ENTREPRENEURSHIP INSTITUTES IN POLAND

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ENTREPRENEURSHIP INSTITUTES IN POLAND

Third Quarterly Report - Year III

January - March 1994

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

The goal of the project continues to encourage teaching of market economics education through business-type schools in Poland with emphasis on Entrepreneurship, Small Business Management, Marketing, Finance, Strategic Planning, Export-Import and Small Business Consulting. The strategy selected is to empower a large group of faculty in three universities to expand their competencies in teaching these courses. In addition, we have added six new seminars on *Retailing, Selling, Human Resource Management, Negotiations, Market Research* and *Team Building*. As a result, the faculty will develop curricula of the new seminars with the technical assistance of the OSU staff and consultants.

BACKGROUND

Poland has continued its fairly steady commitment to the free market over the past three years, despite radical economic shock therapy. Since last year, Poland has registered big improvements in the direction people see their country going and in general satisfaction with their democracy. The recent September 19 general election seems to have ushered in a "wait-and-see" attitude towards the new government. (*Warsaw Voice*, March 13, 1994)

The Polish ministry cuts out the State Treasury middleman to speed up privatization. There are still about 6,000 state enterprises in Poland (out of 8,500 in 1990). More than 35 percent of enterprises undergoing ownership changes are firms privatized through liquidation, which means they are stuck off the register with the aim of either selling them, contributing them to a new company or leasing them. This method is valid for small and medium-sized enterprises, and enables them to be privatized directly, without first being transformed into companies held in trust by the State Treasury. (*Warsaw Voice*, March 13, 1994)

Apart from the *Warsaw Voice*, we found another interesting source of information about Poland and other European countries - The Wall Street Journal Europe's *Central European Economic Review* (Winter 1994). Quarterly Economic

Review says that the country still enjoys the advantages of a big national market, a highly educated work force and low labor costs.

In an article entitled *Emerging Market* we found interesting information about the Warsaw Stock Exchange which is perceived as a success story of 1993. No more than a year ago the WSE attracted the attention of only a small number of people. A sudden rise in 1993 was caused by a combination of factors. Inflation dropped substantially, allowing the Central Bank to cut interest rates. The 1993 budget was approved with a reasonably low deficit despite the weak majority of Prime Minister Hanna Suchocka's cabinet. The industrial output had been growing for a number of consecutive months, and it became clear that the recession was over and that the economic transformation was starting to pay off. These factors made investors more optimistic about the stock market. It attracted more attention from foreign institutional investors. With the overall market index, the WIG, finishing the year with an astounding 1,099% higher in zloty terms and 875% higher in U.S. dollar terms. The most serious international investors expect Warsaw to become the financial center of Central Europe.

SCOPE OF WORK

The following information presents the scope of activities performed by the OSU staff, Solidarity Foundation staff, three Enterprise Institutes and their satellite-centers staff during the third quarter of Year III of this project. It is divided into nine standard tasks proposed for the continuation of the project. In addition, a calendar of activities for the Year III presents assigned monthly activities.

The Appendix to this report includes examples of the work and results of staff activities during this quarter. It is organized to support the nine tasks of the project, also. The pictures taken during this period are included to present the reader our American Consultants working with the three Institutes during this quarter. Reports on the results of each Institute activities are documented in Appendix 4.0.

1.0. Coordinate Program

During the third quarter of the Year III of the project the OSU staff continued working cooperatively with the Solidarity Foundation, the three Enterprise Institutes and their satellite centers to assist them to be independent in their activities.

The Solidarity Economic Foundation staff continued to provide valuable assistance to the project during the third quarter. They made weekly calls to the Institutes to coordinate activities and collect reports and evaluation forms on a monthly basis. They supervised the budgets for each site and handled problems on a timely basis.

During this quarter we were especially focusing on the implementation of short term courses in *Retailing, Selling, Human Resource Management,* the development of outlines and instructional materials for additional seminars in *Market Research, Team Building, Negotiation*, the completion of plans for upgrading seminars for the Institutes' faculty specializing in teaching *Marketing* course and the delivery of seminars in new established satellite centers.

While in Poland we met our coordinators of the project and members of task force meeting. We made site visits to the Solidarity Office in Gdańsk, and to each of the Institutes. During the site visits, Dr Cathy Ashmore attended *Retailing* seminar conducted in each site by Prof. Wayne Talarzyk and the assigned faculty. The agenda for each site visit was a follows:

* Review of Institute finances and accounting procedures
* Discussion of faculty issues (trainings, instructional material)
* Schedules for the balance of Year III
* Case study development
* Status of new seminars development
* Plans for Forum in May
* Status of Email connectivity
* Project implementation through satellite centers

We are very pleased with the activities of each site. We feel they are growing constantly in their ability to deliver the program and resources to new target groups.

During this quarter our consultant Dr. J. Turner concluded a three months (January-March), on-site consulting assignment to the three Polish-American Enterprise Institutes. The primary tasks assigned to this consultant were:

1/ to assist with instructional materials development for courses on *Human Resource Management* (Białystok) and *Salesmanship* (Rzeszów);
2/ to observe pedagogical skills of each Institute instructors and make recommendations for programmatic changes to provide assistance in the development of appropriate teaching skills as needed;
3/ to determine the feasibility of establishing Email capability via the Internet for each of the three Institutes locations.

Dr. Turner spent a series of two two-week periods in each Institute and worked with the faculty on the above tasks. In addition, Dr. J. Turner was requested to study and make suggestions regarding overall operations at each of the three Institute sites. (see detailed Consultant Final Report in Appendix 1.0.)

Numerous activities completed by Dr. John Turner included the following:

Poznań

1. Conference with instructors of Marketing Research course.
2. Presentation to 3rd year business students at Economic University - *Sales Promotion in a Market Economy.*
3. Preparation of outline for workshop to focus on pedagogical skills of the Institutes Instructors.
4. Participation in two-day instructors conference.
5. Presentation to teachers and administrators of Economic School in Leszno - *The role of Economic Education in Poland's Developing Market Economy.*
6. Assisted new Institute secretary to learn world processing program *AMIPro.*
7. Attended Total Quality Management class in Gorzów and made introduction to *ISO 9000* series of Quality Manufacturing Process.
8. Attended Tax class in Leszno.
9. Participated (along with project director) in presentation to teachers of secondary school and their administrators. That event was covered by local mass media.
10. Attended a meeting (along with Project Director and the Institute Director) with Vice Mayor of Voivodship and Public Relations personnel.
11. Toured *Poznań Consumer Goods Fair* with the assistance of the Institute Director
12. Assisted with presentation to Director of US AID for Poland, Donald Presley, during his visit to Poznań Institute.
13. Discussed evaluations of Finance class with the Institute Director and made recommendations regarding how to handle consultation with instructors.
14. Meeting with instructors responsible for the writing of Retailing Instructional Unit.
15. Email connection arrangement.

Białystok

1. Addressed an English language class at the University - *Comparison of U.S. and Polish Economies and Student Lifestyle.*
2. Addressed an English language class at the University and repeated topic from one above.
3. Presentation of *Human Resource Management* outline designed for a 12-15 hour short course, and a planning paradigm for setting up a course.
4. Attended the second day of a post graduate class to evaluate the pedagogical skills of the Institute instructors.
4. Toured *Everest* Furniture Company and interviewed regional managers.
5. Addressed third English language class at the University.
6. Initial attempts to send Email.

Rzeszów

1. Made one presentation to students of the post-graduate program *Observation regarding Polish manufacturing, distribution, retailing and infrastructure in relation to economic growth in the world market.*
2. Toured *Sanwil* plant in Przemyśl and interviewed plant manager
3. Toured *Bocemen* manufacturing company and interviewed controller and plant manager.
4. Attended the final business class for the unemployed in Krosno.
5. Presentation of the outline for the *Salesmanship* seminar.
6. Assistance in developing *Team Building* seminar.
7. Assisted in establishing Email via Internet.
8. Assistance in improving the Institute 's organizational structure and individual responsibilities of the Institute staff.

Dr. J. Turner assisted our coordinators in determining two possibilities of utilizing Email connectivity: 1/ connecting the Institutes to the University's Internet Node, and 2/ leasing an access and a number directly through NASK, Warsaw; that means to connect the Institute's computer to the Internet for Email capability. An estimated cost of this connection is $ 50-100 per month. There is also a one-time start fee of $ 75 - 150. At present, we can communicate through e-mail with Poznań and Rzeszów Institutes: <Pawelcza@novci1.ae.poz.edu.pl> and <Painprze@sam.nask.com.pl>. Due to the limited availability of Email capability via University facilities the Białystok Institute was recommended to lease a dedicated number directly from NASK, Warsaw. (more details on the issue in Consultant Final Report, Appendix 1.0.)

In Dr. J. Turner's summary we read "... The impact that the three Polish-American Institutes and their satellite operations are making on the Polish transition to a market economy is commendable. One only needs to sit in a class and attend one of the graduation activities to observe first-hand, the growth by individuals enrolled. The Institute staff are effectively reading market needs for instructional topics and in general, providing the appropriate level of teaching expertise and pedagogical process..."

More information about instructional material for new courses are contained in Task 3.0 and about Dr. J. Turner's observations related to pedagogical skill in Task 8.0.

During this quarter our Institutes continued delivering courses through their satellite centers. The faculty of the centers were taught by the faculty who currently teache the program at the Institutes. The satellite centers opened new markets for the Institutes' products and services. Growing demand for existing programs as well as for other programs goes beyond the immediate scope of the project and opens a window of opportunity for the Institutes.

While in Poland we visited the US AID office in Warsaw to meet Ms Nina Majer and to present current status of the project.

Much of the Solidarity staff time was spent this quarter on plans for the Entrepreneurship Forum in May. They arranged for the task force to be involved in this event and to meet prior to the Conference. A program of the III Forum entitled *Entrepreneurship and Regional Development* is presented in Appendix 9.0.

Solidarity Foundation supervised the work of the Institutes in terms of writing new cases which will be published in June, coordinated activities of task force, and organized coordinators meeting in Warsaw.

2.0. Establish Satellite Offices

Each Institute has continued delivering courses through their satellite centers.

The Institutes coordinators assisted their satellite cites in planning the implementation of the program and promotional campaigns through their local network as well as conducting the designed activities. New coordinators attended seminars conducted by other Institutes what gave them in-depth understanding of the program realization. In order to serve better the needs of their new communities the coordinators organized meetings with several representatives of local institutions who were interested in promoting the development of small businesses.

During this quarter the **Białystok Institute's satellite centers** offered the following courses:

- Satellite Center in Suwałki activity:

  * Tax seminar - 4 hours x 31 participants
  * Promotion of VAT - Tax seminar through local media: radio and newspapers
  * Basic course "Start in Business" addressed to persons being in business or planning to set up a small business on their own. This course was promoted through local newspapers *Gazeta Współczesna, Krajobrazy, Kurier Poranny* and *Kurier Podlaski*. It attracted 10 participants x 60 hours and included:
    Management
    Finance
    Marketing
    Business Law
    Taxes
  * Finance seminar: 10 participants x 6 hours

* Computer Application in Business course for students of the first, second and third year

The coordinators met the representatives of Agency for Regional Development *ARES* and Agency of Local Initiative in Suwałki to define mutual undertakings in the field of small business promotion. They made good connection with Chamber of Agriculture to have courses organized in the region.

- Satellite Center in Łomza activity:

  * Income Tax seminar - 6 hours x 6 participants:

The center established good relationship with Cooperation Fund to promote small business development in the region.

- Satellite Center in Bielsk Podlaski activity:

  * Tax seminar - 12 participants x 10 hours; attracted managers and owners of small businesses mostly running retail stores. It was advertised in local newspaper *Kurier Poranny*; very practical approach
  * Marketing course - 72 hours course for 26 participants from *UNIBUD* company - managers represented different departments of the company; the course consisted of:

    Marketing (56 hours)
    Finance (8 hours)
    Management (8 hours)

The completion of the Marketing Module for the *UNIBUD* company resulted in receiving a new request for new course by the center.

The center received also another request from Regional Labor Office to prepare and present a seminar for the unemployed who what to set up a small business on their own. The center is working on new seminar on "*Selling techniques*" to be conducted soon.

In February, the coordinators of the center attended a seminar on *Successful Retailing* conducted by Prof. Wayne Talarzyk with cooperation of Poznań Institute faculty.

After conducting feasibility study in the region, the center learned more about the needs of the market and scheduled several new seminars, e.g.: *A role of marketing in managing a firm, Changes in Tax regulations and small business development*, and *Forms of records*.

Rzeszów Enterprise Institute performed its activities through Satellite Centers located in Leżajsk, Przemyśl, Sanok and Krosno.

This quarter the satellite centers offered the following courses:

* Basic Course for entrepreneurs:

  - in Krosno - attracted 15 participants x 60 hours
  - in Przemyśl - attracted 15 participants x 30 hours
* Courses for investors:
  - in Przemyśl - 45 participants x 30 hours
* *Successful retailing* seminar in Przemyśl - 15 participants x 6 hours
* Continuation of teaching course in Przemyśl-Dubiecko for employees of Cooperative Banks.

During this quarter the **Poznań Enterprise Institute** performed its activities through satellite centers located in Konin, Leszno, Gorzów Wielkopolski and Gniezno.

- Satellite Center in Gorzów Wielkopolski activities:

  * Training for directors of state and private companies on Total Quality Management *ISO 9000 Series of Quality Manufacturing Process*; assisted by Dr. J. Turner and Z. Krajewski; attracted 38 persons x 8 hours
  * Marketing Module - "Salesperson partner" - attracted 11 persons x 16 hours

The center started cooperation with the Western Chamber of Commerce and Agency for Regional Development what would help the Center to expend its activity.

- Satellite Center in Konin activity:

  * Marketing Module - *Modern Selling Techniques* - attracted 16 persons x 10 hours

The center has been recognized by the Local Authorities as an important training unit in the region and signed an agreement about cooperation.

- Satellite Center in Leszno activities:

  * Finance Module - a seminar on *Stock Market* - attracted 65 persons x 8 hours

* Finance Module - a seminar on *Enterprise strategies during the changes in tax law* - attracted 16 persons x 16 hours
* Finance Module - *How to pay taxes?* - attracted 20 persons x 8 hours

Because of a rapid increase in unemployment, which is a very serious social problem, the Local Authority expressed its interest in cooperating with the center to promote the small business development in the region. The development of small businesses is perceived as a vehicle for job creation. As a result of the understanding of this market needs a Business Club was established to help to stimulate real business oriented environment. (Detail descriptions about the Leszno region and new Business Club are attached in Appendix 2.0.)

Dr. J. Turner visited the center to attend a tax class as well as to have a presentation to teachers and administrators of Economic School in Leszno about *The Role of Economic Education in Poland's Developing Market Economy*. The participants expressed their interest in introducing entrepreneurship module to high schools as well as training high school teachers in this area of expertise. The presentation was covered by local newspaper and broadcasting media.

- Satellite Center in Gniezno activities:

  * Promoting and conducting a seminar on "Enterprise Strategy" - attracted 15 persons x 6 hours
  * Sixty-hour Marketing course will be organized in May. This is twice as long as the normal course as a response to the market needs in this area.

The development of satellite locations in the Poznań area is a strong positive aspect for this Institute location. Satellite managers in Leszno and Gorzów appear to be strong leaders.

Business owners, managers, employees and other entrepreneurs in the satellite locations are in need of more basic marketing program than their business counterparts in the immediate Poznań area. This is the real market for the Institute activities.

3.0. Assist Faculty in Developing New Seminars

During this quarter the OSU staff continued to assist the Polish coordinators in conducting new short course in *Retailing, Selling,* and *Human Resource Management* as well as providing assistance in preparing instructional materials for another courses in *Team Building, Market Research* and *Negotiation*.

Details on the content of each seminar are included in Appendix 3.0. Materials of the six seminars will be presented in the last Quarterly Report.

During this quarter the following seminars have been accomplished:

Selling Seminar. The idea was to address the basic selling techniques that both the business owners and their employees need to use in market economy. It was prepared by Rzeszów Institute faculty with the assistance of Dr. John Turner and held February 17-18, 1994, in Rzeszów. Dr. J. Turner prepared initial outline for this short course (Appendix 1.0. - Consultant Final Report). The major topics of the seminar were as follows:

- The role of personal selling in market economy
- The salesperson: presenting a positive sale image
- Company, product and competition
- Customer and effective presentation

The seminar was attended by the faculty from the three Institutes and local specialists. The meeting was very productive and resulted in several decisions in terms of a selection of possible topics. Some of them may be used for retail sales personnel other for business to business sales personnel.

