of the report.)

This Chapter briefly discusses key indicators of OIC Poland's impact, including (A) unanticipated proliferation of its course for secondary school students, (B) representative quantified savings to the national and regional governments, and (C) the influence of the OIC's training activity and services on unemployment, business and NGOs.

## VII-A UNEXPECTED GROWTH OF THE OIC'S SCHOOL COURSE

Section III-A of this report cites the unexpectedly rapid acceptance of OIC Poland's "Employment Preparation Course" for secondary school students. That it has trained 3,300 students through Academic Year '94/'95, compared to a Logframe-projection of 400 during the period of the USAID/OIC International Grant. That it has trained 291 teachers, not the originally estimated 23 teachers, to teach the course.\* That the OIC course, at the time of the End-of-Project Evaluation, has been taught in as many as 92 secondary schools -- and in agricultural and comprehensive secondary schools, as well as originally targeted vocational secondary schools.

That Section also calls attention to the financial support that chronically under-funded participating schools, voivodship kuratoria and methodological offices and regional and voivodship labor offices have provided from their own limited appropriations to pay for teachers' salaries, teachers' guides, teacher-training (including per diem and travel/transportation) costs in order to implement what, after all, is an elective (not compulsory) course. The course is supported by regional and local educational authorities because they are convinced of its worth. (To date the national Ministry of Education has not made direct payments to support the OIC course.)

In aggregate, the sum required to pay the salaries of teachers who teach the OIC's "Employment Preparation" course (on their own time, after school hours) is sizeable. The average salary cost for a teacher to teach the 70-hour course is 70 times five zlotys per-hour, for a total 350 zlotys. With 291 teachers

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\* OIC Poland's training of trainers has had far-reaching, usually originally-unplanned multiplier effects in areas other than its secondary school effort. For example, as noted earlier in this report, the 15 labor office trainers taught by the OIC to conduct for their unemployed its "Success on the Job Market" workshop have trained 454 clients during the 44 classes they held locally.

having taught one year's course through Academic Year '94-'95, overall total salary costs equal 350 x 291, or 101,850 zlotys, the equivalent of US\$ 44,283, at the 31 March 1995 rate of exchange

## **VII-B SAVINGS TO THE NATIONAL & REGIONAL GOVERNMENTS**

To illustrate the savings that the OIC Poland Foundation has generated for various levels and branches of the Polish Government, we cite two examples. One quantifies the saving of the equivalent of US\$ 1,000,000 through reduced Government unemployment benefits, Labor Fund payments and training costs for unemployed persons with higher education. A second, more modest, example is savings that have accrued to the Lublin Regional Labor Office through the OIC's conduct of workshops for which the Office, at the time, lacked the funds to undertake

### **Quantifying OIC Poland's Savings to the Polish Government**

The evaluation team member who formerly was Poland's Minister of Labor and Social Policy consulted with officials of that Ministry in order to develop a reliable estimate of the savings that have resulted, through relevant OIC Poland training activity, from the OIC's inception through the preparation of its comprehensive August 1994 'Monitoring' study of clients (reviewed in Section VI-A)

Based upon formulas currently employed by the Ministry, the total savings to the State's budget during the period appear to approximate the equivalent of US\$ 1,000,000 (at the rate of 2.03 zlotys equal US\$ 1)

1 Savings from decrease in unemployment benefits The decrease in proportion of target beneficiaries unemployed from 78% before training to 39% after having completed the "ABCs of Small Business Creation" course, the parallel rise from 17% to 52% among those employed after the training, and the increase in self-employed from 5% to 10% after the training -- resulted in a saving to the State's budget of the equivalent of \$300,000 in equivalent U S Dollars -- in the form of unemployment benefits that otherwise would have had to be paid out to the target beneficiaries

2 Through reduction of Labor Fund payments to the families of OIC Poland trainees during the lengthy period during which OIC Poland did not charge for its motivational, computer, handicapped and "ABC" training -- the resulting savings to the Government created by the OIC reached an additional \$196,000 in equivalent Dollars

3 Savings to the Government's budget brought about by OIC's training of unemployed persons with higher education who benefitted from the NGO's computer courses and those for women -- are estimated to total the equivalent of savings to the Government of another \$507,000 in equivalent Dollars

### **Quantifying the Savings of OIC Training to the Lublin Regional Labor Office**

Of the 320 unemployed trained through March 1995 in OIC Poland's "ABCs of Small Business Creation" workshops at the OIC's Szewska Street headquarters (see Figure 8, Chapter IV), 95% or so are estimated to have been sent there by branches of the Lublin Region Labor Office. (Until recently, the branches had no money to pay for entrepren-

eural training for their clients ) Labor Office savings can be quantified at 17,912 zlotys -- the equivalent, at 2 03 zlotys per US\$ 1, of \$8,824, calculated as follows

- o For instructors 21 courses held at the OIC, each for 24 hours, equals 504 person-hours x 15 zlotys per hour for instructors, or 7,560 zlotys
- o For 40 pages of training materials for each trainee 320 trainees times 4 zlotys per trainee, or 1,280 zlotys
- o Equivalent of rent for the OIC training facility 24 hours per course, times 18 zlotys per hour, equals 432 zlotys per training course x 21 courses, or 9,072 zlotys

### **VII-C INFLUENCE OF THE OIC'S TRAINING ACTIVITY ON UNEMPLOYMENT, BUSINESSES AND NGOS**

Interviews and discussions with officials and executives of the public and private sector indicate that OIC Poland's training activity and services regarding the unemployed, businesses and NGOs have had important, sometimes major ramifications Among them

- o The effectiveness of OIC Poland's workshops in helping participants find jobs or improving conditions of work is generally higher than the Ministry of Labor and Social Policy Internal Index of Training Effectiveness For example, whereas the Ministry's Index indicates a 15% job-finding rate for training completers, the findings of OIC Poland's 1994 Monitoring analysis indicate that new, post-training, employment for completers of the "ABCs of Small Business Creation" workshops was 50%, for completers of the "Basic IBM Personal Computer" course it was 53%, for the "Handicapped" workshop it was 51%, for the "Successful Woman" workshop it was 35%, and for the "Job Market" workshop for the unemployed it was 28%

- o If one assumes a conservative 50% rate of employment, job-upgrading and business expansion among adults in the Lublin area who have completed OIC training and/or received its individual consulting services, more than 1,000 persons have benefitted thanks to the NGO

- o Some regional and local labor offices have deemed OIC training sufficiently resultful to pay the NGO to conduct courses for them Thus, this report noted in Section III-B that the Lublin Regional Labor Office has paid OIC Poland 15,000 zlotys to conduct six special 94-hour workshops combining computer training with "Success of the Job Market" instruction, and the Swidnik Labor Office has paid the OIC 800 zlotys to conduct a special "ABCs" course

- o OIC's activities directed at the unemployed and high-risk groups (i e , women and the handicapped), leads many to jobs The OIC is the first institution in the Lublin region to realize the special vulnerability of unemployed women and their serious problem in finding jobs Our 1995 impact surveys of completers of OIC employment preparation workshops and the OIC's 1994 own "Monitoring" study of clients agree that the unique character of the workshops has been unusually productive in motivating trainees of that gender to find and hold jobs

- o OIC Poland's activities directed at the self-employed leads to the growth of small firms and, hence, an increase in the number of jobs they provide for others who work for them

- o The Foundation's motivational approach makes job-seekers and the already-employed more active participants on the job market

- o OIC Poland is a pioneer and the leading NGO of the Lublin region. Its activities, aimed at assisting indigenous NGOs throughout Poland and other parts of Central and Eastern Europe are well-known and appreciated. The rapid expansion of its influence, within a few years after its creation, makes it an inspiration and role model to the NGO community

Part Three:

SUPPORT BASE, INSTITUTIONAL CAPABILITY  
AND LESSONS LEARNED

## VIII. OIC INTERNATIONAL'S SUPPORT SERVICES TO OIC POLAND

During the past 25 years, OIC International, an American PVO, has dedicated itself to the creation, institutionalization and sustainability of indigenous, community-based NGOs, such as OIC Poland, that provide training to the unemployed and to business persons on four continents *"OICI is one of the earliest -- perhaps the earliest -- and one of the most successful USAID grantees to have focused on those aspects of humanitarian assistance"*\*

OIC International's specialty lies in its emphasis upon "graduating" its affiliate OICs, i e , making them self-governing and financially independent of OIC International and the U S Government Towards this end OIC International provides OICs technical assistance in all areas of institutional development and sustainability, including training of their indigenous boards of directors and staff, management and financial control systems, and resource mobilization

USAID's program support grants have helped make OIC International and its affiliate OICs increasingly effective and efficient in serving an increasingly numerous and diversified clientele with ever greater numbers of relevant services *"OICI's record in the area of institutional development is perhaps unsurpassed by any comparable organization OICI is unique in the extent to which it has been instrumental in creating and supporting independent indigenous development organizations"*\*\*

### VIII-A NATURE AND DIMENSIONS OF OIC INTERNATIONAL'S SUPPORT TO OIC POLAND

Under Phase I of USAID Cooperative Grant Agreement No EUR-0032-A-00-2085-00, OIC International has carefully striven to be culturally sensitive in supporting the development of an NGO with Polish leadership, while providing the necessary support (OIC International consultants and staff) tailored to the needs of Polish reality Through mid-April 1995, OIC Poland's initially inexperienced staff had received substantial amounts of carefully designed technical assistance and support from OIC International

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\* Report The Institutionalization and Sustainable Development of Indigenous Affiliated OICs -- Lessons Learned from 25 Years of OIC International's Institution-Building Activity, June 1994

\*\* An Evaluation of OICI International Its Institutional Development Performance, Impact and Cost Effectiveness, Robert R Nathan Inc et al August 1987

Up to the time of the End-of-Project evaluation, OIC International had provided a diversified arsenal of technical support mechanisms to OIC Poland, including

- o Continuing advice, counsel and technical assistance from OICI's Program Advisor to OIC Poland, both on-site and in the U S throughout the period, but with an especially intense effort made during the initial year or so of the Grant
- o Specialized assistance from OICI American consultants, including importantly (a) the Chairman of Business Education at the University of Illinois, who developed the NGO's widely used "Preparing to Enter the Job Market" curriculum for Polish secondary vocational schools, and (b) the Director of the University of Illinois' Small Enterprise Consulting Program, who specialized in business training and services, and the consulting field
- o Periodic visits by OIC International's Director of Training, to train OIC Poland's Board of Directors and Assembly of Founders in their program-guidance responsibilities, and to train the OIC's management, administrative and technical staffs
- o Training, technical assistance and evaluative visits by OIC International's (a) President/Chief Executive Officer, (b) Vice-President of Planning & Development, (c) Vice-President of Administrative Services, (d) Director of Finance, (e) Training Director, and (e) Evaluation Officer
- o Specialized assistance from two British consultants who helped develop OIC Poland's integrated plans for the OIC Lublin Enterprise Center/Business Incubator
- o Sponsorship of the services of independent American and Polish evaluators who conducted the Mid-Term Programmatic Evaluation of the OIC, and this End-of-Project Evaluation, and the independent auditors who conduct that NGO's annual financial audits
- o Sponsorship of study/work visits by members of OIC Poland's management and technical staff, and Board of Directors, to OICI headquarters in Philadelphia and to relevant training organizations in the United States and Great Britain
- o Continuing, diversified forms of backup support provided by OICI headquarters

## **VIII-B ON-SITE ASSISTANCE TO OIC POLAND**

Figure 15, on the following two pages, reviews three-dozen on-site technical support visits made to Poland between February 1993 and April 1995 by OICI-funded specialists. Each listing notes (a) the dates of the visit, (b) the title/specialty of the temporary duty visitor, (c) locations at which work was accomplished, (d) and the types of assistance provided by the OICI-funded specialist.