The same seminar was offered in other Institutes with the assistance of Rzeszów Institute faculty.

This *Selling* short seminar was also presented to 31 students of the post graduate program at the Maria Curie-Skłodowska University.

Successful Retailing seminar was originally designed, prepared, and presented by the faculty of Poznań Institute with the assistance of Prof. Wayne Talarzyk from the Ohio State University. This took place February 16-17, 1994 in Poznań and the following days in the next two Institutes. Prof W. Talarzyk and the director of the project Dr. C. Ashmore attended those three seminars.

The major topics of the seminar conducted by assigned academics and prof. W. Talarzyk included:

- Basic issues of retailing - Prof. W. Talarzyk, the OSU, Columbus
- A product and strategies of assortment; inventory control - Prof. Halina Szulce, Economics Academy, Poznań
- Customers service strategy - Wiesław Ciechomski, Economics Academy, Poznań

- Promotion strategy - J. Mikołajczak, Economics Academy, Poznań
- Accounting management and tax strategies related to retailing - Wachowski, Economics Academy, Poznań
- Responding to changes in retailing - Prof. W. Talarzyk, OSU Columbus

The participants tried to find answers to the very basic questions, e.g.:

- What is marketing?
- Is marketing an art or a science?
- Is marketing adaptive or formative?
- Is there a difference between selling and marketing?

After brainstorming they defined five key issues to the success in retailing:

1/ Understanding the changing environment
2/ Developing products/services to respond to the environment
3/ Pricing
4/ Distributing right products, at the right place and right time
5/ Communicating with consumers that we have the right product, at the right price, place and time.

Human Resource Management seminar which addressed strategies for managing employees in a small and medium sized business was primary designed by Białystok Institute faculty with the assistance of Dr. John Turner who prepared initial outline for the short course and a planning paradigm for setting up the course. (see in Appendix 1.0. - Consultant Final Report).

The major objectives of the seminar were to teach the participants:

- how to set up employees policy while managing a small business
- how to recruit new and keep old employees
- to understand the role of personal development
- to apply performance appraisal concepts
- to recognize the importance of small groups
- how to establish a compensation system
- understand the need of discipline, dismissal of employees as well as their promotion. (Appendix 3.0. includes Polish version)

Remaining seminars in *Team Building, Market Research* and *Negotiation* will be performed during the next quarter. In Appendix 3.0. transparencies and role play exercises have been attached.

4.0. Support Institute Leadership

In this section we present separate activities performed by each Enterprise Institute in Białystok, Poznań and Rzeszów. This includes their reports sent to us as well as information we collected in Poland.

BIAŁYSTOK

During this quarter the Białystok Enterprise Institute provided 11,842 hours of training courses to business owners and 600 hours of consulting to faculty, business owners and students.

The coordinators worked cooperatively with their instructors/teachers and community experts who served as teachers. The ten teachers worked on organizing the program and others were used occasionally as needed.

The coordinators traveled to Warsaw in February to attend the task force meeting in Warsaw. They also arranged a number of activities for Dr. Cathy Ashmore to be involved in on her site visit to Białystok. The agenda for this visit is included in Appendix 4.0.

The schedule of the Institute's courses was as follows:

* Basic Course for 10 Entrepreneurs x 35 hours in:
  - Entrepreneurship
  - Negotiations
  - Management
  - Computer application

* Management Course for 24 entrepreneurs (one-year long course):
  - Marketing
  - Finance
  - Business and Labor Law
  - Entrepreneurship
  - Strategic Planing
  - Business Plan

* Tax Course for 28 entrepreneurs (one- year long course)

* Secretarial School for 28 participants x 83 hours:
  Entrepreneurship
  Finance
  Marketing
  Management

* Human Resource Management seminar for 6 faculty x 6 hours

In addition, the faculty of the Institute attended seminars in *Marketing* in Poznań and *Successful Retailing* in Poznań and Białystok, *Personnel Selling* seminar in Rzeszów.

During Dr. John Turner's visit in Białystok Institute, the coordinators worked with him cooperatively on the final version of the seminar on *Human Resource Management*. He presented the outline designed for a short course and a planning paradigm for setting up the course. (Appendix 1.0.)

Dr. J. Turner tested Email capability of the Institute. Due to limited availability of Email capability via University facilities the Institute was recommended to lease a dedicated number directly from NASK in Warsaw. (more information reported under the portion of Consultant Final report in Appendix 1.0.)

While in Białystok, Dr. J. Turner attended the second day of the post graduate class to evaluate the pedagogical skill of the Institute instructors. Prof. Jan Jesek who conducted this class was very knowledgeable and used very effective approach for presenting his materials.

Classes planned by the Institute appeared to be very much on target regarding the practical needs of the business community. The level of participants' responses in the classes observed by Dr. John Turner indicated a high degree of interest in courses's content.

The Institute prepared several case studies which will be published by Solidarity Foundation next quarter (see new cases in Appendix 7.0.).

On February 20-23 Dr. Cathy Ashmore visited the Institute to check the current state of the project implementation as well to attend a new seminar in *Retailing* conducted by Prof. W. Talarzyk. She also met with the faculty of the Institute.

We feel that the Institute has established a strong position on the local market. It can be measured by the number of clients coming back to attend other courses as well as requests received from the same companies for new seminars.

In March the coordinators attended a conference of Advisory Committee of Entrepreneurship Institute and a meeting with representatives of US AID in Warsaw.

POZNAŃ

During this quarter the Poznań Enterprise Institute provided 3,964 hours of training to business owners and faculty.

The coordinators of the Institute cooperated on a regular basis with their 10 faculty and on temporary basis with 20 other academics. They also worked with 5-6 business specialists who served as teachers on the project.

This quarter, the Institute provided the following courses:

* Basic Course for 44 business owners
  Marketing
  Entrepreneurship
  Finance

* Banking Marketing course for 22 employees of a bank x 50 hours

* Marketing seminar for 18 students of the Undergraduate Bank College

* Faculty training seminar :
  Marketing
  Retail Management

* Basic Computer Operations for employees of the Automatics and Telecommunication Works of the Polish Railways - 10 participants x 50 hours

The coordinators of the Institute determined the major demand for banking trainings. Banking seminars appeared to become the opportunity for the future development. They prepared one-year college course in banking which became very popular.

In addition to the routine work the Institute started to specialized in writing business plan for enterprises, e.g. Prefabricated Elements Factory.

Each Friday coordinators of the Institute invited persons involved in the Institute activities to discuss current problems, to assist the coordinators of the satellite centers in their work.

In February, the coordinators traveled to Warsaw to participate in task force meeting.

In March, the Institute hosted Mr Donald Pressley from the U.S. AID office who attended a meeting with the coordinators, Dr. John Turner and R. Polcyn. During the meeting the coordinators presented a current status of the Institute development and its plans for the future.

With the assistance of Dr. J. Turner the Institute managed to obtain and use Email connection.

RZESZÓW

During this quarter the Institute provided 9,200 hours of teaching in the basic series of courses and 230 hours of consulting to business owners and faculty.

The Institute offered the following courses:

* Basic Course for entrepreneurs in Rzeszów
  entrepreneurship
  marketing
  management
  finance

* Personal Selling seminar - 46 participants

* Retailing seminar for 15 participants

* Post graduate study attracted 62 students

* Seminar for Investors in Przemyśl (representatives of *Sanwil* enterprise) and Rzeszów

The Institute in cooperation with the Economics Department of the Maria Curie-Skłodowska University continued conducting post-diploma studies for students.

The Institute with the assistance of Dr. John Turner managed to obtain and use Email connectivity. Plans include making the Internet available to members of the Entrepreneurs Club as an additional benefit.

The coordinators represented the Institute during the following events:

1/ a meeting with entrepreneurs-members of the Association of the Entrepreneurs SBI Century Club, the Regional Business Council, and Regional Movements of Commerce
2/ a meeting with the General Council of the United States Ms Dianne E. Markowitz in Cracow January 14, 1994
3/ a meeting with the Ministry of Privatization Mr. W. Kaczmarek and representatives of European Union and Polish Agency of Regional Development
4/ a meeting with representatives of Taiwan Development Association
5/ a lecture in Cracow on Capital Formation in the US during which Prof. Charle R.B. Stowe from Sam Houston State University gave a presentation on How Ordinary Americans Become Wealthy.

The Institute was asked to prepare an economic-financial analysis for Industrial-Land Works in Sieniawa.

Their promotional campaign included advertising of courses, offering market research and consulting services in mass media (in local newspaper, radio, on TV).

The Institute continued working with the business world through providing consulting services for about 20 managers representing a variety of businesses who seek professional advice from the Century Club.

In February the Institute hosted the vice-Council of the United States of America Mr. Andrew H. Hogenboom.

The coordinator organized the site visit of Dr. Cathy Ashmore who helped the coordinator to work out new strategy for the future development of the program.

The Institute staff responds effectively to the local market regarding courses needed in the region. Classes in investments were successful along with courses in banking.

A lot of local banks recognized the importance of the Institute's services. The Institute provides a variety of courses related to banking, e.g.: *Banking Law, Evaluating Individual Client Performance, Banking Accounting, Ratio Analysis*. Recently, the Institute has signed an agreement with Environmental Bank to work on the reconstruction of the bank as well as to perform several seminars for managers and employees of the Bank. These are beyond the scope of the present project however, Institute staff recognized this and planned for these courses in addition to those included in the project. The courses in banking prove to be an important source of income for future Institute's operations.

Next quarter the Institute will conduct seminars for employees of *POLFA* Rzeszów (drug factory) on writing a business plan and financial analysis.

5.0. Maintaining Task Force

In February, we held our task force meeting in Warsaw. It was attended by our coordinators from the Polish-American Enterprise Institutes in Białystok, Poznań and Rzeszów, the U.S. staff and members as listed in Appendix 5.0.

The purpose of the meetings was to present the further development of the Polish-American Institutes, to discuss the role of Advisory Committee during the third year of the Project implementation and the importance of networking and promoting small business development.

As the Solidarity Foundation started to prepare the III National Conference sponsored by the U.S.AID in May, we discussed a program for it and the issue of fund raising for continuation of this activity. Several members of our task force expressed the willingness to give the Forum their financial support, for example: Ministry of Industry, Cooperation Fund, Foundation for Local Democracy, Ministry of Labor and Social Policy as well as Regional Economic Development Foundation.

The next task force meeting will be in connection with the Entrepreneurship Forum in May in Gdynia where we plan to invite also satellite centers' coordinators.

6.0. Polish Scholars Visit U.S.

This task has been completed.

7.0. Develop Case Studies of Polish Entrepreneurs

Our three Institutes continued working on cases which will be published by the Solidarity Foundation. It is intended to be used as a learning tool to bridge the gap between academic analysis and the practical application of information. The Polish teachers exposed to the writing process found it very challenging for their professional careers. They learned how to use their knowledge and skills to identify problems and analyze alternatives. We believe that the case analysis will became a useful teaching/learning vehicle in addition to the traditional approach of teaching in Poland. The final version of all cases will be presented in the last report.

Solidarity Foundation was a great help for us in coordinating the case-writing responsibilities.

The OSU staff has reviewed the cases and provided each Institute with feedbacks.

The Poznań Enterprise Institute presented us new cases to be reviewed. The entrepreneurs serving as basis for the cases are as follows:

BIG Ltd.,

- established in 1992: hired 7 persons.

Type of activity: design, graphics and preparation of different types of printed materials forms, promotional materials and other minor printing services. The first problem which the company faced was related to the increase of competition in this field which required to expand the company's offer and to improve the quality of the company's products without increasing costs of the its operations. To overcome competition the owners of the company figured out that their chance is to join some kind of printing house. Such a common venture would give both parties certain advantages - lowering operating costs, developing the capability of meeting clients needs and flexibility in negotiating profit margin with clients. The owners of ***BIG Ltd.,*** were aware of some risks they might face but still the advantages were bigger that the risks for both partners.

Cooperative Bank

- hired 30 persons.

Type of activity: banking and financial services.

A banking system in Poland was reformed in the period of 1989-1992. The new situation led to the increase of banks independence and competition as well in the field of financial services.

The *Cooperative Banks'* operations were affected by growing inflation what limited loans offers. Another situation such as growing rate of the unemployment, the decrease in economic activities in that region had the impact of that Bank's activities as well.

Cooperative Bakery Company BAHIA

- established in 1953; hired 300 persons.

The end of Cooperative Union in 1989 gave the company (which was also production cooperative) independence in decision making about the future development strategies. At the same time, import of food products caused problems with selling of goods produced by this company. It was a new situation for the Polish producers at that time. Simultaneously, a competition among in-

country producers from the same branch took place. Some of them, for example *Wedel* or *Goplana* had more financial and organizational resources to utilize. Still, newly emerging private firms were more flexible in making decisions, did not have the burden of old production equipment and extensive employment. The company had to develop new strategy to survive in the competitive market.
In this case the students will learn about the kind of steps the company had to undertake in terms of human resource management, production improvement (wrapping), offer expansion in order to survive.

TAXPOLE Ltd.,

Established in 1992;
Type of activity: accounting services for people and variety of businesses.
This is a story about two students from Poznań Academy of Economics who were looking for financial support to be able to continue their study. After a while they decided to take over an old company *Jawa* and tailor its activities to meet the needs of the customers in that region. They started to be specialized in financial consulting services such as bookkeeping, tax advising, writing business plan which they offered to small and medium-sized companies.

Rzeszów Enterprise Institute prepared cases about the following small businesses:

Victoria company

The company manufactures ice cream as well as it developed its own distribution network in the South-East part of Poland; In this case the students will learn how incorrectly formulated leasing agreement may affect the future development of a small business.

Polcom company

The company developed very successfully two major business activities: ketchup production and computers' services. Three owners can no longer work together and the problem is how to divide the shares so that each gets a fair number.

Oneman company

The company manufactures wood furniture and parts thereof. The problem described in this case is how much credits they need to keep the business growing.

Białystok Enterprise Institute prepared cases about the following companies.

East Trade

a foreign trade company; imports variety of household supplies the countries of the former Soviet Union and Western Europe and distributes on the Polish market through local dealers. The company also export other goods, such as a coppery fixture. This case presents the process of reconstruction and modernization undertaken by the managers of the company in order to survive on the competitive market.

MADORIN Comp.

is an import-export company whose owners established two retail stores and a *Power club*. The company is managed by three engineers who decided to do this because of their very bad financial situation and lack of future opportunities in their profession. In this case, we learn about how unsteady economic situation in Poland affects small business operations.

Pro-Arte

a coffee-club; presents how three individuals learned how to became self-employed.

Biel-Sawa

a textile industry company; describes a development of the company hiring 250 employees. Its owner started the business from scratch as Polish banks did not offer any kind of loans for small businesses at that time.

8.0. Conduct Faculty Upgrading Workshops

The coordinators of each Institute continued to update their faculty's skills on a regular basis. We met with the faculty during our site visits this quarter.

This quarter, there was a skill up-grading workshop for the faculty specializing in teaching marketing in each Institute organized and conducted by the faculty from the Poznań Institute (January 13-15; total teaching hours - 192).

Besides upgrading teaching skills, the purpose of the workshop was to share experiences in teaching the marketing course and to discuss the usage of newly developed materials. We feel that this kind of meetings help the faculty from the different sites to set up a continuous improvement process.

The topics presented during the workshop included:

- Marketing Management in the Period of Economic Transformation (Dr. Henry Mruk)
- Basic Marketing Strategies (Dr. Bogdan Sojkin)
- Promotion: Methods, Forms and Effectiveness (Jacek Koll)
- Marketing and Non-Profit Organizations (Dr. Jerzy Kur)
- Banks Marketing
- Marketing and Small Business (Dr. Marek Piechecki and Sławomir Jezierski)
- Discussion on Models of Marketing Strategies while Economic Transformation (Dr. Wojciech Piotr)

The workshop attracted 13 teachers currently teaching marketing in our three Institutes. They were satisfied with the marketing material they received but would like to continue working with OSU staff to update them.

They all were pleased with the opportunity to deliver seminars through our satellite centers because it helped them to learn more about the local market needs.

Detailed participation list is found in Appendix 8.0.

During the workshop the teachers met Dr. John Turner to discuss their problems related to the methodology of teaching. In his opinion, the teachers appeared to be very current in their knowledge of Marketing and Economic concepts. They were aware of the gap between their knowledge of Marketing Theory and readiness of business owners and managers to accept and incorporate these concepts. According to this group of instructors, statements like "but that won't work in Poland" or "Poland is different" is a frequently offered defence and/or offense from business personnel regarding their limited application of marketing concepts.

Dr. J. Turner recommended the Institutes working with the faculty:

- to handle the pedagogical development of the instructors on an individual basis rather than through a workshop;
- to collect course evaluations on a regular basis;
- to communicate the results of these evaluations to each instructor; also to use the data from each instructor's course as a basis for providing pedagogical assistance and coaching;
- to provide subcontractors with a tentative topical outlines to help them the development of instructional material.

Dr. J. Turner also prepared a draft how to organize and conduct a seminar for instructors/teacher, which may serve as a model for the Institutes.

9.0 Conduct Polish National Conference

During this quarter the Solidarity Foundation started to prepare the III National Entrepreneurship Forum, in Gdynia Hotel, May 15, 1994.

This year, the major theme of the Forum is Entrepreneurship and Regional Development. The Solidarity Foundation in cooperation with our three Institutes works on its content. We plan to present such topics as:

- methods for supporting small business development in a region,
- technology transfer to small businesses in Polish reality,
- negotiations skills as a factor for small business success,
- regional research - evaluation of SME development based on sample regional data

Our American consultant, Donald Kopka Jr. will present the results of his research which he did with the assistance of our Institutes and their networks. The main purpose of his research was to examine the similarities and differences between Polish and American entrepreneurs and managers in terms of personality, environment perception and behavior.

SUMMARY

The third quarter of Year III found the three Institutes working on preparation and conducting new short courses. Each Institute ran several courses for local entrepreneurs as well as in their new satellite centers in addition to their other training activities they developed as part of each Institute. All courses and instruction fit the target audience. We feel that the institutes' staff have good understanding of the instructional needs of their communities. All Institutes (except Białystok) started to utilize the new Email capability via the Internet that helps them to communicate with OSU staff, establish new contacts as well as have access to variety of information resources existing all over the world.

FINANCIAL REPORT

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

The **CETE** budget to date is as follows:

Budget:		$ 2,937,897
Year I	$ 1,299,933	
Year II	977,198	
Year III	660,766	
Expenses:		$ 2,912,808
Year I:	$ 1,460,242	
First Quarter$	356,040	
Second Quarter	351,314	
Third Quarter	354,155	
Fourth Quarter	398,733	
Year II:	$ 812,835	
First Quarter	$ 254,489	
Second Quarter	292,966	
Third Quarter	167,264	
Fourth Quarter	98,116	
Year III:	$ 476,627	
First Quarter	$ 290,758	
Second Quarter	$ 185,869	
Third Quarter	$ 163,104	
Balance:		$ 25,089

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

Income:		$977,000
Year I	$ 376,000	
Year II	$ 282,000	
Year III	$ 319,000	
Expenses:		$ 791,261
Year I:	$ 365,080	
First Quarter	$ 30,513	
Second Quarter	$ 68,860	
Third Quarter	$ 155,171	
Fourth Quarter	$ 110,456	
Year II:	$ 282,000	
First Quarter	$ 57,140	
Second Quarter	$ 65,122	
Third Quarter	$ 56,818	
Fourth Quarter	$ 102,920	
Year III:	$ 144,261	
First Quarter	$ 72,959	
Second Quarter	$ 71,302	
Third Quarter	$ 71,150	
Balance:		$ 114,589

ENTREPRENEURSHIP INSTITUTES IN POLAND
Eleventh Quarterly Report, January - March, 1994

ACTIVITIES OF THE OSU FACULTY AND CONSULTANTS

- Weekly phone calls to the Solidarity Foundation to discuss issues related to the project implementation
- Provide technical assistance to the three Polish-American Enterprise Institutes
- Assist in developing outlines for new seminars
- Participate in Task Force Meeting in Warsaw
- Meet with site coordinators to improve plans for carrying out activities scheduled during their visit at the OSU
- Meet with counterpart staff in Gdańsk
- Site visit - Poznań, Białystok, Rzeszów
- Meet with the U.S. AID Program Officer in Warsaw
- Process expense reports
- Write the report for the third quarter of Year III

ACTIVITIES OF SOLIDARITY FOUNDATION

COUNTERPART IN POLAND

- Coordinate work of three Institutes (phone calls every week to check the current activities being performed by the Institutes and their satellite centers)

- Manage subcontractors budget - every month through verifying preliminary budgets, checking financial reports and sending money to each Institute

- Provide information for quarterly report to the OSU

- Supervise work of Institutes concerning typing and copying of materials for new seminars

- Coordinate activities of Task Force meeting (supervising organization of the fourth meeting in Warsaw in Europejski Hotel, facilitating the meeting, discussing III Entrepreneurship Forum ideas)

- Organize and conduct the Coordinators Meeting in Warsaw

- Organize and participate in a meeting at U.S. AID Office in Warsaw for American consultants visiting Poland - Dr. John Turner and Prof. Talarzyk

- Supervise and assist in a trip of Dr. Cathy Ashmore to Poznań and Leszno (Poznań Satellite Center)

- Coordinate Case Study writing process

ACTIVITIES OF THREE POLISH-AMERICAN ENTERPRISE INSTITUTES

- Promote the program
- Conduct faculty upgrading seminars
- Supervise the faculty members
- Conduct courses in satellite sites
- Prepare outlines for new seminars and conduct new seminars
- Write cases
- Prepare new materials to improve the program
- Attend a Task Force meeting in Warsaw
- Participate in Coordinators meetings to share achievement gained during the quarter and to improve plans for year III
- Assist Dr. John Turner to improve the quality of the Institutes activities
- Assist Dr. Cathy Ashmore while site visits

APPENDIX

0.0

BEST AVAILABLE DOCUMENT

BACKGROUND

Stocks Are Heating Up As New Markets Gain a Following

By Glenn Whitney

THE FIRST FLUSHES of capitalism certainly haven't disappointed early-bird investors on some of Central Europe's stock exchanges.

In 1993, equity prices in Hungary, Poland and the Czech Republic all posted gains in local currency and dollar terms well above the 35% Western European average. But, while the increases often have been spectacular—Warsaw posted quadruple-digit returns—so has market volatility. Price swings of 25% in both directions within a week have been common on all the region's markets.

Demand has come largely from domestic investors keen to jump on the stock-ownership bandwagon, and much of that has come from those buying readily recognizable company names or those who make popular household products. In-depth research on many of Central Europe's companies is still rare.

Growing Interest

Nevertheless, financial newspapers are beginning to proliferate in the budding financial centers, and it's common to hear talk of comparative price/earnings ratios and book-value estimates in cafes surrounding the exchanges.

In addition, emerging-markets funds, principally those based in London and New York, have begun to invest in the region, with Warsaw and Budapest drawing particular interest. Though the funds typically risk no more than 2% of their cash in Central Europe, many managers say liquidity and trade-settlement procedures are quickly becoming sufficient to handle further investment.

"It takes a long time to build up a portfolio in Warsaw and Budapest," says Kenneth King, head of emerging markets at **Kleinwort Benson Group** PLC's Kleinwort Benson Investment Management Ltd. in London. "But things are improving steadily, and we're starting to feel more comfortable."

Other institutional investors are awaiting clear signs of economic recovery in Central Europe's key export markets, notably Germany and France. When the business mood turns brighter, experts predict relatively heavy flows of funds into the region's exchanges, particularly from Western European exchanges, which were unusually strong last year.

There will also be a broader variety of shares to choose from this year, as dozens of privatizations are completed. That will provide a welcome change for investors such as J. Mark Mobius, director of emerging-markets investment at St. Petersburg, Florida-based fund manager Templeton International.

"There are no screaming bargains to be found right now in Eastern Europe," he says. "The promise of the region has yet to come to full fruition, but we have every belief it will, especially considering the upcoming mass privatizations."

POLAND

The Warsaw Stock Exchange was the success story of 1993, with the overall market index, the WIG, finishing the year an astounding 1,099% higher in zloty terms and 875% higher in U.S. dollar terms. The gains dwarfed anything in Latin America or Asia, with Turkey the runner-up in the world sweepstakes, climbing 413% in Turkish lira terms and 200% in dollar terms.

While many analysts anticipate a "corrective decline" from Warsaw's current heady levels, the exchange continues to push higher and will likely produce handsome gains this year. The exchange currently lists 22 companies, having added **Efeckt** SA, **Mostostal Warsawa** SA, **Polifarb** SA, **Sokolow** SA, **Vistula** SA, and **WBK** SA last year.

Demand has grown so much that Exchange chief Wieslaw Rozlucki expects to move to five-day-a-week trading from the current three sessions, by the end of the first quarter.

Average price/earnings ratios on the exchange started the year at bargain-basement levels of two, but climbed to 33 over the ensuing 12 months.

The top performer last year was **Irena** SA, Poland's leading crystal and glass producer. From consistently low earnings throughout 1992, profits picked up in 1993, rising 410% in the first three quarters of the year.

Share prices soared, catapulted both by the improved profit performance and the March acquisition of 30% of Irena's non-listed equity by **Minex**, Poland's main glass and china exporter. From an opening price of 48,000 zlotys on Jan. 4, the stock soared a staggering 2,369% in zloty terms, far outpacing the market. (**See chart of the region's hottest stocks on page 26.**)

With its strong balance sheet and cash flow, supplemented by plans to increase exports in 1994, analysts expect continued robust performance this year.

HUNGARY

During the first half of 1993, Hungarian stocks turned in the worst results of all emerging markets other than India, declining 27.3% in forint terms and 16.5% in dollar terms. But by July, the market had picked up steam in a spillover effect from the boom in Poland, and it finished the year up a respectable 48% in local terms, 24% higher in dollar terms.

Analysts say the market is trading at attractive multiples of around 13 times earnings. Currently there are 27 stocks listed on the Budapest Stock Exchange, which is open every business day.

In many ways, Budapest offers the most mature market in the region. The health of individual companies and the quality of their management are being closely examined by brokers in Budapest and Vienna, which helps to explain why investor sentiment has been relatively less euphoric than in Prague and Warsaw. The shares of 18 of the exchange's listed companies ended the year lower, led by agricultural consulting group **Musiz** Rt. The group dropped 80% in local-currency terms and 134% in dollar terms.

December saw the market debut of **Globus Canning Industry** Rt. and **Domus Kereskedelmi** Rt., a furniture retailer. Domus is 51.1% owned by **Fotex**, one of the exchange's most high-profile companies. The two new shares posted modest gains in the last two weeks of the year.

Shares in **Novotrade** Rt., the bourse's top performer, began a nearly nonstop climb in September, gaining 672% by the end of the year. And analysts predict the upward trend will continue.

The sprawling group, whose businesses range from trading company Novotrading KFT to automobile concern Nissan Hungaria RT, is emerging from two years of restructuring following bankruptcy proceedings, during which time it has been able to pay down its debts.

And the company increased its capital 14%, to 534.3 million forints (about $5.3 million) from 467.5 million forints through a private share issue in December. Since Dec. 23, the stock has also been listed in the Freiverkehr, or free-trading, category of the Bavarian Stock Exchange.

CZECH REPUBLIC

The Prague Stock Exchange achieved emerging-market status last year, as a wave of privatized companies began to be traded either directly on the exchange or through the country's computerized matching network, called the RM System. The HN-Wood 30 Index ended the year up 146% in koruna terms and 137% in dollar terms.

The Prague exchange, which trades twice a week, now has five fully listed shares; banks **Zivnostenska** AS, **Komercni** AS, and **Ceska Sporitelna** AS, confectioner **Cokoladovny Praha** AS and construction group **IPS Praha** AS. The shares of about 1,000 other privatized companies are also traded, though they haven't yet been officially listed.

Prague's top performer last year was **Prazske pivovary** AS. The brewer's shares began trading regularly in September and by year-end had surged about 300%.

Much of the fuel behind the stock's rise came in November, when Britain's giant Bass Brewers, a **Bass** PLC unit, announced it had formed a joint venture with Prazske pivovary and planned to invest as much as $74 million in the Czech company over the next five years.

Other big performers in the last quarter were Ceska Sporitelna, the country's huge savings bank, posting a 242% jump, Vodra Stavby Praha, a Prague-based construction company, up 209%; and Cokoladovny Praha, with a 194% gain.

OTHER EXCHANGES

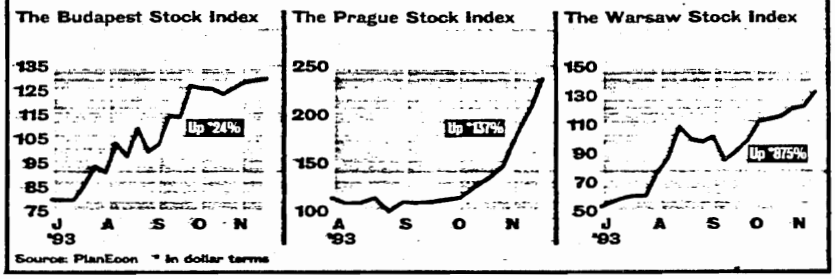
Stock exchanges in Slovenia, Slovakia and Russia were hampered by their governments' slow progress in privatization. By the end of 1993 these markets hadn't yet attracted much interest from Western fund managers.

The Bratislava Stock Exchange is now trading on a weekly basis, with six Slovak stocks listed.

In Russia, markets are still gestating. According to data from PlanEcon, a Washington D.C.-based research firm and consultancy, the average free-market price of privatization vouchers had more than quadrupled by year-end in U.S. dollar terms since April 1993. For the most part, investments in Russia, Slovenia, Slovakia and Romania generally are in the form of direct holdings either in companies or joint ventures.

Daniel Michaels in Warsaw, Neil King Jr. in Prague and Sheryl Lee in Budapest contributed to this article. CER

Central European Stock Market Indexes



Analysts Take the Challenge

HANDICAPPING the markets of Central Europe is no easy task, where stocks rise and fall as much as 25% within a single week and trade at price-earnings ratios ranging from 0.6 to near 100. The reborn securities exchanges of Budapest, Prague and Warsaw often don't even make it into emerging-market rankings.

But local investors, some of whom snatched returns of more than 1,000% last year, view Central Europe's markets with all the seriousness of Wall Street's most hidebound professionals. And several of those markets are increasingly attracting investment funds from a growing cadre of savvy global financiers.

Welcoming these markets into the halls of international finance, CEER begins 1994 by initiating a new regular feature: the Central European Investment-Selection Contest. Similar to contests in the U.S., Asian and European editions of The Wall Street Journal, CEER assembled a portfolio of investment advisers at the end of December to pick their favorite plays for the first half of this year, each competing for the highest return. The adviser whose pick yields the lowest return will drop out, to be replaced by a compatriot in June, for the next round. Winners advance.

No Monkey Business

Unlike the competitions in larger and more mature Western markets, our Central European analysts aren't competing against a portfolio chosen as if by a monkey. In the U.S. and Western European contests, the seasoned analysts' selections run against equities picked by tossing darts at a stock listing, in a test of market efficiency that stock guru Burton Malkiel proposed in his book "A Random Walk Down Wall Street." Mr. Malkiel suggested that because markets are so efficient, a blindfolded monkey stands the same chance of picking a winning portfolio as a highly paid professional.

In the far less efficient Eastern markets, the monkey wouldn't stand a chance so we've dropped him. Instead we'll be surveying primarily locally based analysts, who have their ears constantly to the ground. We also have picked one market watcher from outside the region, in London, where interest has grown in Central Europe's markets.

Given a limited number of stocks listed on each of the regional exchanges, the contest was opened to both debt and equity investments. In an affirmation of the expected continued strength of the stock markets throughout the region, all the contestants chose equities.

The analysts made their picks before the first of the year, at which time we started measuring their stock's performance. A

(Continued on page 26)

BUDAPEST

Kevin Brynie
K&H Securities

PICK: Pick Szeged — *"two rare advantages"*

LONDON

Peter Pejacsevich
John Govett Unit Management Ltd.

PICK: Fotex Rt. (Budapest exchange) — *innovative and relatively experienced management*

PRAGUE

Jindrich Weiss
Zivnostenska Banka

PICK: Ceskoslovenska Namorni Plavba, or Czechoslovak Ocean Shipping — *"deeply underpriced."*

WARSAW

Rafal Lis
Bank Gospodarki Zywnosciowej

PICK: Exbud — *a dark horse*

BEST AVAILABLE DOCUMENT

Eastern European Trade Winds Blow West

y Terence Roth

When worried German furniture makers complain of falling market share and growing ompetition from East Europe, they're lking about companies like Poland's **upskie Fabryki Mebli**.