**Figure 15 OIC INTERNATIONAL'S ON-SITE SUPPORT ASSISTANCE TO OIC POLAND, FEB 1993 - MARCH 1995** *(Work in Poland by OICI Consultants, Staff, etc)*

Visit Dates	Specialist	Type of Assistance
2/1-2/14 '93	OICP Program Advisor	Lublin, Warsaw & Vilnius provided advice & counsel to OIC Poland, visited officials, donors, etc
2/1-2/14 '93	OICI Education Consultant	Lublin & Warsaw Misc work/testing re curriculum he developed for secondary schools
2/1-2/5 '93	OICI Business Incubator Consultant	Lublin Misc activity regarding Business Incubator supply & demand surveys
4/5-4/10 '93	OICI Business Incubator Consultant	Lublin Continuation of activity re the Business Incubator supply & demand surveys
5/6-5/22 '93	OICP Program Advisor	Lublin, Warsaw & Krakow Provided advice & counsel to OICP, visits to officials, donors, etc
5/11-5/21 '93	OICI Director of Training	Lublin Conducted staff training in OIC methodology program implementation, team-building
5/21-5/26 '93	Two OICI Business Incubator Consultants	Lublin Misc activity regarding Business Incubator project and supply/demand services
6/25-7/24 '93	OICI Education Consultant	Lublin, Lodz, Warsaw Led workshop on curriculum for OICP course, visited educators, donors
7/4-7/17 '93	OICI Small Business Training Consultant	Lublin, Lodz, Warsaw Led workshop for consultants to small business, assessed OICP courses
9/26-10/4 '93	OICP Program Advisor	Lublin, Gdansk, etc Participated in meetings, coordinated program activities, etc
10/20-11/6 '93	OICI Small Business Training Consultant	Lublin Co-conducted workshop, provided technical support re courses & proposed loan fund
11-3-11/15 '93	OICP Program Advisor	Lublin Helped prepare/implement OICP/USAID Lessons Learned/New Directions Workshop
11/27-12/17 '93	Two Independent Evaluation Consultants	Lublin, Lodz Warsaw Conducted field portion of Mid-Term Evaluation of USAID Grant
12/5-12/17 '93	OICI Vice-President for Administrative Services	Lublin, Lodz, Warsaw Participated in Mid-Term Evaluation of USAID Grant
12/5-12/7 '93	Two Independent Auditors	Lublin Conducted first financial audit of OICP, worked w/OICP personnel and evaluators
12/12-12/16 '93	Two OICI Business Incubator Consultants	Lublin, Lodz Worked w/OICP re donor proposal participated in pre-feasibility study, etc
1/30-2/5 '94	OICI Small Business Training Consultant	Lublin Worked w/OICP on MIS, evaluated "ABC" Course, worked on "Workforce" Conference
4/6-4/16 '94	OICI Small Business Training Consultant	Lublin & Lodz Additional help re Conference, visited Lodz, worked with Business Advisory staff
4/25-5/2 '94	OICI Director of Finance	Lublin Reviewed auditors' report w/OICP staff, staff training, advice/counsel to OIC management
9/21-10/6 '94	OICI President/CEO and OICI Director of Training	Lublin, Lodz, Warsaw, Gorzow Wielkopolski Training & technical support re program replication, administration, visits to donors, etc
9/22-9/24 '94	OICI Human Resources Mgmt Consultant	Lublin Participated in "Poland Workforce 2000" Conference
11/28-12/19 '94	OICI Economic Development Consultant	Lublin, Lodz & Gorzow Pre-feasibility assessments of OIC Interest Group potentials
12/5-12/16 '94	OICI Education Consultant	Lublin & Warsaw Worked with School Program Specialists & adult-unemployment trainers

(Continued)

Figure 15 (Continued) OIC INTERNATIONAL'S ON-SITE SUPPORT ASSISTANCE TO OIC POLAND, FEBRUARY 1993 - MARCH 1995 (Work in Poland by OICI Consultants, Staff, etc )		
Visit Dates	Specialist	Type of Assistance
12/5-12/10 '94	OICI Vice-President, Planning & Development	Lublin, Warsaw Technical assistance re resource mobilization, forward planning, etc
12/7-12/18 '94	Two OICI Small Business Consultants	Lublin, Warsaw Technical advice & counsel re OICP's Phase II funding proposal to USAID/Warsaw
1/15-1/22 '95	OICI Human Resources Management Consultant	Lublin Conducted Human Resources Management Course for Personnel Department Officials
3/27-4/13 '95	Three Independent Evaluation Consultants & OICI Evaluation Officer	Lublin, Warsaw Conducted field portion of End-of-Project Evaluation of USAID/EUR Cooperative Agreement Grant

### VIII-C OIC INTERNATIONAL IN-SERVICE TRAINING FOR OIC POLAND PERSONNEL OUTSIDE THE COUNTRY

Figure 16, below, presents pertinent details regarding sixteen in-service training support visits funded and organized by OICI for members of OIC Poland's staff and Board of Directors in the U S and Great Britain, from Spring 1992 through April 1995

Figure 16 OICI-SUPPORTED OUTSIDE-OF-POLAND STUDY TOURS OF OIC POLAND STAFF & BOARD PERSONNEL, 1992-1995		
Study Dates	Specialist	Type of Assistance
Spring 1992	OICP's Executive Director	Six-week training at OIC/Annapolis and at OICI Headquarters at Philadelphia
December 1992	Chairman of OICP's Board of Directors & OICP's Executive Director	Leadership [study tour concentrating on management and program development training at OICI/Philadelphia, and elsewhere in the United States
June 1993	Six specialists--2 on OICP's staff, a Board member, Business Incubator consultant, voivodship official & a PCV	Visits to various business incubators in the London area, often in the company of OICI's British Business Incubator Consultant
July-August 1993	OICP's Training Specialist for Secondary Schools	Study/work visit to U S organizations specializing in relevant training programs
July-August 1993	OICP's Training Specialist for Unemployed Adults	Study/work visit to U S organizations specializing in relevant training programs
July-August 1993	OICP's Training Specialist for Women and the Handicapped	Study/work visit to U S organizations specializing in relevant training programs
October 1993	OICP's Executive Director and OICP's Program Advisor	Visits to business incubators in England to identify issues relevant to Poland
January 1994	OICP's Executive Director	Review of OIC progress with OICI/Philadelphia
October 1994	OICP's Business Advisory Center Manager, and Business Incubator Specialist	Study tour of Small Business Development Centers in the U S , and other organizations engages in such activity

(Continued)

Figure 16 (Continued) OICI-SUPPORTED OUTSIDE-OF-POLAND STUDY TOURS  
OF OIC POLAND STAFF AND BOARD PERSONNEL 1992-1995

Study Dates	Specialist	Type of Assistance
April-May 1994	OICP's Deputy Director for Operations	Study tour at University of Illinois, private organizations specializing in relevant programs, and at OICI/Philadelphia
April-May 1994	OICP's Marketing Specialist/ Public Relations Officer	Study tour at University of Illinois, private organizations specializing in relevant programs, and at OICI/Philadelphia
April 1995	Chairman and three members of OICP's Board of Directors	Orientation at OICI/Philadelphia, & meetings with USAID, USDOL, ACAP and U S , PVO leaders

## **IX. OIC POLAND'S INSTITUTIONAL CAPABILITY**

The Chapter reviews various aspects of the OIC Poland Foundation's institutional capability. It starts (A) by reviewing the structure and current status of NGO's organization, management, systems and controls. It then (B) discusses the OIC's resource mobilization and income-generation plans, activities and potentials. Lastly, it (C) comments upon the status of the OIC's institutionalization and sustainable development.

### **IX-A ORGANIZATION, MANAGEMENT, SYSTEMS AND CONTROLS**

#### **Legal Status and Organizational Structure**

The OIC Poland Foundation operates under the Polish Statute re Foundations of April 1984. Its stated aims include "(1) improving living conditions of the Polish people by promoting economic development, (2) improving working conditions and protecting the environment, (3) shaping attitudes of self-help and entrepreneurship, (4) training, evaluating and selecting qualified employees according to market demands, (5) promoting economic entrepreneurship, (6) supporting community based initiatives that concentrate on assisting the unemployed and their families, and (7) organizing job rehabilitation for the unemployed.

Figure 17, next page, presents an organizational chart of the Foundation. From inception, its indigenous governing bodies and staff have brought common characteristics of dedication and commitment to the jobless and to business growth. Dispassionate observers and evaluators attribute their generosity in terms of time and effort expended on the program to careful recruitment, effective management, and adoption of the OIC International "self-help" motivational philosophy by both groups.

#### **The OIC Foundation's Assembly of Founders and Board of Directors**

Policy is made at the OIC Poland Foundation by its non-political 15-person Assembly of Founders and five-person Board of Directors (Executive Committee). The Assembly and Board are community-based and composed of local and regional leaders of diversified backgrounds and experience who donate their services to the NGO without remuneration and on a voluntary basis.