"It's only recently that Western cusmers began noticing the price fference," says Jaroslav Dziuba, marting director at the privatization ndidate. With wages just above $200 month and lower costs for raw materals, Slupskie can undercut average estern prices by two-thirds.

The company's Western exports se to a 75% share of 1993 sales from % a year earlier. Part of the explanaon was a boost in capacity and a itch to pine from pressboard that nproved quality for display at big estern trade fairs. But the big differce was marketing, says Mr. Dziuba: Many firms in Eastern Europe don't now how to get into Western markets id then stay there."

That could be changing. Lured by ird-currency receipts, more and more astern firms are shipping westward. combining cost advantages with ewly acquired marketing and merandising skills, they are integrating to Western Europe's economy faster an some Western policy makers and dustry leaders privately might like as iey look to protect jobs at home. hese Eastern Europe success stories e slipping through the cracks of estern Europe's trade barriers, largely ft intact despite the advanced tradesociation agreements—known as Europe agreements"—that the Euroan Union has signed with Poland, ungary, the Czech Republic, Slovakia, ulgaria and Romania.

iggest Target

By 1992, the underlying westward ift was clear. Excluding former Soviet publics, 57% of Eastern Europe's sports, totaling $61.2 billion, went to e 24 industrial countries of the Organiation for Economic Cooperation and evelopment, up from a 50% share in 991, according to PlanEcon Inc., the Vashington, D.C.-based economic search group. Western Europe alone ccounted for 53% of those 1992 exports.

Germany is the biggest target by far, osorbing nearly a quarter of East Euroean exports in 1992, or almost as much s East Europe trades with itself. German business leaders have responded ith both growing concern and grudgng respect for Poland, for example, hich shows nearly 70% of its exports eading for West Europe. For many, oland, Hungary and the Czech Repub- are fast becoming Europe's verson of sia's dynamic "tiger economies."

"Hong Kong is now right at our oorstep," Michael Fuchs, head of Gerany's exporting industries association, old a conference of industry and govrnment leaders in Bonn recently.

Yet even the best performers show rowing pains that can hamper xporters. The region's annual inflation, anging from 21% in the Czech Republ- to 4,000% in Ukraine, can play havoc ith price and cost structures. Most astern European countries are expectd to damp inflation in coming years as ndustrial reforms advance. But in Rusa, where reform efforts are wavering, rice advantages are fading. A stable uble rate keeps terms of trade steady hile salaries and the costs of energy nd raw materials have jumped in dollar erms because of a 15% monthly inflation rate in 1993.

For others, cost advantages also can fall prey to pressure for higher wages to offset inflation, narrowing the gap between Eastern labor costs and those in the West, which still stand at 10 to 20 times higher. Many Eastern businesses also are beginning to return to their home regions or looking to the developing world after discovering that Western markets can be as tough as many of their own markets seem hopeless.

For instance, **Saturnus Autoprema** in Slovenia, a maker of automotive light fixtures, had been exporting 90% of its products to Western auto makers such as **Volkswagen** AG, the company's biggest single customer. Saturnus headlights for VW's Golf model were as much as 15% less than what other VW suppliers, such as **Robert Bosch** GmbH of Germany, charged. But the arrival of VW's hard-nosed purchasing chief, J. Ignacio Lopez de Arriortua, spelled trouble.

"He forced the others to reduce prices or lose their business to us, then he told us to reduce our prices or lose out to them," recalls Andrej Lazar, Saturnus's commercial director. As a result, VW has squeezed even Saturnus's margins to a sliver. Undiscouraged, the company streamlined and began knocking at other doors, including the French **PSA Citroen-Peugeot** auto group. "The Germans are so low in price, we can't only live from them," says Mr. Lazar.

Nor are East Europeans the only low-cost producers stalking Western markets, where new Asian rivals are undercutting even the Near East's own rock-bottom prices.

"In Western markets, we have to compete with Indian and Chinese companies who are coming on very strong with competitive prices even below ours," says Miklos Gyorgy, general manager of Hungary's **Chinoin Pharmaceutical Factory**. Helped by its big Western partners—the firm is 51%-held by Sanofi-Winthrop, a strategic alliance between France's **Sanofi** SA and the Sterling Drug Inc. unit of **Eastman Kodak** Co.—Chinoin gets a third of its annual $200 million in sales from exports to Western Europe, Japan and the U.S.

But Mr. Gyorgy recounts how increasingly aggressive drug producers in India depressed prices of certain basic antibiotics to below $80 a kilo from $600 a kilo in only 10 years. "And now, when I talk to the Indians, they say that the Chinese are underpricing them," Mr. Gyorgy says.

Corporate planning can be simpler for producers of many basic products. "Our strategy is staying alive," declares Miroslav Melota, co-owner of **Plzeske Papirny**, a paper-products company in the Czech industrial city of Pilsen formed around a mill privatized in September 1992.

Mr. Melota details a formula working for thousands of midsize companies in the region. The company sells directly to 50 customers in Western Europe, Africa and the Far East. Its only Eastern European customers are at home and in Hungary, where it takes only hard currency. Among its products, it makes 400 million envelopes a year for a price of about $5.80 per one thousand, compared to the average $8.20 per thousand charged by German producers. "So far," he says, "we have no problems."

Others have made the grade by diversifying. By expanding into high-growth services such as construction and telecommunications, for example, Poland's recently privatized **Elektrim** SA has become one of the darlings of Warsaw's soaring stock exchange.

Electrical machinery and power-plant equipment still account for two-thirds of Elektrim's exports, but its diversification will allow it to build new markets in Asia and both East and West Europe. A recent contract to supply electrical equipment to the Austrian electricity authority will run through the year 2010 and provide revenue of $60 million to $70 million a year. The company also plans to sell telecommunications equipment to its East European neighbors, all of whom are hoping to modernize their telephone networks.

Innovation was the passport to profits for Gabor Bojar, who started his **Budapest Graphisoft** software company in 1981 with $1,000 raised from pawning his wife's jewelry. His answer wasn't flashy labeling but new products and big Western partners. The trained physicist got the idea to develop software to help architects and designers better achieve design solutions by simulating three-dimensional models.

In 1987, Graphisoft came out with ArchCAD, a computer-aided design software package that was one step ahead of the competition and the first CAD capable of running on a personal computer. It was also cheaper than comparable Western brands.

Mr. Bojar knew he had to sell to the West to survive; so he made a deal with **Apple Computer** Inc. to jointly market ArchCAD and set up branches in Munich and San Francisco. Some 11,000 ArchCAD packages have been sold so far, generating sales in 1992 of $6.2 million, of which 70% are in West Europe, with 17% coming from North America and the rest from the Far East.

Mr. Bojar has new plans and even loftier dreams. Graphisoft is now adapting ArchCad for **Microsoft** Corp.'s Windows to keep pace with competitive CAD software markets. "My goal is sales of $50 million annually," he boasts. "We're the rising star of the industry."

Any look at East Europe's export economies offers a widely differing picture. For every flourishing exporter there are at least a dozen fallen giants, often reflecting how far free-market reforms have come in breaking up state industry and trade monopolies.

Most former Soviet republics are still reeling from the breakup of Comecon (Council for Mutual Economic Assistance) trading agreements, causing the collapse of procurement sources as well as markets. Many of their exporters are coping with economic chaos, political instability and even civil war. But some are thriving in the confusion.

In Uzbekistan's capital, Tashkent, the plush office/home of plastics and textile magnate Gregorii Leventul is protected by steel-reinforced doors and includes an elaborate underground escape route in case of "emergencies"—anything from criminal attack to a sudden shift in Central Asian politics.

Profiting from the country's cheap supply of cotton and labor, as well as his own international contacts and mangerial know-how, Mr. Leventul in 1987 founded an exporting empire that today encompasses 76 factories with some 120,000 employees. His company, **Leventul** Ltd., has an estimated $31 million in annual exports to Western Europe and the U.S. as well as 16 billion rubles ($12.8 million) to Russia and other former Soviet republics.

For now, his problems aren't politics but runaway inflation and the region's sluggish payments system. And like businessmen everywhere, Mr. Leventul has an ax to grind with the tax authorities. "The West has one tax, we have 18. It eats up our profits," he complains. But, judging from the multilingual aides working into the night crunching numbers and cutting deals with business partners in the U.S. and Europe, profits remain ample.

In Armenia, five years of bitter war with neighboring Azerbaijan hasn't hurt profits at Arman Martirossian's **Aragast** Corp., an import-export firm he runs with the help of two company-owned Ilyushin transport planes.

The trained mathematician founded Aragast five years ago as a computer software company using personnel from former Soviet military research centers concentrated in Armenia. Aragast today is a conglomerate—other interests include a commodities futures firm and a life-insurance firm—with about $3 million in annual sales, of which a third comes from exports of sophisticated computer software to Armenian communities in the U.S. as well as financial software for bank customers in the Middle East.

With the collapse of the Soviet Union, Mr. Martirossian set his mathematical mind to exploiting the turbulent dollar-ruble exchange rate. "Our real strength," he says, "is that we know the financial market very well."

For all the optimism expounded by Eastern Europe's export entrepreneurs, the region's exports were at least temporarily throttled by Western Europe's 1993 economic slump. But a look at individual export economies suggests that they can get back their earlier momentum as Western economies recover this year:

BULGARIA

Like neighboring Romania, Bulgaria has increased imports sharply to offset production declines at home. In the first half of 1993, Bulgaria's trade surplus in convertible currencies shrank to $55 million, compared with a year-earlier six-month average of $242 million, according to DB Research in Frankfurt.

Still, analysts say Bulgaria has been able to replace its former Soviet markets with new customers in Western Europe, where its exports doubled in 1992 to command a 30% share of total Bulgarian exports of $3.5 billion. In all, Western industrial countries accounted for 42% of Bulgarian exports in 1992, up from 26% a year earlier. Simultaneously, the former Soviet Union's share was halved to 25%.

CZECH REPUBLIC

Foreign sales soared last year, but largely because sales to newly independent Slovakia were calculated as exports beginning in 1993. For the year, Czech exporters racked up an estimated $8.5 billion in foreign sales, up from $7.9 billion in exports recorded for all of 1992, according to Creditanstalt in Vienna. Imports last year totaled an estimated $9.9 billion, up from $9.2 billion in all of 1992.

But Czech exports were already shifting westward in 1992, when shipments to the former Soviet Union dropped 50% and those to other East European countries fell by 26%. At the same time, the OECD share of Czech exports rose to 47% in 1992 from 37% a year earlier, including sharp rises in trade with Western Europe, the U.S. and Turkey, according to PlanEcon. Data also show that the Czech Republic's detachment from Slovakia continued in 1993, when Slovakia accounted for only 19% of Czech

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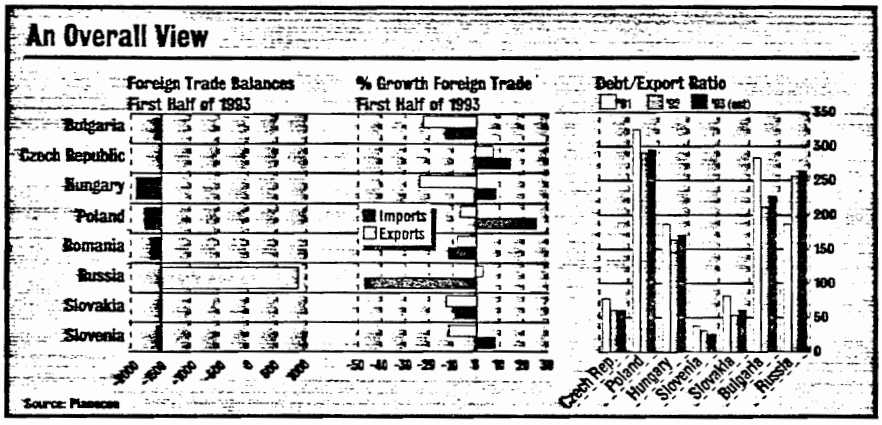

The Visegrad Four
Total merchandise exports/imports, in billions of dollars

	1990	1991	1992	1993*	1994*
Czech Republic	4.7/4.9	5.8/5.5	7.9/9.2	8.5/9.9	9.5/11.1
Hungary	6.5/6.3	9.3/9.1	10.0/10.1	8.4/10.7	8.8/11.3
Poland	10.9/8.6	12.8/12.7	14.0/13.5	13.3/14.8	13.5/14.9
Slovakia	1.3/1.9	2.5/3.3	3.4/3.6	3.1/3.3	3.6/3.6

Source: Creditanstalt, Vienna * estimates

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exports, compared with about a 31% share in pre-split 1992. Western Europe accounted for a 52% share of Czech exports in the first three quarters of 1993.

The trade restructuring has helped give the Czech Republic an OECD-projected $400 million surplus on its 1993 current account in a region riddled with deficits. The Czechs also boast the region's fastest-falling inflation rate and narrowest government budget deficit. Together with Prague's favorable trade position, the stabilization trend could help achieve Prague's goal of making the koruna the region's first fully convertible currency starting in 1995, a step that could speed its integration with Western markets.

HUNGARY

Hungary is right behind Poland in exporting to the industrialized West, which took a 70% share of Hungary's total exports of $10 billion in 1992. With the lion's share going to Western Europe, the OECD's share of Hungarian exports fell 20% in the first half of 1993 as recession gripped EU economies, leaving Budapest with a projected 1993 current-account deficit of $2 billion compared with the previous year's $300 million surplus.

In 1992, Germany accounted for $2.9 billion of Hungary's exports, followed by Austria at $1.1 billion and Italy at $1 billion. But exports to the former Soviet republics and Eastern Europe remained constant from 1991 at about 13% and 10%, respectively.

POLAND

Strong as Poland's export surge has been since 1989, its growing economy also has been attracting increasing import flows, saddling the country with an estimated $2.4 billion deficit in 1993. Economists say they expect further devaluations of the zloty, as well as pressure to impose safeguard measures that would block some imports.

Says Pawel Bozyk, director of the Institute of International Economic Relations at the Warsaw School of Economics: "This is a very serious problem, and we have to find ways to repair it quickly. If we don't, our whole economic reform will be at risk."

Many local and foreign businessmen are confident that Poland will narrow the gap. The country still enjoys the advantages of a big national market, a highly educated work force and low labor costs. Exports to Asia are growing, and hopes of recovery in Germany, Poland's biggest trading partner, will go a long way toward changing the picture, local businesspeople say.

PlanEcon analysts attributed the 13.7% decline in Polish exports to OECD countries in 1992 to a pronounced shift to the Third World.

Sizing Up the Region's Winners and Laggards.