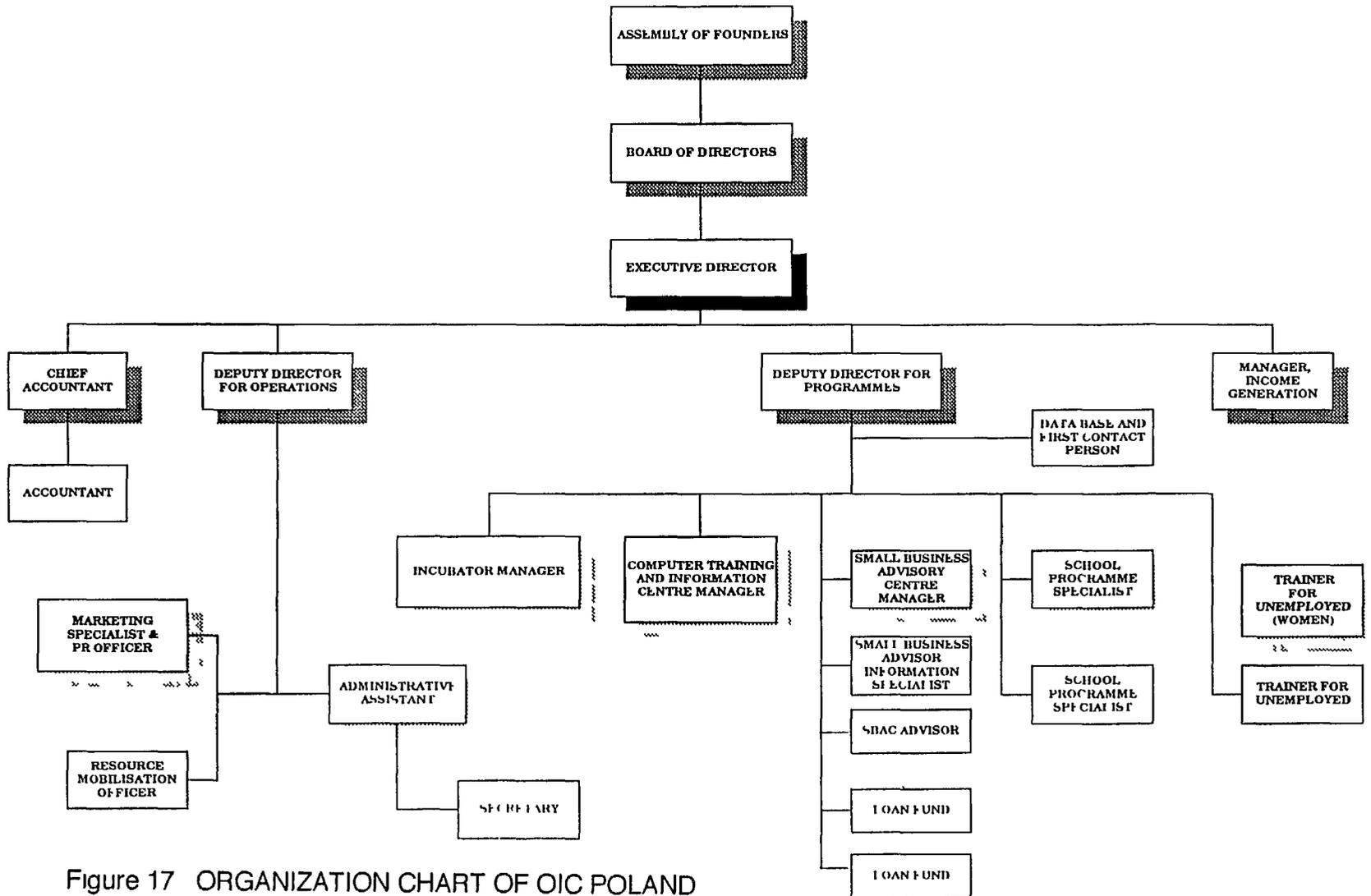


Figure 17 ORGANIZATION CHART OF OIC POLAND

The Assembly of Founders consists three from the educational community (2 university professors and a vocational school director), two from banks, three from private business, two from social service agencies, two farmers, a television official, a banker/educator, and OIC Poland's staff Executive Director. One of the Founders is a business woman. It convenes at least annually, and exercises an overall supervisory role. Its primary powers include appointing/dismissing members of the Board of Directors and accepting the Staff Executive Committee's annual report.

The Board of Directors, elected from among the Founders, consists of two from the private sector (including the business woman), one each from the television station (a former Governor of Lublin Voivodship) and a social service agency, and its Chairman (formerly Director of Solidarity's Lublin Region), who now works at a bank. Members of the Board serve two-year terms and may be re-elected by the Assembly. The Board is empowered to (1) set regulations re the OIC Poland Foundation's economic activities, (2) monitor and evaluate the Foundation's overall activities, (3) approve the annual preliminary budget, (4) regulate the operations and determine the competence of key staff members, including the Executive Director, and set staff salaries, and (5) appoint and dismiss members of the staff, to enforce the previous decision of the Assembly. The Board meets at least six times per annum.

### **OIC Poland's Staff**

At the time of the evaluators' March-April 1995 field visit to the OIC, it had active staff of 20 and had four positions vacant.\*

Clients, local, regional and national government officials, donor agencies, and evaluators (past and present) agree that -- led by an Executive Director who is skilled in managerial and human resources relationships -- the OIC's managerial, instructional, administrative and support staff is young, alert, energetic, creative and conscientious, with a high morale and positive attitudes that are contagious and effective. It also is thinly "manned"\*\*\* and overworked. OIC staff comprised

- A An Executive Director
- B A Deputy Director for Programs, responsible for the activities of the
  - o OIC's Business Advisory Services (BAS) staff (i.e., BAS Manager, BAS Advisor/Information Specialist, and BAS Advisor),
  - o Computer Training and Information Center Manager,
  - o Two Trainers for the Unemployed (including Women)
  - o School Program Specialist
  - o Data Base and First-Contact (with clients/potential clients) Specialist
- C Deputy Director for Operations/Human Resources Management Specialist, responsible for activities of the

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\* The filling of three of the vacant OIC staff positions at the time of the evaluation awaited further developments in the NGO's continuing drives to create a Business Incubator and an Enterprise Loan Fund. Unfilled were the positions of Incubator Manager and two Loan Fund specialists. The fourth vacant position was that of a second School Program Specialist.

\*\* We have used the word "manned" figuratively. In point of fact, two thirds of OIC Poland's staff members are female.

- o Marketing Specialist/Public Relations Officer,
- o Resource Mobilization/Rural Development Officer,
- o Administrative Assistant to the Executive Director,
- o Secretary,
- o Driver and Housekeeper (not included on Figure 17)

D Income Generation Manager/BAS Advisor

E Accounting Department (Chief Accountant, and Accountant)

We have commented elsewhere in this report on the in-service training for staff conducted by members of OIC International's and OIC Poland's staff and their consultants. The training has taken place at the headquarters of OIC Poland, at OIC International's Philadelphia, PA headquarters, and at various organizations and institutions in the United States and Great Britain. Additionally, seven members of the OIC's staff underwent post-graduate development training in relevant subjects at Polish institutions of higher education in 1994 and 1995. In May 1994, OIC Poland's staff took part in a Strategic Planning Retreat at Krasnobrod, Poland, to (a) review the NGO's mission, essential values, accomplishments and present activities, (b) set strategic goals and a strategic plan to reach the established goals, (c) develop operational objectives and plans, and (d) create detailed action plans. Several members of OIC Poland's Board of Directors have received training at OIC International's headquarters and other organizations in the U S.

### **Management and Financial Systems and Controls**

Through the combined efforts of OIC Poland's staff and Board, the Foundation's management control tools, critical program documents and financial/accounting systems are essentially in place

- o Output 2 d of the Logframe states that, "By (the End-of-Project) the following management control tools will be developed and utilized by OIC Poland staff: (i) OIC International's Management Information System, (ii) Annual Project Performance Tracking Form, (iii) Annual Operations Work Plans, (iv) Annual Program/Staff Evaluations, (v) Semi-Annual Operations Progress Reports, and (vi) Quarterly Program (Progress) Reports." Modified OIC Poland versions of all are being implemented via the OIC's detailed, computerized data base, except for item (iv), considered redundant. Additionally, the OIC sends short monthly progress reports to OIC International.

OIC Poland's periodic internal reporting system also is extensive. All project managers submit separate monthly reports to the Executive Director and to the Marketing/Public Relations Officer, and, as earlier noted, the Executive Director sends an annual report to the Board of Directors, which forwards a modified version of the report to the Assembly of Founders.

- o Output 2 e states, "By (the End-of-Project) the following critical program documents will be developed: (i) Personnel Policies and Procedures, (ii) Job Description Manual, (iii) Wage and Salary Plan, (iv) Standard Operating Procedures, and (v) Curriculum developed for course areas." The documents also have been created and are being used.

- o The OIC's Fiscal 1994 Independent Auditors' "Report on Compliance with (U S ) Government Auditing Standards" noted that "OIC Poland complied in all material respects to (their) provisions, and that the Auditors "found no matters

involving internal control structure and operation considered to be material weaknesses " The OIC submits Monthly Financial Reports to OIC International's Finance and Administration Department, which monitors them

### **OIC Poland's Headquarters Facility**

Logframe Output 1 e states that OIC Poland's "Central Office and Training Facilities are to be renovated and fully equipped by (the end of) Fiscal 1993 " The facilities meet those criteria The OIC moved into 232 square meters (2,500 square feet) of newly rehabilitated space on the second floor of an old brick building at 4 Szewska Street in Lublin, under a three-year lease that runs with extension for an unspecified period, at rental no higher than the average market price for such space in Lublin There is a training/conference room on the first floor capable of housing 35-45 participants The NGO can use a same-sized training room on the floor above, as needed

In May 1995, OIC Poland opened a Business Advisory Center on the first floor of the same building Cost of the Center's renovation, furnishings and equipment, and its first year's operations were funded by The World Bank and Ministry of Labor and Social Policy

## **IX-B RESOURCE MOBILIZATION AND INCOME GENERATION**

Because the initial Cooperative Grant Agreement No EUR-0032-A-00-2085 envisioned just two-years of financial start-up support, OIC International and OIC Poland have, since inception, been conscious of the need to seek funding from additional, non-USAID, donors for survival and sustainable development That the Polish affiliate could and should charge fees for business courses was realized early in 1994, half-way into project implementation, with accelerating accrual of anecdotal evidence that the OIC's business and computer workshops were providing valuable knowledge and skills to many participants willing and able to pay for the training

### **Resource Mobilization and Public Relations**

OIC Poland staff -- often with major inputs from OIC International and local consultants, and its OIC International Program Advisor -- began preparing proposals for international donors since shortly after program implementation In the summer of 1993, the OIC submitted proposals to the World Bank and British Know How Fund for a Business Incubator, Small Business Services Center and a revolving loan fund for entrepreneurs These have been followed by proposals submitted for other forms of assistance, to other potential donors including the European Economic Community (EEC)'s Cooperation Fund, Stefan Batory Foundation and the German Marshall Fund -- often without positive result

The OIC has had better results -- but without significant inputs -- from local donors including Solidarity, the National Fund for Rehabilitation and Employment of the Disabled, Wektor Water Company, the Polish Private Entrepreneurs Association, and Unia Hotel,

In mid 1994, OIC Poland formed a Resource Mobilization Department, headed by a Resource Mobilization Officer under whose aegis, the flow of proposals has increased Figure 18, next page, lists \$131,060 in U S-Dollar or zloty-equivalency non-USAID financial and commodity contributions towards the OIC's training and program expenses between 1993 and early 1995 The list is representative, it is far from complete Most, but

**Figure 18 NON-USAID FINANCIAL AND COMMODITY CONTRIBUTIONS  
TOWARDS OIC POLAND TRAINING AND PROGRAM EXPENSES**  
(In equivalent U S Dollars at 23 zlotys = US\$1)

ORGANIZATION	PERIOD	DOLLAR VALUE	PURPOSE
EEC Cooperation Fund	July & Oct 94	\$ 2 296	Training & Study Tour on Business Incubators in Poland Great Britain and France & Cost of OIC Training for Bilgoraj Development Agency
F Ebert Foundation	Sept 94	3 413	Translation for Workforce 2000 Conference
Johns Hopkins Institute for Policy Studies	Oct & Nov 95 March 95	9 000*	Training of Trainers for NGOs
Stefan Batory Foundation	May 94	1 652	Training of Belarus Businessmen at OICP
Stefan Batory Foundation	June 94	1 957	Computer with CD Rom
World Bank / Ministry of Labor & Social Policy	94 - 95	14 044	Computers Fax Printer Copier for Small Business Advisory Center
World Bank / Ministry of Labor & Social Policy	94 - 95	30 132	SBAC Renovation Furniture & 6-Months Operating Costs
Partners for International Education & Training	April 95	9 000*	Study Tour in U S for OIC Small Business Advisor
Regional Development Agencies	1994	1 630	Fees for Training Courses Donation of Training Facilities etc
Regional Labor Offices	93 - '95	7 077	Fees for Training Courses Transport Per Diem etc
Polish Educational Agencies	1994	1 170	Transport/Travel Per Diem for Teacher Training
Kuratoria, Regional Labor Offices, schools	'93 - '95	44 283	Teacher Salaries for Teaching OICP school Course
Polish Radio Stations	1994	3 944	378 20-Second Spots for OICP Announcements
Private Firms, Banks Associations	'94 - '95	1 462	Misc In-Kind Donations usually re conferences
<b>TOTAL</b>		<b>\$ 131 060</b>	
Source: OIC Poland data		*Estimated	

not all of the 14 contributions are considered cash and/or in-kind "matching funds," under USAID's definition of the term

- o \$44,176 was granted by The World Bank/Ministry of Labor and Social Policy for renovation of the OIC's new Small Business Advisory Center, for needed equipment and furniture, and six-months operating costs,
- o \$44,283 in equivalent zlotys was spent by voivodship kuratoria, regional and voivodship labor offices and schools for teacher salaries for teaching the OIC's secondary school course,
- o \$18,000 for study tours in the United States, by (a) Johns Hopkins Institute for Policy Studies and (b) Partners for International Education & Training, for an OIC Trainer of the Unemployed, and an OIC Small Business Advisor,
- o \$9,877 in equivalent zlotys paid by regional labor offices, and development and educational agencies and for OIC training-related fees, per diem and travel,
- o \$3,944 in equivalent zlotys for 378 free-of-charge 20-second spots donated by Polish radio stations for the broadcast of OIC workshop messages and announcements
- o \$3,609 by the Stefan Batory Foundation for a computer with CD Rom and the training of Belarus businessmen at the OIC,
- o \$3,413 by the F Ebert Foundation for interpretation/translation services at the OIC's 1994 Polish Workforce 2000 Conference,
- o \$2,296 by the EEC Cooperation Fund to finance a study tour on Business Incubators in three countries, plus training for Bilgoraj Development Agency,
- o \$1,462 in equivalent zlotys for miscellaneous in-kind donations for conferences and workshops

\* \* \* \* \*

Public Relations OIC Poland has a dynamic Marketing/Public Relations Officer who is responsible for a wide variety of pertinent activities including (a) public relations re communications and the media (networking with the press radio/television stations, writing and editing the OIC's periodic newsletter and developing publicity for OIC and its meetings and events), (b) helping to organizing conferences and meetings, (c) developing/helping design the OIC's advertising, (d) preparing brochures and pamphlets, (5) producing monthly reports to OIC International, (6) and coordinating the preparation and training activities of Polish consultants to OIC

In addition to the in-kind donations of radio time for broadcasts of OIC spot announcements noted directly above, the OIC's Marketing/Public Relations Officer generated 72-and-a-half pages of newspaper and magazine articles during 1994, alone -- about 14 pages per week, free of charge She also generated one-and-a-half hours of radio and television time, during that year, for interviews with OIC staff, and special programs featuring the activities and history of OIC Poland

The OIC held a well publicized "Community Thank You" picnic in July 1994, attended by 200 civic and community leaders It was designed to "educate" the community regarding the value and role of the OIC Foundation and other NGOs

## Income Generation

OIC workshops now charge participants fees for training services that are expected to produce increasingly sizeable income for the program during years to come. They are, however, highly unlikely, in the aggregate, to generate sufficient revenues to cover all program costs. Hence, as noted earlier, additional, diversified, donor support will continue to be necessary ensure OIC Poland's sustainability. (The modest sum the OIC charges for the student workbooks used in its "Employment Preparation Course" does not generate income, the price is set at a level calculated to only defray actual printing and distribution costs, not to raise money for the program.)

The OIC first introduced training fees in May 1994 for computer courses. It expanded use of the device six months later, by introducing modest fees for "The ABCs of Small Business Creation" and "Successful Woman" courses. By the time of the March-April 1995 evaluative visit, OIC Poland had a widespread and varied fee structure.

Figure 19, atop the next page, details the current and planned fees, per individual client, for the OIC's training courses and workshops. The Figure notes that OIC Poland has in effect established a three-tier fee structure for the training it provides clients. The magnitudes of fees charged are based on the nature of the course/workshop, status of the target beneficiary and client ability to pay.

(In April 1995, the average monthly wage in Poland was 644 zlotys, the equivalent of US\$ 280. That figure is a significant comparative benchmark when assessing the client fees, listed below in Dollar equivalencies, for the OIC's courses and workshops.)

1 Subsidized Courses The OIC prices its courses for unemployed men and women, and the "ABCs" course for entrepreneurs and small business persons at less than its actual direct cost to conduct them. The target beneficiary is charged an average per-hour cost of approximately 50 U.S. cents for attending a subsidized workshop.

2 Courses geared to recover direct costs charge the target beneficiary somewhat over one U.S. Dollar per-hour. All the computer workshops and the new, Secretarial-Personal Assistant computer-cum motivation-training course are included in this group. That workshop charges a client about three-fourths of the Polish average monthly wage.

3 Courses with fees set to contribute to OIC overhead range from the equivalent of US\$ 3.73 per hour for the workshop on "How to Enter the Eastern Market" (designed for medium-scale business persons) to from \$4.60 to \$9.00 for the specialized, intensive courses, designed for medium-scale to large-scale business persons, and scheduled to start between May and July 1995. The longer -- 50- to 60-hour -- workshops cost a client, whose economic status presumably makes them affordable, more the Polish average monthly wage.

Figure 20, on the bottom of that page, highlights gross revenues from participants of OIC Poland's training courses from May 1994 through February 1995. It indicates that the third category of workshops -- those with fees set to contribute to OIC overhead -- can generate significant revenues and net income for the Foundation. The Figure points out that a single course, the 50-hour "Human Resources Training for Personnel Department Personnel" workshop for 37 paying participants -- the first and only of the eight planned specialized business courses designed for larger-scale clients to have been conducted by

Figure 19 CURRENT AND PLANNED INDIVIDUAL CLIENT FEES FOR OIC POLAND TRAINING COURSES (To nearest equivalent U S Dollar)

**1. SUBSIDIZED COURSES**

- How to Prepare Job Application Documents (5 hrs) -- \$ **3**
- Psychology/Assertivness for Women (8 hrs) -- \$ **4**
- Success on the Job Market for Women Seeking Employment (20 hrs) -- \$ **8**
- ABCs of Small Business Creation, at OICP (24 hrs) -- \$ **13**

**2. COURSES THAT RECOVER DIRECT COSTS**

- Basics of the IBM Personal Computer (20 hrs) -- \$ **24**
- Word for Windows Computer Software (20 hrs) -- \$ **28**
- Microsoft Exel Computer Software (30 hrs) -- \$ **41**
- Finance/Accounting/Computers (108 hrs) -- \$ **130**
- Secretarial-Personal Assistant Course (200 hrs) -- \$ **209**

**3. COURSES WITH FEES SET TO CONTRIBUTE TO OVERHEAD**

- Human Resources Management, for Larger-Firm Personnel Departments (50 hrs) -- \$ **283**
- How to Enter the Eastern Market (8 hrs) -- \$ **30**
- Communications (18 hrs) -- \$ **83**
- Business Negotiations (18 hrs) -- \$ **83**
- Strategic Planning (18 hrs) -- \$ **83**
- Human Resources Training for Managers (40 hrs) -- \$ **257**
- Marketing Strategy (32 hrs) -- \$ **287**
- Human Resource Training for H R Dept Heads (60 hrs) - \$ **317**

PLANNED  
Specialized,  
Intensive  
Courses, to Start  
May - July 1995

Figure 20 GROSS REVENUES FROM PARTICIPANTS OF OIC POLAND'S TRAINING COURSES, MAY 1994 - FEBRUARY 1995 (in equivalent U S Dollars)

	First 8 Month (May-Dec 1994)	Next 2 Months (Jan-Feb 1995)	Total 10 Months (May'94-Feb'95)
TRAINING COURSES*	\$10,759	\$14,192**	\$24,951
SCHOOL BOOK SALES	9,663	2,860	12,523
TOTALS	\$20,422	\$17,052	\$37,474

\* Fees were first charged by the OIC for several training courses on a test basis in May 1994  
 \*\* A single 50 hour course "Human Resources Training for Personnel Department Personnel" brought in \$10 457 in participant fees to OIC Poland in January 1995  
 Source OIC Poland's Accounting Department

the time of our evaluative visit -- brought in the equivalent of \$10,457 in gross revenues in January 1995 That sum equalled 41.9% of the Foundation's total gross revenues from training courses during the 10-month period

## **IX-C INSTITUTIONALIZATION AND SUSTAINABILITY**

### **Institutionalization of OIC Poland**

The success of the drive towards institutionalization of the OIC results from the OIC's own efforts as well as the dramatic transfer of knowledge and professionalism from the grantee, OIC International, to the subgrantee, OIC Poland, through massive, early technical support and backstopping The OIC's accomplishments in meeting "OIC International's Eight Institutional Development Progress Indicators" for affiliate programs demonstrate that OIC Poland -- thanks mainly to these combined efforts -- is rapidly approaching institutionalization

- 1 The hard-working, pro-bono, services of its volunteer Board of Directors provide effective policy and supervisory direction to the OIC,
- 2 Its management control tools, critical program documents and financial/accounting systems are essentially in place,
- 3 Its indigenous staff is in place and is functioning efficiently and forcefully,
- 4 Its resource mobilization strategy is clearly defined (although greater effectiveness is needed in implementing the strategy)
- 5 OIC Poland is accepted and supported by relevant agencies of national government, many of which have accorded it moral, in-kind and/or financial assistance,
- 6 Community acceptance and support have been high among Lublin Voivodship and City officials, as well as community and civic leaders who partake in the OIC's policy and supervisory direction, or otherwise support the NGO,
- 7 OIC Poland is located in headquarters and training facilities that are inviting, renovated and fully equipped
- 8 It is networking closely with other members of Poland's NGO community, provided start-up assistance to OICs in Lodz and Gorzow Wielkopolski and is offering a variety of services to other NGOs

(Various earlier sections in this End-of-Project Evaluation Report detail the reasons, rationales, progress and accomplishments that underlie each of the above conclusions )

### **Sustainability of OIC Poland**

OIC Poland and OIC International -- which has devoted a quarter-century of service to the concept of sustainable development through establishment of indigenous NGOs -- are well aware that a sustainable Polish NGO is the goal of the 34-and-a-half-month USAID Cooperative Agreement Grant, and are striving to accomplish the task

OIC International's February 1995 "Grant Proposal" to USAID Warsaw for post-July 1995 financial support\* projects that, during Fiscal 1996, income generation will account for 10% of total OIC revenues, and non-USAID donor support will account for 25% of total revenues. Further, that, by Fiscal 1998 -- the last year of the proposed new Grant -- income generation will grow to 20% of total OIC revenues, and non-USAID support will increase to 45% of total revenues. USAID Warsaw reportedly looks favorably upon the new proposal and, at this writing, its prospects appear good. However, the indigenous OIC's progress-to-date suggests that the income-generation aim is perhaps somewhat understated, while the non-USAID-support aim is perhaps somewhat overstated -- unless improvement is made.