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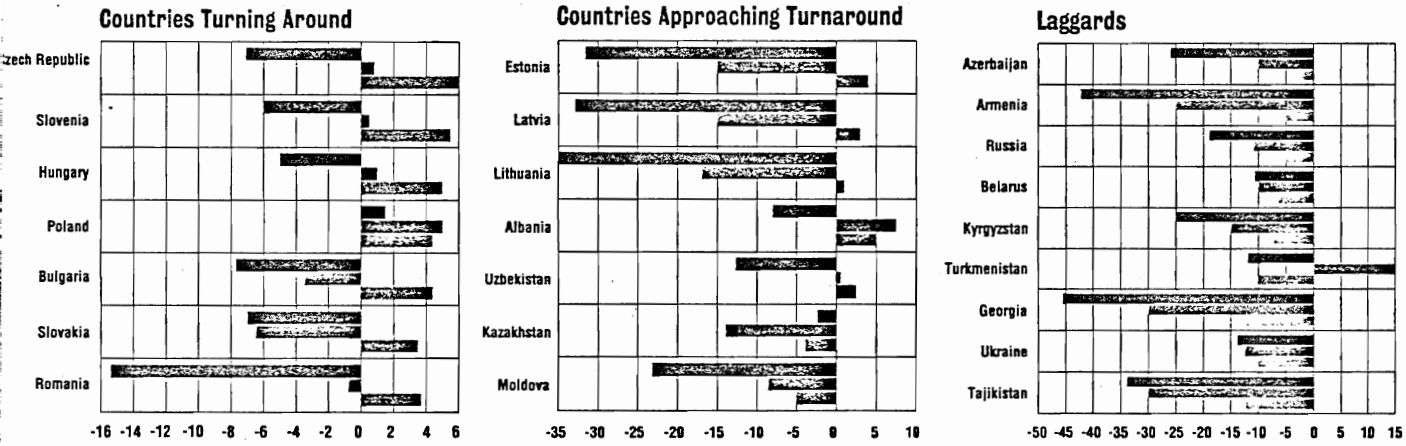
PlanEcon's Review and Outlook

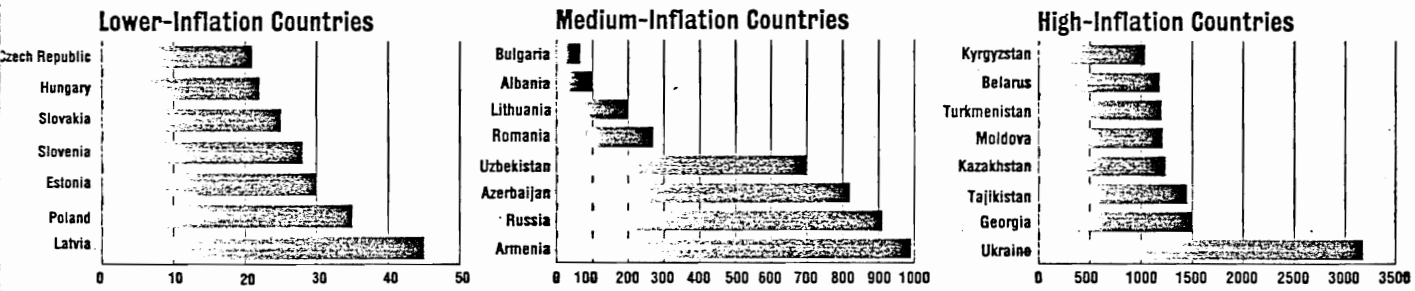
A Look at GDP

Real annual change in percent. ■ 1992 ■ 1993 ■ 1994 (estimates)



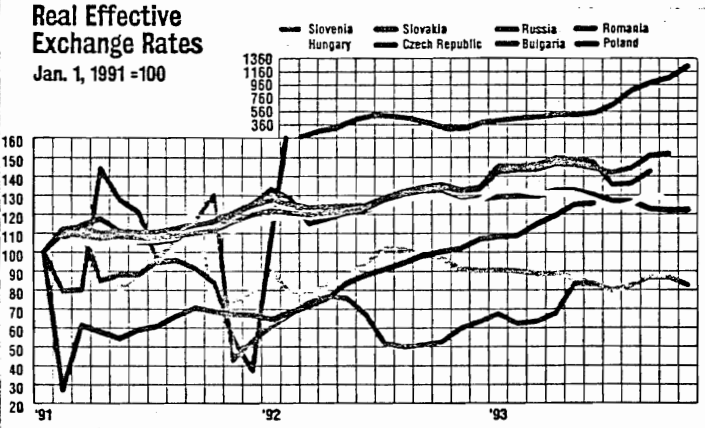
A Look at Inflation

Annual inflation in 1993 percent.



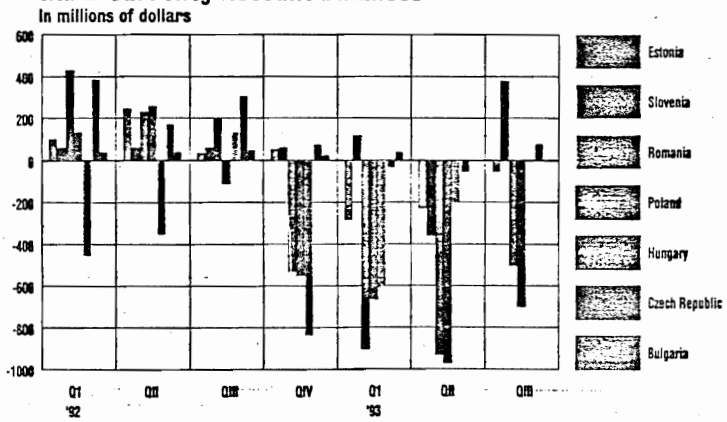
Real Effective Exchange Rates

Jan. 1, 1991 =100



Hard-Currency Account Balances

In millions of dollars



Quarterly Economic Review

Polish exports to developing countries rose 37% in 1992 to $1.5 billion to account for 11.3% of total exports.

ROMANIA

Faltering reforms and a faltering currency have dogged Romanian efforts to boost exports to the West. "Unlike other reforming economies, exports are only slowly emerging as a growth factor," the OECD said in an analysis of the Romanian economy last summer, when the organization projected a drop in exports this year from 1992's $4.3 billion.

Romania exported only $2 billion in goods and services to OECD countries in 1992, less than half of total exports and amounting to about a fifth of Hungary's OECD exports. While those exports stagnated, Romania boosted sales to Eastern Europe by 65% in 1992 and to the former Soviet Union by 20%, according to PlanEcon. In addition, Romania's Third-World exports rose 55% in 1992, for a 27% share of total exports.

SLOVAKIA

Analysts see Slovakian exports turning increasingly away from the Czech Republic toward Western Europe, as well as Russia and neighboring Ukraine. PlanEcon saw the trend well under way in early 1993, when the share of Slovakian exports to the Czech Republic fell to 36% in the first quarter from a 46% average in pre-split 1992.

At the same time, the share of exports to Western Europe rose to 39% from a 1992 average of 28%. The Slovakian government recently projected total exports in 1993 easing to $3 billion from $3.4 billion in 1992.

SLOVENIA

About half the size of Switzerland, the former Yugoslav republic of two million inhabitants has become one of the region's more potent exporters. More than half of Slovenia's 1992 gross domestic product of $12 billion derived from exports, translating into about $3,000 in annual per-capita exports, or roughly equal to Japan's export rate.

"We are a small country that has to live on its exports," says Josip Skoberne, vice president of Slovenia's Chamber of Commerce and Industry. Slovenia's traditional export market fell by as much as 40% with the breakup of the Soviet Union and the protracted Bosnian war. In 1992, Slovenia's $4.4 billion in exports to OECD countries represented a rise to 66% of total exports from 42% a year earlier, and was more than the combined OECD exports of Romania and Bulgaria, according to PlanEcon data.

Slovenia's exports to the West, predominantly industrial equipment and supplies, eased last year amid Western Europe's recession, possibly setting back Mr. Skoberne's prediction that Slovenia could double its exports in five years. DB Research in Frankfurt says total Slovenian exports eased to $4.5 billion in the first nine months of 1993, compared with a three-quarter average of $5 billion in 1992.

RUSSIA

In 1992, Russia began asking world market prices and hard-currency payments for its goods from traditional clients in the former East Bloc to help allay its debt crisis. The result refocused its trade on the West, but Russia's widening trade surplus came more from import reductions than export expansion.

In the first 11 months of 1993, exports to former East Bloc countries totaled $6.6 billion and imports $1.87 billion, compared with $28.8 billion in exports and $15.7 billion in imports with Western trading partners.

Raw materials are still Russia's major export, with machinery and other manufactured goods accounting for less than 10%.

The country's biggest export successes are still the state-run oil and natural-gas companies, which compose 60% of total exports and $12 billion to $15 billion in annual sales, making them the country's top foreign-currency earners. Russian crude-oil production is estimated to have fallen 15% last year because of delayed investment in new equipment.

But a bigger problem facing Russian exporters is the rising domestic costs after price controls were lifted a year ago, explains Ursula Bayreuther, a Russian analyst at DB Research. "Producers of everything from aluminum to furniture are having a harder time offering attractive prices in the West, where they used to be able to sell at dumping prices before," she says.

Yet some still are able to sell technological products at below-market prices, particularly to the developing world. One example is St. Petersburg's Leningrad Optical-Mechanical Organization, or LOMO, which is set to be partially privatized early this year. One of Russia's leading optical-technology companies, with its roots in defense production, LOMO is banking on Western profits from its full range of microscopes. "It's very difficult, but we're trying to reorient to the West, and a lot of good clients are interested," says LOMO's chief economist, Vladimir Didyk. LOMO in 1993 exported about $3 million worth of products to the West, a fourfold increase over the previous year, says Mr. Didyk. This year the company expects to record $10 million to $15 million in exports.

"Our products are getting more competitive," says Mr. Didyk. "But there still are certain Russian weaknesses: We can't do acceptable designing, we don't pack very nicely." Some of LOMO's Western buyers ask them to send the goods in crates for packaging in the West. "In our culture, the idea of working for the sake of the consumer just didn't exist," Mr. Didyk notes.

UKRAINE

Ukraine still exports primarily raw materials, and those companies that do export are primarily state-owned and hampered by unconverted central planners.

Like those of other former Soviet republics, Ukrainian companies didn't know who their customers or suppliers were after the breakup of the Soviet Union, because all orders were made in Moscow. For the better part of the past two years, companies have been trying to re-establish severed ties to resume exporting.

Exports also have been hit hard by a government policy that says all companies must sell 50% of their hard currency to the government at a fixed rate of 12,600 karbovanets. That has prompted a number of companies to keep their money abroad in foreign accounts or cut back on exports completely.

But some exporters are getting their goods through the tangle. The NORD refrigerator company has emerged as one of Ukraine's few exporting stars since its privatization in May 1993 as a joint-stock company. It began shipping refrigerators and freezers to the West three years ago and now lists buyers in Italy, Belgium, Cyprus, Asia and Africa. But it first had to pick up the pieces.

Spokeswoman Vita Shuchenkorge says that the breakup of the Soviet Union left NORD's suppliers scattered all over the former empire. "We had to redefine who our partners were," she says.

BALTICS

Before independence from the Soviet Union in 1991, the three Baltic states were highly integrated into the Soviet economic system. Trade with the West was almost nonexistent, averaging no more than 10% for any of the three countries. But the collapse of their traditional markets to the East has forced the states to take dramatic steps. While Russia is still Lithuania's largest trading partner, Estonia now trades more with Finland, and Latvia more with Germany.

"We are reorienting our trade toward the West," says Olgerts Pavlovskis, state minister for foreign trade in Latvia. "Our plan is to have a Western currency, Western know-how and products that sell in the West."

That goal still lies somewhere over the horizon, however. While Estonia is making headway, Latvia and Lithuania are still highly protected markets, and steps toward privatizing state-owned property have come in fits and starts. The lack of good transport links among the Baltic states also holds the three countries back.

As a financial, communications and transportation bridge between East and West, the Baltics have an interest in trying to preserve close ties to Russia and former Soviet states. But the fierce independence sentiments in all three countries have slowed efforts to cooperate among themselves, meaning that none of them is out of the Soviet woods yet.

Mark M. Nelson in Berlin, Elisabeth Rubinfien in Moscow, Natalia A. Feduschak in Kiev, Ernest Beck in Budapest and James M. Dorsey in Istanbul contributed to this article. CEE

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APPENDIX 1.0

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COORDINATE PROGRAM

POLISH-AMERICAN ENTERPRISE INSTITUTES
CALENDAR OF ACTIVITIES

JULY 1993

- Quarterly Reports due - beginning of the month

AUGUST

- Institutes establish three satellite centers each

SEPTEMBER

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

OCTOBER

- Institutes prepare outline of new seminar materials to share
- SBA Meeting (12)
- Quarterly Reports due - beginning of the month
- Survey of Faculty Completed (Jan. 15, 94)
- Export/Import Course Faculty Upgrade Seminar - Rzeszów (14-16)

NOVEMBER

- E-mail Number (1)
- Management Course Faculty Upgrade Seminar - Rzeszów (7-9)
- Finance Course Faculty Upgrade Seminar - Bialystok (18-22)
- Survey of Business Owners completed (Feb. 15, 94)

DECEMBER

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

POLISH-AMERICAN ENTERPRISE INSTITUTES
CALENDAR OF ACTIVITIES

JANUARY, 1994

- Marketing Course Faculty Upgrade Seminar - Poznań (14-15)
- Quarterly Reports Due - beginning of month
- Dr. John Turner arrives in Poland - Poznań (8-21); Białystok (Feb. 24-4)

FEBRUARY

- Task Force Meeting (Feb. 18)
- Coordinators Meeting (Feb. 19)
- Dr. John Turner works with Institutes - Rzeszów (7-8), Poznań (21-4),
- New Seminars Materials completed
- Seminar on *Selling* (13-14; Dr. J.Turner)
- Seminar on *Successful Retailing* (14-25; Prof. Wayne Talarzyk, OSU)

MARCH

- FORUM Program Proposals (due 1)
- John Turner works with Institutes - Białystok (7-18), Rzeszów (21-1 April)
- Seminar on *Human Resource Management* (15-16, Białystok)

APRIL

- Quarterly Reports Due - Beginning of Month
- New Seminar Workshops for Faculty scheduled in 3 Institutes (other 3 topics)
- Meeting for planning final FORUM details
- Seminar on *Market Research* (7-15)
- Seminar on *Team Building* (18-29; Dr. Sheila Davis)

MAY

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

JUNE

- Seminar on *Negotiations* (6-17; Prof. Roy Lewicki, OSU)
- New Seminars Taught
- Final Report Due - end of month
- Case Book published

ECONOMIC FOUNDATION
NSZZ SOLIDARNOŚĆ

80-855 GDAŃSK
ul. Wały Piastowskie 24
POLAND

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

ACTIVITY REPORT
January - March 1994

1. Coordinating work of Entrepreneurship Institutes
   - phone calls every week to answer questions and check current activities of three centers;
   - solving problems connected with current operation of Entrepreneurship Institutes;
   - solving problems connected with current operation of Entrepreneurship Institutes.

2. Managing subcontractors budget - every month:
   - verifying preliminary budget;
   - checking financial reports sent by each Institute;
   - sending money to each center with a letter stating allocation of the money.

3. Supervising work of Institutes concerning typing and copying of materials for new seminars that is Human Resource Management, Team Building, Negotiations, Retail Management, Selling, Market Research.

4. Coordinating activities of Task Force:
   - supervising organization of the fourth meeting in Warsaw in Europejski Hotel;
   - facilitating the meeting;
   - discussing III Entrepreneurship Forum ideas.

5. Organizing Coordinators meeting in Warsaw

6. Organizing and participating in a meeting at U.S. AID office in Warsaw for American consultants visiting Poland - Dr. John Turner and Prof. Wayne Talarzyk.