The following data demonstrate strong initial success, but a need for further improvement in OIC Poland's drive to achieve that result

- o Current and planned client fees We noted earlier that, conscious of the need to begin generating income from clients, the OIC on a test basis started charging individuals for courses in May 1994. Figure 20's demonstration that gross revenues from participants of training courses are growing rapidly and that US\$ 10,457 of gross revenue were generated from just 37 paying participants in the first session of a single OIC course designed for key employees of larger firms suggests that income derived from client fees is almost certain to increase dramatically in the near- and medium-term future and become an increasingly important tool powering OIC Poland's drive for sustainability.

- o Income from non-USAID donors/contributors However, Figure 18's representative summary of non-USAID financial and in-kind contributions related to OIC Poland's program costs indicates that still more intensive effort and increased professionalism will be necessary in order to significantly increase the rate of such receipts.

### Recommendations

- 1 A speedy decision by USAID Warsaw to process and approve the new Grant for OIC Poland along the lines of, and at the level elaborated in, OICI's February Proposal is needed. The OIC's current USAID funding, through Co-operative Agreement EUR-0032-A-00-2085, ends at the end of September -- just three months from now.

- 2 Continued know-how and backstopping support from OIC International. In line with (a) current USAID Warsaw strategy, (b) the increased professionalism of OIC Poland's management and staff, (c) OICI's policy of phasing out technical support in proportion to an affiliate OIC's progress towards institutionalization and sustainability, and (d) under terms of the Grant Proposal before USAID Warsaw -- OICI's technical support is to diminish in scope, but continue to continue playing an important role to play. It should concentrate on these key areas of need:

- o Assistance in resource mobilization, through OICI's networking with international donors in Europe and U S , liaison activities in Washington DC, and arranging U S study tour(s) to train OIC staff in proposal writing,

- o Arranging study tours abroad for other OIC personnel,

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\* OIC Poland, Program to Support Private Sector and NGO Development 6 February 1995 prepared by OIC International

o Technical support in recruiting needed foreign consultants and specialists for OIC Poland,

o Periodic technical assistance and staff training in financial management per U S Government regulations, and in Board and staff operations training

## X. LESSONS LEARNED

Chapter X presents an informal list of lessons learned (plus several lessons not-yet-learned) in connection with the program design and implementation of USAID/OIC International Cooperative Grant Agreement No EUR-0032-A-00-2085, "OIC Poland's Program of Humanitarian/Development Assistance and Services to Help the Unemployed, Businesses and NGOs and to Further Economic Development "

The review herein, does not catalog the prescient elements program design, carefully crafted by program designers who correctly forecast outputs whose attainment would demonstrate the institutionalization and sustainable development of an indigenous NGO in a Poland undergoing transition to an open-market economy

Instead, as might be expected, the lessons learned refer to changes in design that have been made or should have been made by the subgrantee (OIC Poland) or, occasionally, by the grantee (OIC International), to update and modify the logical, intelligently conceived plan undergoing implementation -- modifications that have made of the projected training institution a dynamic, successful operation, generally considered by Polish government officials at regional, voivodship and local levels, and by USAID Warsaw, to be among the most effective, if not the most effective, of indigenous Polish NGOs

The examples cited in this Chapter are summarized from findings conclusions and recommendations detailed in this evaluative report, or in the earlier Mid-Term Report Reference citations are identified in italics, by report section and/or illustrative figure

There follow a number of important lessons learned They are not listed in their order of importance, but rather in a loosely related series of points to be made

### Lessons Learned Regarding the Program

#### 1 ADAPT PROGRAM DESIGN TO RESPOND TO PRIORITY UNFORESEEN NEEDS

To optimize program effectiveness by serving the target beneficiaries in key, originally unforeseen problem areas, OIC Poland sought to identify relevant target beneficiaries in greatest need and inaugurated, for them, training in various areas not included in the project design Examples of this flexibility included

A Courses for women The Program design did not envision special training for Polish women, who comprise between 55% to 65% of the unemployed seeking jobs through regional labor offices, and who find it harder to obtain employment than men. Upon becoming aware of the fact, OIC Poland specially designed "The Successful Woman" workshop for single mothers, unemployed women and women seeking new employment -- training 177 of them through March 1995 [Section III-B & Figure 7] (NB, the OIC recently inaugurated a short follow-up psychology/assertiveness course for women.)

B Computer training After the serendipitous discovery that Solidarity had acquired 16 computers it was not using, and that there was great need for computer training among the jobless, OIC Poland agreed with the labor union to establish a training center to focus initially on teaching the basics of the personal computer, and to later expand to more specialized computer training for the unemployed and those desirous of upgrading their skills. By March 1995, the OIC had provided computer training to 1,351 men and women, thereby enhancing their employability [Section IV-D & Figure 9]

C Major conferences, seminars and workshops of national and international scope Program design had not envisioned that OIC Poland would find itself assisting the European NGO community and -- at the same time gaining widespread national and international recognition -- by conducting two major events in consecutive years. The 1992 "Conference on the Role of NGOs in Promoting Economic Development," a joint-effort with the U.S. Peace Corps, attracted high-level Polish Government notables, and American and multilateral officials. The 1993 "Lessons-Learned and New Directions Workshop re NGO Development in Central and Eastern Europe," attracted USAID officials and NGO/PVO officials from eight nations [Section V-A]

o Strengthening the business consulting/advisory profession While designing initial courses for business persons, the OIC discovered that -- because private enterprise had not been encouraged under Poland's former directed economy -- there was a scarcity of business consultants/advisors to whom its clients could turn for follow-up assistance. To help build that profession, the OIC conducted two workshops on the basic elements of consulting theory and practice for 74 members [Section IV-F & Figure 4]

## 2 REORGANIZE THE NGO'S TRAINING STRUCTURE WHEN NEEDED

Arriving in Poland, the Mid-Term Evaluation Team had found that OIC Poland's training activities were divided into three separately staffed units, each with its own manager who reported directly to the Executive Director. One unit theoretically focused on job-preparation training for the unemployed (including students), a second concentrated on training and advisory services for business persons, and a third on the use of the computer. However, the first two units featured so similar an approach and content to training that OIC instructors found themselves teaching courses in both units, and would-be trainees as well as instructors became confused over which courses applicants should take. After OIC management -- pursuant to the evaluators' recommendations -- unified training activities under a single deputy director, the duplication of effort was eliminated and training efficiency increased [For details, see Section X-C of the report, *Mid-Term Evaluation of OIC Poland's Program*, dated January 1994.]

### 3 REDESIGN COURSE CURRICULUM TO BETTER MEET CLIENT NEEDS

The curriculum for the OIC's (American-based) basic course for potential and active entrepreneurs, "ABCs of Small Business Creation," originally had three modules: awareness (introduction to business, entrepreneurship, needed personality traits), orientation (additional information re business climate, financial and legal aspects), and business planning. Within several months, post-course trainee reactions caused the OIC to make major curriculum changes that better adapted it to the specific needs of its participants. Much of the original general material disappeared, the important subject of marketing was introduced, and added stress was placed upon the legal and tax frameworks within which Polish businesses operate -- in effect, "Polonizing" the original concept. [Section IV-A of this report and Section V-A of the Mid-Term Evaluation]

### 4 PERIODICALLY UPDATE LOGFRAMES

Because economic and political conditions can change swiftly -- and because feasibility study fact-finders and program designers are subject to human error -- a developmental program normally undergoes marked change in implementation. If the program's original Logical Program Design Matrix (Logframe) remains unchanged, it is out of date by the time an OIC (or other recipient of USAID financial support) has been operating for year or two. Hence, programmatic evaluation based program performance as defined by outdated and/or no longer relevant verifiable indicators leads to skewed findings. This is true for OIC Poland's Humanitarian/Humanitarian Assistance Program.

In spite of the fact that the OIC's Mid-Term Evaluation noted the lack of realism of the Logframe indicator that 400 students are to complete OIC Poland's "Preparing to Enter the Job Market" course for secondary school students by the conclusion of the project (there are 3,300 to date), and that 23 teachers are to be trained to teach the course by September 1995 (291 have been to date) -- the Logframe never has been updated. [Section III-A & Figure 4]

Furthermore, the unanticipated-by-program-design (a) courses for women, (b) computer training and (c) major conference/workshops initiated by OIC Poland and cited, respectively, in 1 A, 1 B and 1 C above -- resulted in a total of 1,675 training outputs by March 1995 -- goals for which have never been incorporated into the program's Design Matrix.

It should be grantee and subgrantee policy to modify the program Logframe to take into account lessons learned in implementation. At the latest, the revision should take place immediately following the program's formal mid-term evaluation. Unrealistically high Logframe output indicators often cause grantees and subgrantees problems if unchanged by the time an evaluation takes place. Fortunately, OIC Poland's problem with out-of-kilter totals is far less serious. As noted above, they tend to be underestimates of realistic accomplishment. But such differences cast doubt on the realism of the program design and, hence, should be corrected.