7. Supervising and assisting in a trip of Dr Cathy Ashmore to Poznań and Leszno (Poznań Institute satellite).

8. Coordinating Case Studies writing process.

AGENDA
Białystok Entrepreneurship Institute
Feb. 20-23, 1994

Guests: C.Ashmore, Prof. Talarzyk

Hosts: A.Jurgilewicz, B.Plawgo

Feb.20th
Sunday

3.28 ..... Arrival

3.45 pm ..... Check in /"Cristal" Hotel/

Feb.21st
Monday

10.30 am ..... "Retailing" seminar /Prof. Talarzyk/-Interpreter:M.Fiedorczy

2 pm ..... Lunch /"Avanti" Restaurant/

3.30 ..... Visiting School and Institute
Visiting Białystok City-Escort:M.Fiedorczyk

Feb.22nd
Tuesday

10 am ..... "Retailing" seminar /Instructor from Poznań/

2 pm ..... Lunch /"Premiera" Restaurant/

3.30 ..... Meeting with coordinators

Feb.23rd
Wednesday

10 am ..... Check out and Departure

Phones:

"Cristal" Hotel - 25061

Andrzej Jurgilewicz /home/ - 633132

Institute- 23621 ex.39 /new office, Krakowska 5 Str., room 602/
- 21945 /old office, Wiejska 45E Str., room 20/

Białystok Business School - 26682 /Krakowska 9 Str./

AGENDA
COORDINATORS MEETING
March 19 1994

- Summary of Institutes activities - accomplishments
- Status of Faculty:
  - meetings
  - evaluations
- Faculty Seminars:
  - Marketing
  - Entrepreneurship
- Satellites
- Status of New Courses:
  - Rzeszów - Team Building
  - Poznań - Market Research
  - Białystok - Negotiations
- Budget Reports
- Quarterly Report Format
- Strategic Plan/ Mission Statement etc.
- Survey of Faculty
- Survey of Business Owners
- Plans for ENTREPRENEURSHIP FORUM:
  - program
  - participants
  - sponsors
  - schedules
- Update the Calendar of Activities
- World Bank Project
- Status of Cases - writing
- Plans for Feb. 28
- Status of E-Mail
- Final Strategic Plans
- Plans for next year
- Close out procedures

POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI
POLISH-AMERICAN SMALL BUSINESS INSTITUTE
35-030 Rzeszów, ul.Zygmuntowska 2a, tel./fax;(0 17)328-58
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

MESSAGE

TO: CATHY ASHMORE
FROM: KRZYSZTOF KASZUBA I ADAM GÓRAL
DATE: 94.02.21

WELCOME TO RZESZÓW

AGENDA

Thursday 24.02.94

8.30 - 10.15	-	trip to Przemyśl
10.30 - 12.00	-	Retailing - lecture of prof. Wayne Talarzyk
12.00 - 12.30	-	break for coffe
12.30 - 13.30	-	Retailing - lecture of prof. Talarzyk
13.30 - 14.15	-	Discussion
14.15 - 16.00	-	trip to Rzeszów
16.00 - 19.00	-	free time
19.00	-	dinner

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Friday 25.02.94

10.00 - 13.00	-	Discussion about program of retailing seminar - participants: prof. Wayne Talarzyk and faculty from Rzeszów
13.00 - 15.00	-	lunch
16.00 - 18.00	-	Retailing - lecture of prof. Wayne Talarzyk for entrepreneurs
18.30 - 21.00	-	Meeting with faculty and members of Association of Entrepreneurs

Schedule for the 1st March 1994

Visit to The PAI's affiliation Leszno

9.00. - Departure from the Poznań Hotel to Leszno

11.00. - Visiting Institute's affiliation in Leszno

- meeting with teachers of the Institute
- participation in a class of the businessmen's training within the Finance Module - topic : "Businesses in the situation of changing tax system in the cotext of current legal and economical regulations"

12.00. - Meeting with teachers of choosen schools in Leszno - topic : "The school participation in shaping of the future manager mentality, based on the example of American School of creation of the succesfull people"

13.00. - Press conference

14.00. - Meeting with the President of Leszno city. Discussion on questions on development and promotion in the context of existing expectations and posibilities

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Program pobytu dr Johna Turnera w Poznaniu w dniach 8.I.94–21.I.94

Termin	Program
8.I.1994	Przyjazd do Poznania Zakwaterowanie w Hotelu Rzymskim, Al.Marcinkowskiego 22
9.I.1994	Zwiedzanie miasta Poznania.
10.I.1994	Wizyta w Polsko–Amerykańskim Instytucie Przedsiębiorczości. Zapoznanie gościa z działalnością Instytutu. Zwiedzanie Akademii Ekonomicznej.
11.I.1994	Wizyta w Uniwersytecie A. Mickiewicza w Poznaniu. Biblioteka UAM. Spotkanie z władzami Wydziału Zarządzania. Seminarium za studentami, kierunek pedagogika i nauczanie.
12.I.1994	Robocze spotkanie z wykładowcami Polsko–Amerykańskiego Instytutu Przedsiębiorczości . Udział w seminarium ze studentami Akademii Ekonomicznej.
13.I.1994	Zwiedzanie okolic Poznania.
14.I.1994	Udział w seminarium z modułu "Marketing" organizowanym przez Polsko–Amerykański Instytut Przedsiębiorczości w Poznaniu.
15.I.1994	Udział w seminarium z modułu "Marketing"
16.I.1994	Dzień wolny
17.I.1994	Robocze spotkanie w Polsko–Amerkańskim Instytucie Przedsiębiorczości w Poznaniu. Praca nad materiałami szkolnymi Instytutu.
18.I.1994	Wizyta w filii Polsko–Amerykańsiego Instytutu Przedsiębiorczości w Lesznie. Seminarium ze studentami i pracownikami prywatnej Wyższej Szkoły Marketingu i Zarządzania.
19.I.1994	Robocze spotkanie w Polsko–Amerykańskim Instytucie

20.I.1994	Robocze spotkanie w Polsko–Amerykańskim Instytucie Przedsiębiorczości c.d.
21.I.1994	Zakończenie I etapu wizyty.
	Wyjazd z Poznania.

Dyrektor Instytutu
dr Zdzisław Krajewski

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The plan of John Turner visit in Białystok

The first stay in Białystok

22 January - arrive in Białystok
- visit in city
24 January - participation in a tax course for entrepreneurs
- visitation at School and Institute
26,27 January - participation in English Classes in Businesss College
28 January - participation in solemn dinner for entrepreneurs at the end of the course. Handing students the certificates
31 January - working out together with dr J. Paszkowski the frames of the futher seminar on topic " Human Resource Managment"
1 February - checking Email
2 February - visit in " Everest "firm. Diacussion with the Managing Director about distribution chanells
3 February - working on the contents of the seminar " Human Resource Managment "
4 February - checking Email
5 February - arrive to Rzeszów

The second stay in Białystok

12 March - arrive in Białystok
13 March - participation in lecture on topic "Strategic Plan "organized for the students of the One Year Managment Course. Lunch and discussion with students and prof. Jeżak who condudted lecture
15,16 March - working on final version of " Human Resource " Managment " seminar. Six hours seminar for staff conducted by prof. Pukniel and prof. Turner. As a result working out programme and contents of the futhere seminar that is going to be oranized by our faculties for students .The main and the most important advantage coming from this seminar is self- improvement staff
17 March - participation in English Classes in Business School
- checking Email,training one person how to use Email
18 March - arrive to Rzeszów

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POLSKO-AMERYKAŃSKI INSTYTUT
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SCHEDULE FOR JOHN TURNER VISIT

RZESZÓW March 21 - 31

21 Monday

Arrival to Rzeszów by train at 20.40p.m.

22 Tuesday

Working with Polish coordinator Krzysztof Kaszuba on the final version of the content of the selling seminar

23 Wednesday

Working with Polish coordinator Krzysztof Kaszuba on the final version of the content of the selling seminar.
At 11.30a.m. - trip to Krosno, satelite - participating in final classes course for entrepreneurs and unemployee.

24 Thursday

Working with Polish coordinator K.Kaszuba and A.Góral on e-mail.

25 Friday

Meeting with dean of Economic Department Maria Curie-Skłodowska University branch in Rzeszów.
Working with Polish coordinators K.Kaszuba and A.Góral on

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26 Saturday

Free day

27 Sunday

Trip to Łańcut and Leżajsk Church.

28 Monday

Working with Rzeszów faculty and coordinators on development selling strategy for Rzeszów Institute.

29 Tuesday

Working with Rzeszów faculty and coordinators on development materials for courses offered by Rzeszów Institute

30 Wednesday

Classes for student from Economic Department Maria Curie Skłodowska University.

31 Thursday

A trip to Warsaw by train.

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Final Report of Consultant

John E. Turner, Ed.D.

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POLISH-AMERICAN ENTERPRISE INSTITUTE
[Final Report (16 May 1994)]
John E. Turner Ed.D., Consultant

This report is being submitted at the conclusion of a three-month, on-site consulting assignment to the Polish-American Enterprise Institutes located in Poznan, Bialystok, and Rzeszow, Poland. The consultancy was scheduled for January-March of the third and final year of the project.

The project is funded through The Ohio-State University Center for Education and Training for Employment (CETE) by the office of United States Aid For International Development (USAID) in cooperation with the Solidarity Union of Poland (SOLIDARNOSC). The primary tasks assigned to this consultant were:

- to determine feasibility of establishing **Email** capability <u>via</u> the Internet for each of the three institute locations

- to assist with **instructional material** development for courses in Human Resource Management (Bialystok), and Salesmanship (Rzeszow)

- to observe **pedagogical skills** of institute instructors and make recommendations for programmatic changes to provide assistance in the development of appropriate teaching skills as needed.

In addition, it was requested that this consultant observe and make suggestions regarding overall operations at each of the three Institute sites.

The following report is organized by location (Poznan, Bialystok, and Rzeszow). Observations are made for each of the three assigned topics as observed during the first two week period followed by observations made in the same manner during the second two week period for each location. Overall observations and recommendations are provided in summation for each location. A list of miscellaneous activities completed at each location is also included. A final summative statement is provided at the end of the report regarding overall project operation.

POZNAN

(FIRST OBSERVATION, JANUARY 8-21, 1994)

EMAIL CONNECTIVITY:

After conversing with the Institute Director, I was informed that he would meet with the University Rector to inquire regarding the feasibility of connecting the Institute to the University's Internet Node. Following this meeting it was explained that plans by the University included having the entire building [in which the Institute is housed] connected sometime during the late spring (May-June) of 1994. (Currently, the building housing the University computer facilities and the existing Internet connection is in a separate building, a ten minute walk from the building housing the Institute.) The Director also informed me that if the building is hardwired to the mainframe the Institute would be able to connect for a fee of $2,000 [this fee is required for non-university organizations wishing to connect to the Internet via the university node].

During my second two weeks in Poznan, I planned to inquire about the possibility of sending Email [using the existing University Internet connection] in order to achieve minimum connectivity with the CETE project office in Ohio. This could be achieved at no cost by having one of the Institute's staff, who is also a member of the University faculty, apply for the account. As a minimum, this would allow for a test run of Email capabilities.

A more permanent alternative could be achieved for this location by leasing access and a number directly through NASK. The Polish Director for NASK is Dr. Thomaz Hofmokl, Warsaw (48/22) 268000. The technical director for NASK is Andrzej Zieukiewicz, at that same number. An estimate of the cost of this connection is $50-100 per month. There is also a one-time startup fee of approximately $75.00.

INSTRUCTIONAL MATERIALS: (Note: I was not assigned responsibility for a specific unit of instruction at this location; however, I was requested to observe the overall progress of instructional material development. The Poznan Institute is responsible for the development of instructional units in Marketing Research and Retailing. Other consultants are assigned to assist with these units.)

During the first two weeks, instructional materials were not made available to me for analysis. Review of these materials had been identified as one of my interests during my initial planning session with the Institute Director. A mention was made of these

materials at one point; however, no specific action was taken.

In order for me to respond, as requested, regarding the overall progress of instructional materials development at this location, I will again request access to sample course packages during my second observation. This will require the assistance of an interpreter.

PEDAGOGICAL SKILLS OF INSTITUTE INSTRUCTORS:

This priority received the most attention during my initial two weeks in Poznan. Effective instruction appears to be a concern of the Institute Director as well as the second Coordinator. Both were very helpful and cooperative in discussions with me regarding pedagogical development of instructional staff. A primary concern was expressed regarding University instructors being able to provide practical, business related application of theoretical concepts.

Although not able to observe an Institute class in process, I was able to meet and converse with several of the Institute's regular instructors. This was possible during the two day seminar for coordinators and instructors from Poznan, Bialystok, and Rzeszow that met in Poznan on Friday and Saturday (January, 14-15).

It seems that the instructors utilized at the Poznan location and their three branch Institutes are selected primarily from University faculty. These instructors appear to be very current in their knowledge of Marketing and Economic concepts. They openly expressed, however, a frustration with the gap between their knowledge of Marketing Theory and readiness of business owners and managers to accept and incorporate these concepts. According to this group of instructors the statement "but that won't work in Poland," or "Poland is different," is a frequently offered defense and/or offense from business personnel regarding their limited application of marketing concepts.

Many of these instructors have direct involvement in business (sometimes their own), in addition to their position with the University. I had the opportunity to speak with three of these individuals. One represented non-profit organizations, one the service industry, and the third, manufacturing and distribution. These individuals varied in their theoretical understanding of Marketing and in their attitudes toward incorporating marketing concepts in real business activities. Two were enthusiastic about their success in applying marketing concepts to real-life businesses. They had excellent examples that illustrated connection between theory and practice. The third seemed somewhat discouraged in that the limitations of everyday business finance had prohibited him from applying what

he thought to be marketing concepts in daily business transactions. After a number of questions I was satisfied that he is using a number of marketing concepts; however, I believe the difficulty is in his recognition of these activities as marketing related.

A tentative recommendation was made by this consultant for a 1 and 1/2 day workshop to focus on pedagogical skills of Institute instructors. A copy of the proposed outline, as submitted to the Institute Director, is attached to this report (attachment A). If accepted by the Director, the workshop would take place during my second two weeks stay in Poznan.

(SECOND OBSERVATION, FEBRUARY 21-MARCH 10, 1994)

[Note: time extended by four days at the request of Institute Director in Poznan and with permission of Institute Director in Bialystok (see attachment B)]

EMAIL CONNECTIVITY:

The second coordinator for this Institute location, Lukasz Pawelczak, is also a faculty member on the University staff. This allows Mr. Pawelczak to apply for Internet access via the existing University node. An application was made and approved. Mr. Pawelczak was then able to exchange Email messages with a CETE staff member (Elzbieta Jacowicz) at the Ohio-State University Center. This current arrangement requires Mr. Pawelczak to travel to a separate building (ten minute walk) in order to access the Email terminal.

INSTRUCTIONAL MATERIALS:

As noted earlier, I was not assigned specific responsibility for instructional material development at this location. However, during this second visit, the Institute Director and the Assistant Director requested my assistance with several aspects of instructional material development.

Mr. Pawelczak (the assistant Director) had recently been employed by the Poznan Institute (seven months) and had not been available to attend earlier training sessions conducted at the Center for Education and Training For Employment (CETE) in Ohio. These training sessions had included training on instructional material development. Since a large part of the responsibility for the final development of the two instructional units had been assigned to Mr. Pawelczak, it was important to spend time with him during this second observation, assisting him with skills needed to write instructional materials as specified by the project. I also met with instructors responsible for the writing

of each unit, the Institute Director, and Mr. Pawelczak, separately and in various combinations.

Although much of the content for each unit is in place, a lot remains to be done regarding format and supplementary teacher materials. Mr. Pawelczak understands what is needed and will continue to work with the instructional writers to achieve the format specified for project materials.

PEDAGOGICAL SKILLS OF INSTITUTE INSTRUCTORS:

During the time between by first and second observation in Poznan, I was in contact with the Institute Director on several occasions regarding my preliminary recommendation for a 1 and 1/2 day workshop for Institute instructors. After my observations in Bialystok and Rzeszow and additional communications with the Poznan Director, I concluded that it would be better to handle pedagogical development of the instructors on an individual basis rather than through a workshop. Existing instructors are experienced university faculty, some very effective, and a general developmental workshop could cause more harm than good.

In lieu of the workshop, I recommended that the instructional evaluation forms provided through the CETE staff in Ohio be used to further advantage. Although these forms are normally used to obtain feedback for inclusion in project reports, additional benefit could be derived from the information available through the evaluation process. After conversations with the Institute director and coordinator, it was agreed that information from these evaluations should be used to provide direct assistance to instructional staff. This was to be done in a non-threatening manner and for the purpose of helping the instructors provide the best possible instructional approach for the targeted trainees.

OVERALL OBSERVATIONS AND RECOMMENDATIONS REGARDING THE POZNAN INSTITUTE LOCATION:

OBSERVATIONS:

Overall, the Poznan Institute has been very successful. However, at times it has been difficult to achieve agreement between project staff and Institute staff regarding goals, objectives, and outcomes for this Institute location. The CETE Project Director and the current Director and Assistant Director for the Poznan Institute, are working diligently to bring about congruence of objectives and outcomes. The following observations are offered in the spirit of helping to understand the market environment for the Enterprise Institute in Poznan.

1- At the beginning of the project, a plan was established

for the development and delivery of instructional materials and classes for entrepreneurs and small business personnel in Poland. A corner-stone of this plan consisted of a basic marketing curriculum consisting of six individual introductory classes. These classes were designed for presentation to Polish business people, operating or hoping to operate (and their employees) small to medium size businesses in the rapidly emerging market economy in Poland. An assumption was made that these basic materials would be appropriate in each of the three locations, Poznan, Bialystok, and Rzeszow. The proposed materials seemed to have hit the target in Bialystok and Rzeszow, but according to Institute personnel in Poznan, they were not as appropriate in that location. This was due to two separate aspects of the environment in Poznan.

First, according to the Institute staff in Poznan, business personnel in the immediate area of Poznan possess a fairly high level of business knowledge and sophistication. Therefore, the basic course was not an exact fit for market needs. Second, and again according to Poznan institute staff both present and former, there were and are, numerous institutions providing similar courses in the region.

After spending approximately five weeks in this location and speaking with several instructors, the institute staff both present and past, several business owners and managers, and with university business faculty not directly connected with the Institute, I feel there is considerable merit to this opinion. However, I remain optimistic that all project objectives will be accomplished. The answer lies, to a great extent, in the satellite locations. (Please see recommendation number 3 regarding the satellite locations in the Poznan area.)