### 5 MULTIPLY OUTPUTS, AND HUSBAND SCARCE HUMAN AND FINANCIAL RESOURCES, BY TRAINING TRAINERS

After the "Success on the Job Market" workshop had been conducted for several months, OIC realized that the attainment of the 650 unemployed-person Logframe goal threatened to overwhelm its limited training staff. Hence, although not originally envisioned in the pro-

gram design, the OIC taught 15 regional labor officers how to conduct the OIC course to their on-site unemployed clients. This evaluation report notes that, through March 1995, the labor-office trainers had conducted the OIC course 47 times to a total of 454 unemployed clients, with marked success. OIC Poland seldom fails to take advantage of the multiplier effect of either training others to conduct authorized sessions of its courses and workshops, or using qualified local consultants, rather than staff, to partake in relevant portions of courses conducted at OIC headquarters. [Section III-B & Figure 7]

#### 6 CONDUCT BASIC BUSINESS PROBLEM SOLVING IN SMALL GROUPS, RATHER THAN IN INDIVIDUAL ADVISORY SESSIONS

In a situation somewhat similar that discussed in (5) above, OIC Poland discovered, over time, a predictable pattern and great duplication in the one-on-one advice and counsel sessions it was providing to potential and actual entrepreneurs and small business persons who came to its office for assistance. Following a year's experience, during which OIC specialists helped approximately 175 of those clients on an individual basis, the NGO replaced the sessions with a series of short, specialized problem-solving workshops, through which small groups of entrepreneurs and small-scale business persons are taught how to resolve similar or identical problems -- accomplishing the same end in a more cost-effective way. [Sections IV-B, IV-C & Figure 8]

#### 7 THE OIC'S STRESS UPON MOTIVATIONAL TRAINING HAS POWERED ITS SUCCESS AMONG CLIENTS AND PUBLIC AGENCIES

OIC International and its affiliate NGO learned long ago that a major adverse impact of long-term unemployment is loss of motivation and diminution of job-search activity, and that, conversely, a positive, active, job-search attitude promotes job-finding. For those reasons, all OIC Poland courses for unemployed adults, secondary school students, and prospective entrepreneurs and small-scale business persons, contain a strong motivational module. The module generally includes self-assessment (evaluation of one's strengths, weaknesses, personality features and career preferences), developing self-confidence, overcoming limitations, learning to make decisions, the advantages accruing from good grooming and work habits, and so forth. OIC Poland's motivational training module has attracted widespread favorable comment and is considered unique by many. Interviewees after interviewees contacted by the End-of-Project evaluators -- teachers and their supervisors, voivodship and regional labor office officials, and municipality and voivodship executives, alike -- cited the beneficial impetus that the motivational module has provided to OIC graduates. It is a module that other NGOs are sure to find productive. [Sections III-A, III-B, III-c & IV-A]

#### 8 COURSES THAT PROVIDE PEOPLE WITH SKILLS CAN GENERATE INCOME

By combining the OIC's productive motivational approach with instruction in specific job skills, the NGO has developed, and continues to develop, a series of specialized, problem-solving workshops for business persons that attract participants to the courses and, importantly, generate fees for the program. This is especially true for OIC Poland's new, more intensive and/or longer-duration workshops to upgrade employees of larger-scale, complex organizations. Many of the workshops also provide computer training. [Sections IV-B and IV-D]

## 9 AN ALERT, FAST-MOVING NGO FILLS VACUUMS ADVANTAGEOUSLY

A 1994 OIC market survey to set the subject-matter and fee parameters for new, income-generation-oriented workshops discovered the need for a course to train unemployed women in a combination of skills: computer, secretarial science, administrative assistant and office manager. The resulting 200-hour "Secretary-Personal Assistant Course" comprises 128 hours of computer training and 72 hours of language communication, motivational training and skills training. Midway through the first course (scheduled to end December 1994) -- and after half the trainees had been promised jobs -- the OIC realized that the course was producing trainees with strong marketable skills. Accordingly, it moved quickly to capitalize on the trend by pushing forward start of the second course to November 1994, and began a third course in March 1995. [Section IV-D]

N B , OIC Poland's current training activity in the field of human resources management (i e , the recent "Human Resources Management Workshop for Personnel Managers" that generated significant income for the program in January 1995, and the projected "Human Resources Management Workshop for Resource Management Department Executives") represent speedy OIC reactions to the interest in human resources management engendered by its "1994 Polish Workforce 2000 Conference," which focused on that subject. [Section V-C]

## 10 TO DETERMINE THE QUALITY OF NGO TRAINING, FOLLOW-UP ON TARGET BENEFICIARY SUCCESS RATES

The NGO's Mid-Term Evaluation report noted that OIC Poland's goal was not simply to train business persons, but rather to upgrade their skills so that they increase incomes and develop jobs for others, and that its task was not simply to motivate the unemployed to seek jobs, but to help make them employable. The earlier evaluation recommended that, because donors demand objective indicators of training results, the OIC "should conduct, by mid-1994 at the latest, a comprehensive follow-up of its trainees and their subsequent enterprise and employment histories." OIC Poland followed through on the recommendation with a comprehensive August 1994 Monitoring survey of Clients, which found positive results from the NGO's training activity. In March-April 1995, the End-of-Project evaluators conducted a complementary survey of completers of the OIC's business, computer and "Success on the Job Market" courses that validated the conclusions of the earlier study. [Section V-D of the Mid-Term Evaluation Report, and Sections VI-A and VI-B & Figures 11-14 of this End-of-Project Report]

## 11 STRONG SUPPORT FROM RELEVANT GOVERNMENT AGENCIES REQUIRES CLOSE, CONTINUING CONTACT WITH THEIR OFFICIALS

OIC Poland has done an excellent job of working with teachers, supervisors, kuratoria, and others of the educational community at the regional, voivodship and local levels -- activity that has paid great dividends in the proliferation of secondary schools offering its "Preparing to Enter the Job Market" course, and the high regard in which the elective is held by those who use it. The OIC also targets promotion at teacher/principal meetings organized by voivodship education and labor authorities, school fairs, the news media and libraries. Unfortunately, its contacts with Ministry of Education officials in Warsaw, and knowledge of that Ministry's inner workings and the long-term implications of relevant plans regarding job preparation training, generally have not been that extensive -- leaving the OIC uncertain about the future of its course. [Section III-A]

## Lessons Learned Regarding People

### 12 WISE NGOS BENEFIT FULLY FROM THE EXPERIENCE AND CONTACTS OF THEIR COMMUNITY BOARDS

This evaluation and past assessments of other OIC affiliate programs agree that pro bono dedication, commitment and generosity in terms of time and effort are hallmarks of the community-based volunteer boards of directors who set OIC policy. That certainly is the case with OIC Poland's non-political Board of Directors (and Assembly of Founders), whose hard-working members bring great strength and perspective to the program, through their diverse sets of relevant public-service, civic-service and business backgrounds and experiences [Section IX-A]

In other programs, the external leadership positions of board members may interfere with their service and availability to the NGO. Fortunately, that is not the case at OIC Poland. However, to date, and with the possible exception of its Chairman, member of the OIC's Board do not appear to take advantage their extensive contacts and local, regional and national reputations by participating actively in the Foundation's vitally important, continuing resource mobilization drive among government officials and international donors. They should be encouraged to do so.

### 13 LOSS OF GOOD STAFF PERSONNEL IS A PRICE OF LEADERSHIP

In the closing months of 1994, OIC Poland lost the services of three experienced key staff members: its then (a) Deputy Director for Programs, (b) Business Incubator Specialist and (c) a Trainer for Unemployed Women and the Handicapped. The first was picked up (at a greatly increased remuneration) by a international project headquartered in Lublin, the second left to become mayor of a neighboring municipality, and the third became a self-employed consultant teaching NGOs about strategic planning strategies she had learned at an American institute for policy studies and at OIC Poland. Today's Poland has a large demand for professionals -- especially from well-respected organizations that, like the OIC, are in the forefront of creative, resultful new initiatives. To an extent, OIC Poland can combat the threat of continuing loss of key personnel by providing them with professional opportunities and raising their remuneration. But salary levels at indigenous not-for-profit organizations have strict limitations. Unfortunately the periodic loss of key, experienced personnel may be a price that the OIC has to pay for leadership and effectiveness.

### 14 LAVISH USE OF FOREIGN CONSULTANTS CAN TRANSFER NEEDED TECHNOLOGY SPEEDILY AND EFFECTIVELY

Because market-economy practices and techniques, and business development, had not been taught in Polish universities and faculties of economics during the 40 plus years of communist domination, few of OIC Poland's bright, creative and young (average age 32 year-old) staff started employment at the NGO without relevant theoretical knowledge of the training it which it specializes. For that reason, the project design called for massive infusions (20% of the total Grant funding) of specialized know-how on the part of foreign (mostly American) OIC International consultants/advisors. Thanks to their assistance, and to short, program-financed study-tours for key OIC trainers in the U S , the transfer of technology has been rapid and successful. It is no longer needed to the degree it once was,

and the OIC's proposal to USAID Warsaw for additional funding scales back future use of foreign consultants and advisors to a great extent [Section II-A, Chapter VIII & Figures 1, 2, 15 and 16]

15 HOWEVER, INCREASE USE OF LOCAL CONSULTANTS  
AS SOON AS PRACTICABLE

Page 33 of the OIC Poland Mid-Term Evaluation Report noted that "Research by the evaluators reveals that Poland's stock of native-born consultants with business-development and/or economic development competence is significant and growing," and echoed an OIC Board member's recommendation that "the program would benefit from increased use of qualified Polish consultants during the remainder of the Grant " The OIC heeded the advice during the first 12 and-a-half months of the USAID/EUR Grant, Polish consultants accounted 3 5% of budget, while during the following 19 months, they accounted for 8 0% of budget (N B , current USAID Warsaw policy also stresses the importance of using indigenous consultants to a maximum extent ) [Section VIII-A of the Mid-Term Evaluation Report and Section II-A & Figure 2 of this End-of-Project Report]

16 LOCAL EVALUATORS ON THE TEAM CAN PROVE INVALUABLE

Invaluable services were provided by the two Polish evaluators on the team that conducted this End-of-Project assessment The member who formerly had been Poland's Minister of La-bor and Social Policy was able to develop data from Ministry sources demonstrating that the number of jobs resulting from OIC Poland training had saved the Polish Government the equivalent of US\$ 1,000,000 in unemployment and family payments, through August 1994 And the educational and international-donor-agency background of the Polish evaluator who focused on the progress and problems of the OIC's school program provided key relevant insights lacked by other team members [Section III-A and Section VII-B]

## Appendices

**SCOPE OF WORK**  
**End-of-Project Evaluation of OIC Poland**  
**(USAID/OICI Cooperative Grant Agreement No EUR-0032-A-00-**  
**2085-00)**  
**March - June 1995**

**I AIMS**

The evaluation is to measure the progress that OIC Poland has made towards fulfilling ultimate objectives regarding operational status and institutionalization that are specified in subject Grant Agreement - - particularly since the Mid-Term Evaluation. More specifically, the evaluation objectives include

- 1 Impact of the program and the differences it made to the Lublin area and elsewhere in Poland and the region, and to its target beneficiaries
- 2 Comparing actual versus planned progress in terms of inputs delivered, outputs produced and progress accomplished towards program purpose
- 3 Assessing the validity of the project design in terms of (a) major assumptions, (b) the causal relationships or linkages hypothesized at the input, output and purpose levels, and (c) the time-frame with which project objectives are to be achieved
- 4 Assessing the progress of OIC Poland towards institutionalization and sustainable development
- 5 Identifying factors favoring or constraining implementation and achievement of objectives, and examining possible means for eliminating or minimizing those constraints
- 6 Assessing the nature and adequacy of inputs provided by others including OICI, to OIC Poland

**II KEY EVALUATION ISSUES**

This End-of-Project evaluation will focus on the impact of OIC Poland -- on the differences it has made and the changes effected by the program -- and upon the OIC's management, administration and performance. In assessing the current operational status and state of institutionalization of OIC Poland, the evaluators will use the program's Logical Framework Design Matrix as the point of reference in assessing progress towards program objectives, the efficiency of methods employed to produce program outputs and its progress towards sustainability. More specifically, the evaluators' assessment will include, but not be limited to, the following