2- The second observation involves the internal operations of the Poznan Institute. The director feels that his situation and the uniqueness of his market is not always understood by the CETE project staff. I believe additional communications between Poznan Institute staff and CETE staff could help eliminate any misunderstanding. These additional communications should not be limited to the reporting of enrollment numbers, etc., but, should also include descriptive statements providing rationale for variations between the basic project plan and Institute activities.

3- Development of satellite locations in the Poznan area is a strong positive aspect for this Institute location. I personally observed activities in two of the four locations. Satellite managers in these two locations appear strong and directioned. One satellite, Leszno, leads the others in classes, enrollment, and completions. In my opinion, target markets in the satellite locations more closely match those needed for the basic curriculum in marketing with its six separate courses.

Business owners, managers, employees, and other entrepreneurs in the satellite locations appear to be more in need of the basic marketing program than their business counterparts in the immediate Poznan area.

4- The Institute Director and the second coordinator are recognizing and responding to market needs both in the immediate Poznan area and in the satellite locations. Some of the resulting activities or courses and seminars are not, however, part of the original three year project plan. Therefore, it is difficult to achieve recognition for specialized courses in specific industry areas such as banking, ISO 9000, TQM, etc. within the structure of the project. Although these additional efforts are very commendable, the Institute Director and Assistant Director need to understand that these achievements must be viewed as additional, or over-and-above, the project goals, and not substitutes for them.

5- During my second observation both the Director and second Coordinator solicited my input on a number of issues regarding the overall operation of the Institute in Poznan. I commend them for their willingness to discuss important issues and to consider alternative solutions.

RECOMMENDATIONS:

1- Focus on the satellite locations as a means of meeting the Institute's project goals for the basic marketing series (six courses).

2- Collect course evaluations on a regular basis. Communicate the results of these evaluations to each instructor. In addition, use the data from each instructor's course as a basis for providing pedagogical assistance and coaching. An English language version of the evaluation currently used is attached (attachment C).

3- Increase two-way communications between the Poznan Institute and the CETE staff in Ohio. Provide information (before-the-fact) regarding any need for deviation from original project objectives and targeted outcomes. These additional communications should include qualitative and descriptive information to help the CETE staff understand market variances in the Poznan area.

4- Continue to expand beyond the basic courses with niche course offerings as the market indicates (such as ISO 9000); however, provide these in addition to the basic courses as required by the project (again, basic requirements can be met through satellite operations). Communicate these additional successes, along with the required course activities, to the Solidarity staff in Gdansk and the CETE staff in Ohio. They are

all something to be proud of! In addition, they may prove to be an important source of revenue in future years.

5- Build on your good relationships with the Chamber of Commerce leaders in your satellite locations. These commerce leaders are involved in the change from government regulated to private operation just like many industries. They need and can benefit from your help. It's a win, win situation.

MISCELLANEOUS

The following miscellaneous activities were completed while participating at this location.

1- Brief conference with instructor of Marketing Research Course.

2- Presentation to 3rd year business students at Economic University organized by Professor Cyrson. "Sales Promotion in a Market Economy."

3- Attended Instructors Conference on Friday and Saturday. assisted by an interpreter. Had an opportunity to participate in discussion and to speak at length with three business representatives.

4- Presentation to teachers and administrators of Economic School in Leszno (organized by coordinator for branch location, Stanislov Wozniczak. "The Role of Economic Education in Poland's Developing Market Economy." Presentation was covered by local print and broadcast media.

5- Assisted new Institute secretary to learn AMIPro [Word Processing program].

6- Attended Total Quality Management Class in Gorsow (included introduction to ISO 9000 series of Quality Manufacturing Process). I was introduced as consultant along with Zdzislaw Krajewski the Institute Director.

7- Attended Tax Class in Lesno along with Institute Director, Project Director, Solidarity Representative and interpreter.

8- Participated (along with project director) in presentation to teachers of secondary schools and their administrators. Event covered by local media. [different group than in # 4)

9- Attended a meeting (along with Project Director and Institute Director), with Vice Mayor of Voivodship and Public Relations personnel.

10-Toured Poznan Consumer Goods Fair with the assistance of the Institute Director (secretary provided translation).

11-Assisted with presentation to Director of USAID for Poland, Donald Presley, during his visit to Poznan Institute (attachment D).

12-Discussed evaluations of Finance Class with Institute Director and made recommendations regarding how to handle consultation with instructor.

13-Meeting with instructors responsible for the writing of Retailing Instructional Unit.

Bialystok

(FIRST OBSERVATION, JANUARY 24 - FEBRUARY 4, 1994)

EMAIL CONNECTIVITY:

With the assistance of the Institute Director, I was able to make contact with the appropriate person in the University Computer Science Department regarding Internet connection. The computer lab director indicated that a full internet connection for the new Institute location would probably cost approximately $200.00 per month. I was not able to determine what Email connection alone would cost. It should be no more than half, if that much [perhaps $50-100 per month].

Initial attempts to send Email from the student lab were not successful (apparently the students had caused some type of problem with the software on the laboratory computers). However, I was able to use Telnet (not a practical means of sending Email as it is very slow) to access computers in Virginia [OSU system down for 3-4 days] and to send Email via those systems.

On Friday, the last day of the first two week visit, arrangements were made to allow access to the mainframe terminal in the basement of the Computer Science Building. I was successful in transmitting a message to Elzbieta at Ohio-State and two additional messages to colleagues in Virginia.

INSTRUCTIONAL MATERIAL DEVELOPMENT:

I met for a brief period with the instructor who has been given the responsibility of completing the Human Resource Management instructional guide. He is also Assistant or Vice Dean of the Economics Program(?) at the University. He had a brief list of major topics that he felt should constitute the HRM course (see one page outline of Human Resource Management in attachment E). I prepared an detailed outline with subtopics and gave this to him during a brief encounter on a subsequent day (see Human Resource Management - - Topics for consideration contained in Attachment E). I was informed by the Institute Director that I would have additional time with this instructor during my second two week visit. At that time--with the assistance of an interpreter, I would be able to provide additional guidance in the development of a teaching unit.

Based on my brief conversation with the instructor, I felt that there was some reluctance to put his thoughts on paper so that other people could teach from the outline. I suggested to the Director, during a separate session, that if the instructor was to be expected to both teach <u>and</u> develop the instructional

material, that perhaps he would be more forthcoming if he were paid separately for these two activities. The director indicated that he would consider this possibility.

PEDAGOGICAL DEVELOPMENT OF INSTRUCTORS:

I did not observe a uniform need for instructor training at this location. During my observation in the one session of the Tax course, the instruction was very practical [plus, there were a number of questions by participants]. It seemed to be exactly what the business people in the class needed. Instructors for that session (three members of a panel), were all from real-life jobs that deal daily with tax problems. One was also a university instructor.

In a second course, Entrepreneurship, I observed the final class period where a university psychology instructor was addressing management and leadership styles. His style of delivery was very good; however, he did not provide application to business by using specific examples. Additional use of student experiences from their work environment would also make the topic more meaningful and practical.

(SECOND OBSERVATION, MARCH 12 - 18)

EMAIL CONNECTIVITY:

I returned to the Technical University computer lab to use Email. The lab technician indicated that the software had been repaired; however, after attempts on two separate days, I was still not able to make connection. Email does not appear to be a high priority at the university at this time. It appears the primary users of the system may be the computer science staff (primarily one individual) that uses the terminal to the mainframe, located in the basement.

I was able to provide instruction to the new assistant, Magda, regarding the use of the Internet for sending Email. We did several dry runs using the student lab equipment. She would need minimal coaching when the software in the student laboratory is operational again.

INSTRUCTIONAL MATERIALS:

The promised time with the instructor responsible for development of the Human Resource Management unit did not materialize. Apparently, there were conflicts in his schedule that made it impossible for him to meet with me during my second visit.

In addition, several other unavoidable schedule changes made progress a little difficult during this second visit. With the Institute President confined to his home with a broken ankle, the Director was requested to attend a meeting in London in his place. However, the new assistant, Magda, was able to schedule a seminar regarding Human Resource Management on Thursday evening of that week. It was attended by the Assistant Dean of the Bialystok School of Business, the Coordinator of the EC program in Bialystok, the lady in charge of the Secretarial School, a substitute professor with knowledge of Human Resource Management, Magda, and myself. The meeting was directed by the Assistant Dean.

I presented a Human Resource Management outline designed for a 12-15 hour short course, and a planning paradigm for setting up the course (see attachment E). These suggestions were considered along with others from the group. Suggestions regarding instructional strategies appeared to generate the most interest. Suggestions and plans evolving from the seminar were to be forwarded by the Assistant Dean to the Institute President for action.

At the time of my departure, the original outline provided by the instructor in charge of developing the Human Resource Management course remained unchanged. The Institute President indicated that the Director would be in charge of compiling the final draft of the instructional unit.

PEDAGOGICAL SKILLS OF INSTITUTE INSTRUCTORS:

On Sunday (March 13th) I was able to attend the second day of a post graduate class. The instructor was Professor Jan Jesek from the Economics University in Lodz. Magda attended with me and provided translation. I attended three hours of the class and found it to be very interesting. The professor was knowledgeable and used a very effective approach when presenting his material. He had good examples from real businesses and provided ample opportunity for input from the participants. The participants asked questions and provided random comments in an uninhibited manner. Instructional techniques utilized during my observation of this course were very effective.

OVERALL OBSERVATIONS AND RECOMMENDATIONS REGARDING THE BIALYSTOK INSTITUTE LOCATION:

OBSERVATIONS:

Like their counterparts in Poznan and Rzeszow, the Institute staff in Bialystok were helpful and accommodating. This included

helping me to obtain a needed prescription at some inconvenience to the Director and his wife (a practicing physician) and assistance with a lost passport.

I was impressed with how well courses and instruction seemed to fit the target audience. Institute staff seem to have a very good understanding of the instructional needs of the community. The relationship between Institute staff and the local business community is also commendable. During my three weeks in this location, I was not appraised of any satellite activity.

Observations regarding specific activities follow:

1- Practical use of the Internet for Email by Institute staff using existing University connectivity is still a long way off for this location. The equipment is in a separate building at the Technical University. When the move to the new Institute office location is complete, the logistics for using the internet would require a taxi or bus ride to reach the facility. At present, local dial-in connectivity by modem to the university node is unavailable.

2- Like the other two Institute locations in Poznan and Rzeszow, the Bialystok Institute staff is relying on a subcontracting structure where an identified expert is asked to develop the instructional package. This can be very effective if the person selected to complete the material has the necessary expertise and sufficient time to devote to the project. While the individual currently contracted to complete the Human Resource Management instructional package is very qualified, he appears to be over extended.

3- Based on observation, I feel there are political constraints on the Institute Director that result from the Institute's position within the Bialystok School of Business (BSB). It appears that the objectives of the Institute are sublimated under the objectives of the BSB. Therefore, when a subcontractor, such as the one responsible for the HRM Unit, is also connected with the BSB, it is difficult for the Institute Director to exert the necessary authority to bring the task to completion.

4- For the most part, pedagogical skills of instructors selected to teach the three classes I observed were very good. (The Institute staff have utilized approved evaluation forms to address ineffectual teaching behavior in previous instances. This is commendable.)

5- Classes planned by the Bialystok Institute appear to be very much on target regarding the practical needs of the business community. The level of participant response in the classes I observed indicated a high degree of interest in the course

content.

RECOMMENDATIONS:

1- Due to the limited availability of Email capability via university facilities, I recommend the leasing of a dedicated number directly from NASK in Warsaw. The information and contact persons/numbers are reported under the Poznan portion of this report.

2- Institute staff should reconsider the current procedures utilized for development of instructional materials. As a minimum, consideration should be given to expanding the list of individuals contracted to develop instructional units. In addition, payment for instructional materials development should be separate from any other activities performed by that subcontractor (such as teaching classes).

3- Require each instructor to have students complete a combined course and instructor evaluation for each class (I believe this is currently done in some cases). Utilize the results from the evaluation to support one-on-one consultation with individual instructors as needed regarding student satisfaction with content and pedagogical styles.

MISCELLANEOUS:

1- Addressed an English language class at the University. "Comparisons of U.S. and Polish Economies and Student Lifestyle."

2- Addressed second English language class at University and repeated topic from one above.

3- Attended banquet for students receiving their certificates for completing the Entrepreneurship Course.

4- Toured Everest Furniture Company and interviewed Regional Manager.

5- Addressed third English language class at University.

RZESZOW

(FIRST OBSERVATION: FEBRUARY 05-17, 1994)

EMAIL CONNECTIVITY:

After a brief discussion of the possibility of an internet connection for this location, the Institute President, Adam Goral, suggested that he investigate the dedicated connection available through NASK [rather than attempting to work through the Technical University here in Rzeszow]. He made contact with Hofmokl using the number that I provided and learned that the initial connection would cost $75.00 with a monthly fee of $75.00 to be paid quarterly. In addition, the first month's rent is due with the connection fee. Connection is very simple and will connect the Institute's computer to the Internet for Email capability. If other Internet services are needed, they may be added for additional monthly fees. Adam must request the connection in writing and pay the first $150.00 fee. In this way the system could be connected in time for my next two-week observation. This will allow for training of Institute staff in the basics of Email. Email capability could facilitate communication between the three Institute locations as well as OSU. One disadvantage to this current system is that long distance charges are incurred time an Internet connection is made. Hopefully, at some time in the near future an Internet Node can be located in Rzeszow that will eliminate the long distance tariff.

INSTRUCTIONAL MATERIALS:

The development of an instructional unit on Salesmanship was on target at this location. They had received the suggested outline from Elzbieta that I had prepared with a translated version in Polish (attachment F).

Although I'm not sure it was expected, requests were made to Poznan and Bialystok to send a representative to work along with local specialist. The seminar was attended by a representative from Bialystok, and local specialist, Teressa, and Krzysztof. A third instructor joined the group on Friday to address target market and topics. The meeting was productive and resulted in several decisions and the selection of possible topics. These topics were prepared in draft fashion on Friday evening and presented to me on Saturday. I support the topics selected with the understanding that they are to be used specifically for retail sales personnel. Different topics would be necessary for Corporate or Contract [business to business] sales personnel.

PEDAGOGICAL DEVELOPMENT OF INSTRUCTORS:

Since this observation fell during a semester break, no classes were scheduled. Therefore, it was not possible to observe Institute instructors during an on-going class.

(SECOND OBSERVATION: MARCH 21 - 30, 1994)

EMAIL CONNECTIVITY:

The approved access number had not arrived from Prof. Hofmokel, NASK director. Adam had called and continued to call two additional times during my stay. Finally, on the last day I was in Rzeszow, a fax arrived with the necessary approval. The Institute staff planned to have a modem installed within the next few days so that they could begin to use this new capability. I installed a shareware package (Procomm) on their computer and photocopied some material that explains Email on the Internet. I also requested that they practice the use of Email by communicating with me until they are comfortable with the procedure. [After returning to the U.S. I sent a short Email message to the newly approved address for the Rzeszow Institute. Within a few days I received a reply. They had installed the required modem and were able to complete Email access via the Internet. They have also communicated with the CETE staff in Ohio using the new Internet connection.]

INSTRUCTIONAL MATERIALS:

During this observation I was shown the progress that had been made with the Salesmanship Unit. The T-form portion of the unit had been completed in accordance with the project requirements. Visual impression was good and when translated to me verbally, made sense. It is directed at the retail level of selling. A draft of all overheads and other support material was also ready with changes marked. The secretary was in the process of entering these changes in the computer. I feel this unit will be presented on time and in the format and manner required for the project.

In addition, I assisted Adam with interpretations of material for the Team Building Unit. From what I observed, this unit will also meet project specifications.

PEDAGOGICAL SKILLS OF INSTITUTE INSTRUCTORS:

Although a new session of the Post Graduate class was beginning the week after I departed, no classes were in progress during my second visit. Because of this it was not possible to observe instructors conducting classes. I did attend the final session of a class for unemployed persons in Krasno (satellite location) with Krzysztof, the Institute Director. Krzysztof

presented the certificates of completion. Later, I had the opportunity to visit with the satellite manager. He seemed nice and capable of doing a good job in that location. The satellite office is located in a prominent building and location.