- 1 Impact of OIC Poland's courses and workshops and other services upon trainees -- vocational school students, the unemployed, and business persons (Impact to be measured by the evaluators through random surveys among sample numbers of participants as well as through a review of OIC Poland's 1994 internal assessment)
- 2 Quantification (as far as possible and feasible within evaluation expense and time constraints) of the positive savings in government expenditures -- human resource and financial -- that have accrued to public agencies through implementation of the OIC program
- 3 Progress and status of OIC Poland's Employment Preparation Services (Career Development Training) initiatives directed at vocational secondary school teachers, students and principals, and at women, the handicapped and unemployed

## Appendix A (continued)

- 4 Progress and status of its Small Business Advisory Services program, and other program initiatives, including Computer Training and business incubator
- 5 Progress in developing an institutional support base through a Board of Directors that provides guidance to the program, and management, technical and support staffs that operate the program
- 6 Status of OIC Poland management control systems, including administrative and financial controls, and development/use of critical program documents
- 7 Detailed review of the technical, financial and other support services provided to OIC Poland by OICI, USAID, Polish national, regional and local governmental agencies, and others
- 8 The program's resource mobilization and income-generation efforts
- 9 OIC Poland's progress towards institutionalization and replication, including development of new Interest Groups
- 10 Lessons learned from the program's progress and problems, to date, that can benefit USAID, OIC Poland's Board of Directors and staff, OICI program designers and implementers, and other partners and contributors

### **III METHODOLOGY AND MAJOR TASKS**

- 1 Evaluation team The principal evaluator and team leader will be Stanley A. Barnett, an independent consultant and specialist in NGO project design and evaluation, who led the Mid-Term external Evaluation of OIC Poland. Over the past 20 years, Mr. Barnett has evaluated numerous OIC programs on behalf of AID/Washington, USAID Field Missions, UNDP and OICI, he also has extensive background re small enterprise development programs in many parts of the world. Other team members will include Ms. Sravani Ghosh-Robinson, OIC International's Evaluation Officer and two Polish socio-economic development consultants.
- 2 Utilization of existing data Preparation for this evaluation primarily will involve the review of materials and reports that are available at OIC Poland's Lublin office. Additional data will be provided by OICI's headquarters in Philadelphia.
- 3 Consultation with key partners and contributors The evaluators will take into consideration the viewpoints and experience of the various partners of and contributors to the program. These include OICI, Poland OIC, pertinent Polish national, regional and local governmental entities, and relevant United States agencies.
- 4 Field work At OIC Poland's Lublin offices, the evaluators will review major program reports and documents, and consult with key Board and staff members. They also will interview representative principals and teachers of schools using the OIC's vocational school curriculum, representative numbers of students, the jobless and business persons who have participated in OIC training courses and workshops, and representatives of other partners in and donors to the program.
- 5 Evaluation Report If deemed desirable after conclusion of the Field Survey, Mr. Barnett and Ms. Ghosh-Robinson -- after return to the U.S. -- will debrief management and staff of OICI and USAID's Project Coordinator regarding major evaluative findings, conclusions and recommendations. The Final Evaluation Report will be submitted to OICI by 30 June 1995.

## APPENDIX B

### LIST OF KEY CONTACTS

Lech Antkowiak - Coordinator, World Bank Project/Ministry of Labor  
Czeslaw Bakota - Director, Secondary Electrical Vocational Schools, Bilgoraj  
Beata Binieda - Data Base/First Contact Specialist, OIC Poland  
Marta Bojanowska - Graduate, OIC Basic Computer Course  
Janina Brodowska - Teacher, Motorcar Vocational Schools, Lublin  
Wieslaw Brodowski - Deputy Director, Lublin Province, for Economic Affairs  
Adam Cichocki - Member, OIC Poland Board of Directors  
Aneta Czajkowska - Vocational Counselor, Gdansk Province Labor Office  
Laszek Czechowski - Director, Switnik Labor Office  
Maria Dudek - Training Specialist/School Program, OIC Poland  
Roman Dylewski - Training Administrator, Gdansk Province Labor Office  
Barbara Dymitrzak - Graduate, OIC Basic Computer Course  
Alina Fudali - Labor Market Expert, Zamosc Province Labor Office  
Jolanta Gawrylak - Graduate, OIC ABCs of Business Creation Course  
Tilahun Giday - Vice President, Field Operations, OIC International  
Leszek Gonka - Computer Training Center Manager, OIC Poland  
Greszta, Mr - Deputy Director, Zamosc Province Labor Office  
Renata Grunwald - Graduate, OIC ABCs of Business Creation Course  
Grzegorz Grzadzziel - Deputy Director, Lublin Regional Labor Office  
Ronald W Howard - Vice President, Planning & Development, OIC International  
Wieslawa Jakubczak - Graduate, OIC Basic Computer Course  
Radoslaw Jasinski - Executive Director, OIC Poland  
Dorota Jasiuk, Information Specialist/Business Trainer, OIC Poland  
Barbara Kalinowska - Graduate, OIC Success on the Job Market Course  
Anna Kapela - Graduate, OIC ABCs of Business Creation Course  
Stanislaw Kawalko - School Inspector, Zamosc  
Kazanowski, Mr - Director, Lublin Kuratorium  
Elzbieta Kiszczak - Graduate, OIC Basic Computer Course  
Lidia Koper - Graduate, OIC Success on the Job Market Course  
Teresa Koslowska - Graduate, OIC Success on the Job Market Course  
Tomasz Koziej - Teacher, Energy Sector Schools, Lublin  
Jan Kozlowski - Member, OIC Poland Board of Directors  
Barbara Kubot - Graduate, OIC Basic Computer Course  
Jacek Kuterek - Manager of Business Advisory Center, OIC Poland  
Malgorzata Langiewicz - Advisor/First Stop Shop/Business Incubator, OIC Poland  
Irena Lesic - Chief Accountant, OIC Poland  
Ewa Lipowska - Public Relations/Marketing Officer, OIC Poland  
Jerzy Losiak - Graduate, OIC ABCs of Business Creation Course  
Jolanta Lotuszko - Graduate, OIC Basic Computer Course  
Majer, Nina - Deputy Chief, Development Resources, USAID Warsaw  
C L Mannings, CEO and President, OIC International

Appendix B (continued)

Irena Maron - Graduate, OIC ABCs of Business Creation Course  
Artur Mazurek - Business Trainer/Income-Generation Manager OIC Poland  
Bozena Mazurek - Secondary Vocational Schools, Piaski  
Halina Melgies - Graduate, OIC Basic Computer Course  
Iwona Migryd - Graduate, OIC Success on the Job Market Course  
Krzysztof Miła - Coordinator of Enterprise Promotion, Ministry of Labor  
Katarzyna Mitrut - Deputy Director for Operations, OIC Poland  
Krystyna Mroz - Graduate, OIC Basic Computer Course  
Jolanta Mulak - Graduate, OIC Basic Computer Course  
Danuta Nieczydor - Graduate, OIC ABCs of Business Creation Course  
Quy D Nguyen - Vice President, Administrative Services, OIC International  
Iwona Nowak - Graduate, OIC Basic Computer Course  
Stanisław Nowakowski - Deputy Education Officer, Zamosc Province  
Justyna Orzechowska - Secretary, OIC Poland  
Małgorzata Osinska - Training Specialist for Women & Handicapped, OIC Poland  
Anita Ostep-Karpinska - Administrative Assistant, OIC Poland  
Czesław Osuch - Teacher, Secondary Electrical Vocational Schools, Bilgoraj  
Jan Pakula - Director, Electrical Technicians Vocational Schools, Zamosc  
Pablo Pazymino - Director of Finance, OIC International  
Marian Piłkula - Graduate, OIC ABCs of Business Creation Course  
Monika Pieniak - Participant, OIC Women's Assertiveness Course  
Małgorzata Podolak - Graduate, OIC Success on the Job Market Course  
Tomasz Potkowski - Program Specialist, USAID Warsaw  
Donald Pressley - USAID Representative/Warsaw  
Elżbieta Rojewska - Graduate, OIC ABCs of Business Creation Course  
Andrzej Rozanski - Deputy Director for Programs, OIC Poland  
Anna Rudzińska - Participant, OIC Women's Assertiveness Course  
Renata Ryczek - Graduate, OIC ABCs of Business Creation Course  
Andrzej Rycerz - Director, Lubartow Secondary School Group  
Bożena Samodulska - School Inspector, Lublin Kuratorium  
Elżbieta Samplawska - Project Specialist, USAID/Warsaw  
Henryka Siarkowska - Graduate, OIC Basic Computer Course  
Barbara Siebielec - Participant, OIC Women's Assertiveness Course  
Alicja Sobczynska - Training Specialist for the Unemployed, OIC Poland  
Ryszard Straszynski - Resource Mobilization Officer, OIC Poland  
Stefan Stefaniak - Teacher, Lublin Secondary Vocational School No 1  
Nicholas Studzinski - Director, Office of Development Resources, USAID Warsaw  
Piotr Suski - Graduate, OIC ABCs of Business Creation Course  
Josef Swietlicki - Director, Secondary Vocational Schools, Piaski  
Ewa Szwaja - Graduate, OIC ABCs of Business Creation Course  
Mieczysław Taraszkiewicz - Director, Adult Education Dept, Lublin Kuratorium  
Danuta Toroj - OIC-trained teacher at Lubartow Secondary School Group  
Agnieszka Tymiche - Graduate, OIC Success on the Job Market Course  
Stanisław Weglarz - Chairman, OIC Poland Board of Directors  
Niemczynowska Wiesława - Graduate, OIC Basic Computer Course  
Włodzimierz Wojciechowski - Member, OIC Poland Board of Directors  
Grazyna Wojcik - Graduate, OIC Success on the Job Market Course  
Halina Wróblewska - Graduate, OIC Basic Computer Course  
Henryk Wysocki - Graduate, OIC ABCs of Business Creation Course  
Eliza Zajac - Participant, OIC Women's Assertiveness Course  
Elżbieta Zak-Rosiak - Deputy Director for Employment, Ministry of Labor  
Helena Zup - Teacher, Secondary Vocational Schools No 1, Bilgoraj

President  
of the Polish Republic

Warsaw September 22 1994

To the Participants  
of the Workforce 2000 Conference

Ladies and Gentlemen

As you probably know, I am not only President of the Polish Republic but also a senior trade unionist. I happened to create the first in the communist part of Europe independent and self governing trade union. Thus I understand (and can evaluate and appreciate) the needs of employees. I am able to comprehend them in such a degree that I know how important is the co-operation of employers. There are two sides of the same coin and if the coin is to be valuable they must shine in the same way.

An adequate personnel policy is not only a way of increasing profits. The motto of the conference is: Improving the business performance through better human resources management. An adequate personnel policy also means making the production process safer. Every mistake causes conflicts among the employees and thus the production process is felt to be more uncertain and thus less effective.

I wish the First Conference of Employers Workforce 2000 fruitful and positive proceedings. And I also wish the conclusions from the conference were an engine capable of powering our economy.

Lech Wałęsa



Prezydent  
Rzeczypospolitej Polskiej

Warszawa dnia 22 września 1994 roku

Do Uczestników  
Konferencji Pracownik 2000

Szanowni Państwo!

Jestem - jak zapewne Państwo wiecie nie tylko Prezydentem Rzeczypospolitej Polskiej ale i starym działaczem związkowym. Przypadło mi w udziale utworzenie pierwszego w komunistycznej części Europy niezależnego i samorządnego związku zawodowego. Rozumiem więc (i jestem w stanie docenić i ocenić) interesy pracowników. Jestem je w stanie pojmować tak dalece że wiem jak ważna i jak znacząca jest współpraca pracodawców. To dwie strony tego samego medalu i jeżeli medal ma być wartościowy muszą błyszczeć jednakowo.

Właściwa polityka personalna to nie tylko droga do zwiększania zysków. Hasłem przewodnim konferencji jest: Zwiększamy nasze zyski przez dobrze zorganizowaną i prowadzoną politykę personalną. Właściwa polityka personalna to także droga uczynienia procesu produkcji bardziej sprawiedliwym. Każdy popełniony błąd konfliktuje z interesem i powoduje że proces produkcji jest odczuwany jako bardziej uciążliwy i tym samym mniej wydajny.

Życzę Pierwszej Konferencji Pracodawców 'Pracownik 2000' pomyslnych i owocnych obrad i aby wnioski które z niej wypłyną były motorem zdolnym napędzać naszą gospodarkę.

Lech Wałęsa



Embassy of the United States of America

Warszawa, Polska  
1 grudnia 1994

W P Stanisław Węgiarz  
OIC Poland  
ul Szewska 4  
20-086 Lublin

Szanowny Panie,

Byłem pod ogromnym wrażeniem energiczności i profesjonalizmu Pańskich pracowników w czasie naszej ostatniej wizyty u Państwa. Praca wykonywana przez Państwa jest bardzo potrzebna w okresie przemian demokratycznych i ekonomicznych zachodzących aktualnie w Polsce. Szczególnie ekscytujące było zapoznanie się z Państwa przedsięwzięciem prowadzonym przez Polaków dla Polaków. Liczba osób, którym Państwo pomogli w ciągu ostatnich 18 miesięcy jest imponująca i powinni być Państwo dumni z tego sukcesu.

Dziękuję bardzo za danie mi szansy zapoznania się z pierwszej ręki z pracą, którą wykonujecie.

Pozostaje z powazaniem,

Nicholas A. Rey  
Ambassador

Warsaw, Poland  
December 1, 1994

Dear Sir,

I was greatly impressed by the energy and professionalism of your employees during our last visit to your Foundation. The work you do is very important during the period of democratic changes that are taking place in Poland. The most exciting was the possibility to learn that your program was organized by Poles for Poles. The number of people you helped during the last 18 months is impressive and you should be proud of that success.

Thank you very much for the opportunity to learn the work you do at first hand.

Yours sincerely,

Nicholas Rey  
Ambassador

Governor of Lublin  
Province

Lublin, January 1996

**Polish Foundation of Opportunities  
Industrialisation Centers OIC Poland**

Radosław Jasinski  
Executive Director  
ul Szewska 4  
20 086 Lublin

I would like to express my interest and support for the operations of Opportunities Industrialisation Centers of Poland OIC Poland in Lublin.

The programme of active struggle against unemployment, eg secondary school curricula, workshops and conferences, as well as Business Support Center may considerably stimulate the economic development of our region and help create new jobs

I highly evaluate programs prepared and implemented by OIC Poland as they directly meet the demands and needs of the local community

Wiesław Brodowski  
Deputy Governor

Wicewojewoda  
Lubelski

Lublin, Styczeń 1996

**Polska Fundacja Ośrodków  
Wspomagania Rozwoju Gospodarczego  
OIC Poland**

Radosław Jasinski  
Dyrektor Generalny  
ul Szewska 4  
20 086 Lublin

Pragnę wyrazić moje zainteresowanie i poparcie dla działalności Polskiej Fundacji Ośrodków Wspomagania Rozwoju Gospodarczego OIC Poland z siedzibą w Lublinie

Proponowane przez Fundację aktywne formy walki z bezrobociem jak np program edukacyjny dla szkół średnich, szkolenia i konferencje, a także Ośrodki Wspierania Przedsiębiorczości mogą w istotny sposób przyczynić się do rozwoju gospodarczego regionu i tworzenia nowych miejsc pracy

Wysoko oceniam programy opracowane i realizowane przez Fundację gdyż są one odpowiednią odpowiedzią na potrzeby lokalnej społeczności

Wicewojewoda  
Wiesław Brodowski

MINISTERSTWO  
EDUKACJI NARODOWEJ  
Al. Solid 25  
00 918 WARSZAWA

Warszawa

DKO-4030-158/94/WS

8 09 1994

Sz Pan  
Radosław Jasiński  
Dyrektor Generalny  
Polska Fundacja Ośrodków  
Wspomagania Rozwoju Gospodarczego

ul Szewska 4  
20-086 LUBLIN

WPLYNEŁO-L OZ

D I C POLAND

Szanowny Panie

W imieniu Pana Ministra dziękuję Panu za nadciśnięte materiały dydaktyczne i programy dotyczące przygotowania do wejścia na rynek pracy. Wszyscy mamy świadomość jak przetrwać jest ta tematyka w sytuacji wolnego rynku pracy. Byłoby gdyby z tymi materiałami mogli się zapoznać konsultanci z wojewódzkich ośrodków metodycznych.

Również w imieniu Pana Ministra na Pana ręce składam gorące podziękowania za dotychczasową działalność edukacyjną Fundacji. Jednocześnie chciałbym zapewnić że przesłane materiały zostaną przedstawione uczestnikom prac nad nowymi postaciami programowymi i programami nauczania z zakresu kształcenia ogólnego.

Z poważaniem

DYREKTOR DEPARTAMENTU

mgr Mirosław S. I. I. I.

On behalf of the Minister of Education I would like to thank you for the teaching materials and curriculum guidelines for the school course "Preparing to Enter the Job Market" you sent to us. We all are aware of the fact how useful this subject is in the free market economy. It would be useful if consultants from Voivodship Methodology Centres could be presented the materials.

On behalf of the Minister, I would also like to thank you for the past educational activities of the Foundation. At the same time I would like to assure you that the materials you sent us will be presented to people involved in preparing new programs and curricula for secondary comprehensive schools.

Yours sincerely

Director of the Department

1995 SURVEY OF OIC POLAND COMPLETERS OF JOB MARKET COURSES

Name of OIC Participant \_\_\_\_\_ Gender \_\_\_\_\_

Address \_\_\_\_\_

Name of OIC course (e.g. "Success on the Job Market" "The Successful Woman" etc) \_\_\_\_\_

\_\_\_\_\_ Date OIC training completed \_\_\_\_\_

1 Were you unemployed at the time of your OIC Poland training? YES \_\_\_ NO \_\_\_

2 If you are now employed, what is the name and address of your employer? \_\_\_\_\_

3 If employed, check starting status \_\_\_ Permanent, \_\_\_ Short-term, \_\_\_ Temporary -contract

4 If employed, check current status \_\_\_ Permanent, \_\_\_ Short-term, \_\_\_ Temporary -contract

5 If employed, what is your current position or title? \_\_\_\_\_

6 Did your training at OIC Poland help you to obtain a job? YES \_\_\_ NO \_\_\_

7 What were the three most useful things you learned in your OIC course? \_\_\_\_\_

(a)

(b)

(c)

8 Which subjects were least helpful in your job search? \_\_\_\_\_

9 What would have made the course more helpful to you? \_\_\_\_\_

1995 SURVEY OF OIC POLAND COMPLETERS OF COMPUTER COURSES

Name of OIC Participant \_\_\_\_\_ Municipality \_\_\_\_\_

Address \_\_\_\_\_

Name of OIC course (e.g. "Basics of the IBM PC," "Word for Windows" etc ) \_\_\_\_\_  
Date OIC training completed \_\_\_\_\_

1 Were you unemployed at the time of your OIC Poland training? YES \_\_\_ NO \_\_\_

2 If you are now employed, what is the name and address of your employer? \_\_\_\_\_

3 If employed, check starting status \_\_\_ Permanent, \_\_\_ Short-term, \_\_\_ Temporary -contract

4 If employed, check current status \_\_\_ Permanent, \_\_\_ Short-term, \_\_\_ Temporary -contract

5 If employed, what is your current position or title? \_\_\_\_\_

6 If jobless, did your computer training at OIC help you to obtain a job? YES \_\_\_ NO \_\_\_

7 If "Yes," what job did you obtain? \_\_\_\_\_

8 Check type of job you obtained \_\_\_ Permanent, \_\_\_ Short-term, \_\_\_ Temporary -contract

9 If employed at the time of the course, did it help you get a better paying job? YES \_\_\_ NO \_\_\_

10 If "Yes " what new job did you obtain? \_\_\_\_\_

11 What did you like best about your OIC computer course? \_\_\_\_\_

12 What would have made the course more useful to you? \_\_\_\_\_

13 How did you learn of the course you attended? \_\_\_\_\_

14 Would you recommend that others attend OIC Poland business training? YES \_\_\_ NO \_\_\_

Date \_\_\_\_\_

Interviewer \_\_\_\_\_

1995 SURVEY OF OIC POLAND COMPLETERS OF BUSINESS WORKSHOPS

Name of OIC Participant \_\_\_\_\_ Municipality \_\_\_\_\_

Check One \_\_\_ Unemployed\_\_\_ ,Self-employed entrepreneur, \_\_\_Employee of a business

Name of Firm/Organization \_\_\_\_\_

Address of Organization \_\_\_\_\_ Location \_\_\_\_\_

Interviewee's Position/Title \_\_\_\_\_

Name of OIC workshop \_\_\_\_\_

\_\_\_\_\_ Date workshop completed \_\_\_\_\_

1 Did OIC instruction in the course(s) named enable you to do one or more of the following?

- \_\_\_ Become more realistic in job expectations      \_\_\_ Improve your management skills
- \_\_\_ Obtain a job      \_\_\_ Improve your marketing skills
- \_\_\_ Obtain a new, better job where you work      \_\_\_ Make more money in your business
- \_\_\_ Establish a new business      \_\_\_ Employ more people in your business
- \_\_\_ Expand an already established business      \_\_\_ Expand knowledge of finance and legal aspects of conducting business
- \_\_\_ Improve your business planning skills

2 Did the training meet the expectations you had at the start of the workshop? YES \_\_\_ NO \_\_\_

3 What were the most useful three things you learned? \_\_\_\_\_

(a) \_\_\_\_\_  
(b) \_\_\_\_\_  
(c) \_\_\_\_\_

4 How did they help you? \_\_\_\_\_

(a) \_\_\_\_\_  
b) \_\_\_\_\_  
(c) \_\_\_\_\_

5 How did you learn of the workshop you attended? \_\_\_\_\_

6 What would have made the workshop more helpful to you? \_\_\_\_\_

\_\_\_\_\_

7 Would you recommend that others attend OIC Poland business training? YES \_\_\_ NO \_\_\_