OVERALL OBSERVATIONS AND RECOMMENDATIONS REGARDING THE RZESZOW INSTITUTE LOCATION:

OBSERVATIONS:

First, there appears to be a very good working relationship between the Institute Director and the Institute President. This has the effect of promoting teamwork between the two persons. Secondly, the relationship between the Institute and the University is very clear and I think positive for both units. Observations regarding specific aspects of Institute operation follow:

1- Interest by institute staff in obtaining and using Email connectivity was high. Plans include making the Internet available to members of the Entrepreneurs Club as an additional benefit (good PR).

2- Instructional material development is on target. A major reason for this success appears to be that when an expert is contracted to develop an instructional guide, they are provided with a tentative topical outline at the beginning. This gives the subcontractor some idea of what the Institute staff is looking for and the format desired. In addition, the Institute's staff does not distance themselves from this responsibility. Rather, they stay in touch with the contractor and his/her progress. When necessary, they adjust or finish incomplete work.

3- Like their counter-parts in the Poznan and Bialystok Institutes, the Institute staff in Rzeszow appears to be effectively reading the local market regarding courses needed. Classes in investments have been successful along with courses in banking. These are beyond the scope of the present project; however, Institute staff recognize this and plan these courses in addition to those included in the project. The courses in banking may prove to be an important source of income for future Institute operations.

4- I am unable to comment on the pedagogical skill level of Institute instructors as I was unable to observe any classes in progress. Classes had ended before my arrival or were starting after my departure.

5- Institute staff solicited my input on a number of issues including the organizational structure of the Institute and individual responsibilities of Institute staff.

RECOMMENDATIONS:

1- Utilize the new Email capability via the Internet to build contacts in other parts of Poland and in other countries. These contacts can be very useful in future Institute activities or with possible future projects.

2- Continue the current practice of providing subcontractors with tentative outlines to help start them on the development of instructional material.

3- Proceed with the development of additional instructional materials related to salesmanship and sales management for additional target market groups (i.e. business to business sales).

4- Utilize evaluation forms in each class to provide an empirical base for consulting with Institute instructors. This information can be very useful when coaching teaching staff.

5- Proceed carefully with any reorganization of the Institute. The position of Director is a full time job.

MISCELLANEOUS:

1- Made one presentation to the graduates of the post-graduate program on Saturday. "Observations Regarding Polish Manufacturing, Distribution, Retailing, and Infrastructure in Relation to Economic Growth in The World Market."

2- Toured Sanwil Plant in Przemysl and interviewed Plant Manager.

3- Toured Bocmen Manufacturing and interviewed Controller and Plant Manager.

4- Attended presentation of certificates for final class for unemployed in Krasno. Also met with satellite manager and visited office. Very nice location.

SUMMATIVE OBSERVATIONS REGARDING OVERALL PROJECT OPERATION

In addition to the observations and recommendations recorded for each of the individual Institute locations, the following pertain to overall project operation.

1- In all three Institute locations, content experts contracted to develop instructional materials appeared somewhat reluctant to provide detailed T-form teaching guides. This was especially evident in Poznan and Bialystok. Apparently, the feeling of these experts is that if they record their knowledge about a specific subject, they may be giving up their competitive advantage in remaining "the local expert" on that subject area. I feel they fear losing future employment to someone else that may be able to take the outline and teach the course.

Recommendation: In future projects that include the development of instructional materials, tie payment of project funds for these instructional materials directly to the successful completion of each unit.

2- It was surprising to learn that the three institutes operate, to a large extent, in isolation of each other. It would seem beneficial to all three to operate more as a national team. In reality, once the joint meetings called by the CETE staff and/or Solidarity ended, each Institute's staff returned to their respective locations, where for the most part, they worked independently of the other two Institutes.

Recommendation: In any future projects, include staff development training in teaming. This should be included as part of the initial staff training. In addition, pay special attention to making additional cross-location assignments to encourage continued communication and team building at the national level. For example, three coordinators, one from each Institute, could be assigned to develop an Instructional Unit. One of the three would have primary responsibility.

3- The current project was established in a manner to provide decreasing financial assistance from USAID in each successive year while the Polish Enterprise Institutes picked up increasing responsibility. This is a normal and generally effective way of helping the recipient establish confidence while gaining independence. However, most of this funding was tied to operating expenses and not to the completion of specific tasks or products. This could account for part of the difficulty in bringing target assignments in on time and in a format to meet project specifications.

Recommendation: In any future project connect a portion of the total funding to completion of specific tasks and products to be submitted on schedule and according to project specifications.

4- Although I am not fully informed of the role of the Polish partner in this project, observation of project operations within each Institute lead to the following conclusion. Where a project, such as this, is operated with a primary in-country partner (e.g. Department of Labor, Solidarity Foundation, etc.), there is a need for greater presence by that partner in ongoing project activities. (This may require additional support to enable the Polish partner to provide the necessary staff to assist with project activities.)

Recommendation: Work closely with any Polish partners during the initial project proposal to determine additional staff needs required in order to provide full project support. Include an appropriate level of financial support for any additional positions or expense within the base budget of the proposal.

REPORT SUMMATION:

The impact that the three Polish-American Institutes and their satellite operations are making on the Polish transition to a market economy is commendable. One only needs to sit in a class or attend one of the graduation activities to observe first-hand, the growth by individuals enrolled. The Institute staffs are effectively reading market needs for instructional topics and in general, providing the appropriate level of teaching expertise and pedagogical/andragogical process.

It is obvious that a high level of mutual respect exists between the Polish individuals working with the project and the CETE staff and consultants. In my opinion, this positive relationship exists because individuals and traditional institutions are respected and valued as well as project goals and objectives.

Personally, it is important to note that my three month consulting assignment with the Polish-American Enterprise Institutes in Poznan, Bialystok, and Rzeszow was an exceptional learning experience. I gained insights about Poland and other parts of Central and Eastern Europe that could not have been obtained in any other fashion.

I especially enjoyed getting to know my Polish contacts and working with them on a daily basis. They were all very helpful and provided the personal assistance that made my consultancy a pleasant experience. Special thanks to Donata, Renata, and Eva in Poznan, Magda in Bialystok, and Edyta in Rzeszow. They provided assistance with translation and other daily activities that would have been difficult, if not impossible, without them. I hope to have the opportunity to work with the Institute coordinators and other personnel again in the future.

ATTACHMENT (A)

FAX MESSAGE

TO: Zdzislaw Krajewski

FAX: 885 61 543 521

FROM: John Turner (Donata, please translate--Thanks, John)

FAX: 885 219-45

==========

Zdzislaw,

I have attached a suggested agenda for the seminar that we discussed. Please change as needed. I am also listing below suggested topics for each of the main presenters. Again, change, add, delete, etc. as needed.

Suggested Topics:

* The Changing Business Environment:
  Government
  Banking
  Taxes

* The Changing Business Environment:
  Consumers
  Demand

* Changes Needed in The Structure and Framework of the Business Firm to Accommodate Changes in Environment.

* Changes in Methods of Managing Employees(Human Resource Management)

* Impact of Technology on Business Operations:
  Software Applications (e.g., Inventory Control and Spreadsheets--how they can be used to help business)

* Impact of Television Technology on Consumer Attitudes, and Resulting Changes in Business Attitude and Operations.

Please feel free to add, delete, or change any topics. I am open to your suggestions. Please let me know what you think.

John

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SEMINAR FOR INSTRUCTORS

Content/Trends Update and Pedagogical Development

Sponsored by: the Polish/American Enterprise Institute: Poznan

Date:_____/_____/_____

Location:_____

==========

Agenda:

1400: Introductions and Explanation of program.

14:30 Presentation: "Pedagogical Design of Instruction Intended for Lay Business Men and Women." Dr. John E. Turner, Old Dominion University, Norfolk, Virginia. CETE Consultant.

15:30 Topic # 1 (to be selected from list on separate page with presenter also selected by Zdzislaw)

16:15 Small group discussion of Topic # 1 with each group having designated leader. Group reports at end of 15 minutes on how the topic should be presented to business men and women in the institute classes. John Turner will moderate the discussion with assistance from interpreter.

16:45 Topic # 2 (to be selected from list on separate page with presenter also selected by Zdzislaw)

17:30 Small group discussion just like topic one.

18:00 Adjourn for evening.

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DAY TWO

09:00 Topic # 3 (to be selected from list on separate page with presenter also selected by Zdzislaw)

09:45 Large group Brainstorming session regarding how the topic could best be taught with practical application to business men and women. (Brainstorming session moderated by Turner with assistance from interpreter, and one audience volunteer to record on chalkboard.

10:00 Topic # 4 (to be selected just like 1st three)

10:45 Small group discussion with appointed group leader. Groups to report out after 15 minutes regarding methods of providing practical application during Institute classes. (moderator, Turner)

11:15 Break (refreshments)

11:45 Topic # 5 (same method)

12:30 Group discussion using some method of generating input from participants. (moderator Turner)

13:00 Conclusion and summation of seminar (Zdzislaw)

13:30 Adjourn

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ATTACHMENT (B)

DO: Dyrektor Krzysztof Krajewski
Polsko-Amerykański Instytut Przedsiębiorczości
w Poznaniu

Fax: 885 61 543 521

OD: Bogusław Plawgo
Instytut Przedsiębiorczości w Białymstoku

Stron: 1

DATA: 02.03.1994 r.

W PRZYPADKU NIEPRAWIDŁOWEJ TRANSMISJI
PROSZĘ O TELEFON POD NUMER (48-85) 219-45

Informuję, że nie widzimy przeszkód aby John Turner przyjechał później do Białegostoku. Zmienimy program jego wizyty, tak aby wszystkie zadania mógł wykonać w krótszym czasie.

Koordynator Instytutu
Przedsiębiorczości w Białymstoku
Bogusław Plawgo

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PS. Termin planowanych warsztatów z przedsiębiorczości w Białymstoku podamy na początku przyszłego tygodnia.

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ATTACHMENT (C)

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: _____ Sex: ☐ M ☐ F

Title/Topic of this course _____

Location: _____

Your Current Occupation: _____

Your Occupational Goals: _____

Does your current job involve teaching others? ☐ Yes ☐ No

Does your current job involve supervising others? ☐ Yes ☐ No

Highest Level of Education: _____

Field of Study _____

How did you hear of this program?

- ☐ Advertisement
- ☐ Friend
- ☐ Teacher/Professor
- ☐ Work
- ☐ Found out on my own
- ☐ Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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ued from front page.

I would take this course again.	12.	5	4	3	2	1
I would recommend this course to other interested parties.	13.	5	4	3	2	1
The Video Presentations were well suited to the course.	14.	5	4	3	2	1
The Video portion of the course was of high quality.	15.	5	4	3	2	1
Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

LE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A
OGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

mment here on the overall quality of the program:

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
As a result of my participation in this program I have achieved:						
Professional Advancement	1.	5	4	3	2	1
Greater Professional Skills	2.	5	4	3	2	1
Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
Diploma or Certificate of Completion	4.	5	4	3	2	1
Salary Increase	5.	5	4	3	2	1
As a result of my participation/training in this program I am now:						
Better Able to Manage People	6.	5	4	3	2	1
Better Able to Complete Research	7.	5	4	3	2	1
Better Able to Direct Projects	8.	5	4	3	2	1
Better Able to Teach Others	9.	5	4	3	2	1
0. Better Able to Make Policy	10.	5	4	3	2	1
1. Better Able to Lead Company	11.	5	4	3	2	1
2. I attended the program regularly	12.	5	4	3	2	1
3. The project staff is very helpful	13.	5	4	3	2	1
4. The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
5. The overall program will have long lasting benefits	15.	5	4	3	2	1
16. The overall program seems to be well organized	16.	5	4	3	2	1
17. Access to instructors and project staff is quite good	17.	5	4	3	2	1
18. I have been able to establish valuable business contacts	18.	5	4	3	2	1

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Thank you for your time and cooperation.

ATTACHMENT (D)

POLISH AMERICAN ENTERPRISE INSTITUTE, POZNAN

Overview of Institute Activities

Poznan

- The basic course began In January and will continue until June 1994 (150 hrs. 14 enrolled.

- 11–17 April Marketing Course (40 hrs.)

- 21–25 April Finance Course (50 hrs. anticipate 20 enrolled)

- 17–21 April Business Law and Finance (To be held on the Ferry traveling between Gdansk andHelsinki) [25 enrolled]

- 11 March – 30 June, Post–High School Study (Banking, 120 hrs. and 20 enrolled)

* Additional Activities

  - Modern Techniques of Management (Designed for the Board of Directors for the Regional Railway Commission)

  - Computer courses

  - September 1994 Advanced Course In Banking

  - Established Email account and began communicatins with Ohio–State

Satellites:

Three of the four satellites: Leszno, Gorzow, and Gniezno were established on 1 December, 1993. The fourth, Konin, was established on 1 November, 1993. All are managed by one individual with the exception of Gniezno, where two individuals share this responsibility. [Refer to Charts for information regarding course activity.]

Leszno:

- The satellite, in cooperation with the High School of Marketing and Management established a Management Club for local business personnel. The primary goal of this Business Club is to support the activities of the Institute.

- A very good relationship was established with the governmental leaders within the Voivodship.

- Promotion for the Course in Stock Exchange has been completed.

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Konin:

- Agreement on cooperation between the City Authorities and the Instutitue Management was successfully completed. In addition Authorities for the Agency for Regional Development also participated.

- Enrollment for the basic course has been registered.

Gorzow:

- Coorperatin with the Western Chamber of Commerce and Agency for Regional Development was effectively established.

- An advanced course for managers, based on materials from the basic course, will begin in September.

Gniezno:

- A sixty hour Marketing Course wil be organized. This is twice a long as the normal course due to feedback from the market in this area. Scheduled to begin at the end of May, 1994.

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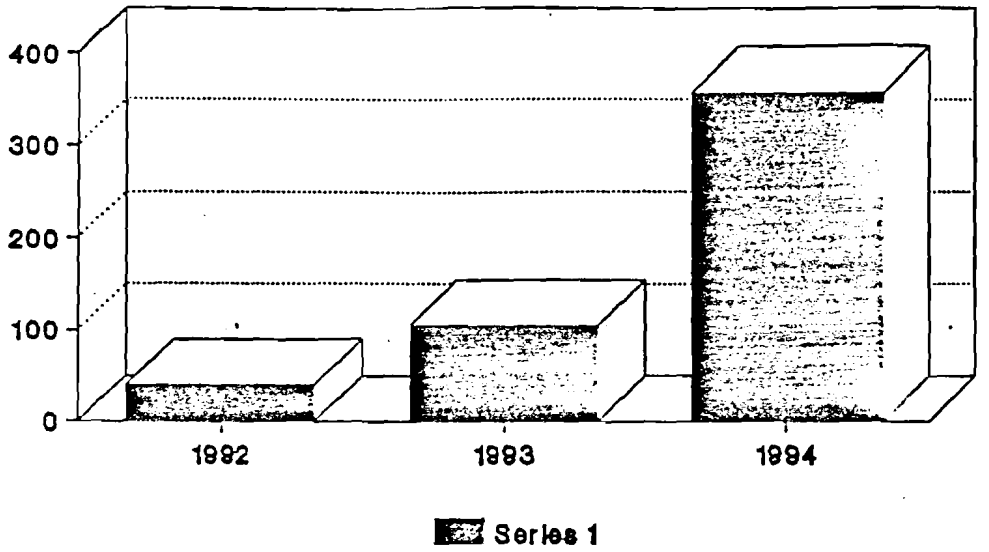
Course Participants

Enrollment Trend (1994 data is for 9 mo)



Polish/American Enterprise Institute

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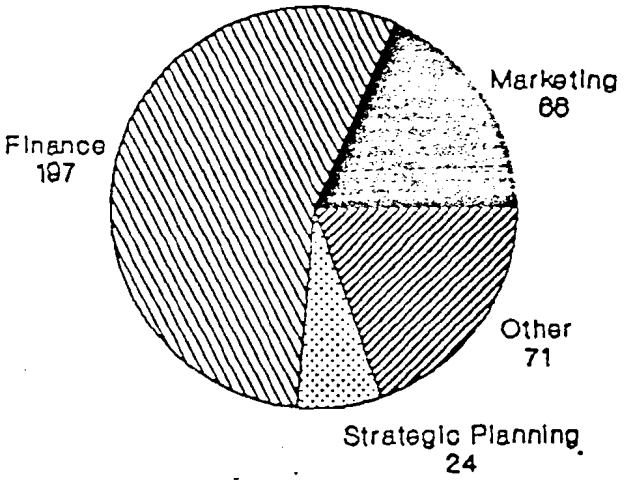
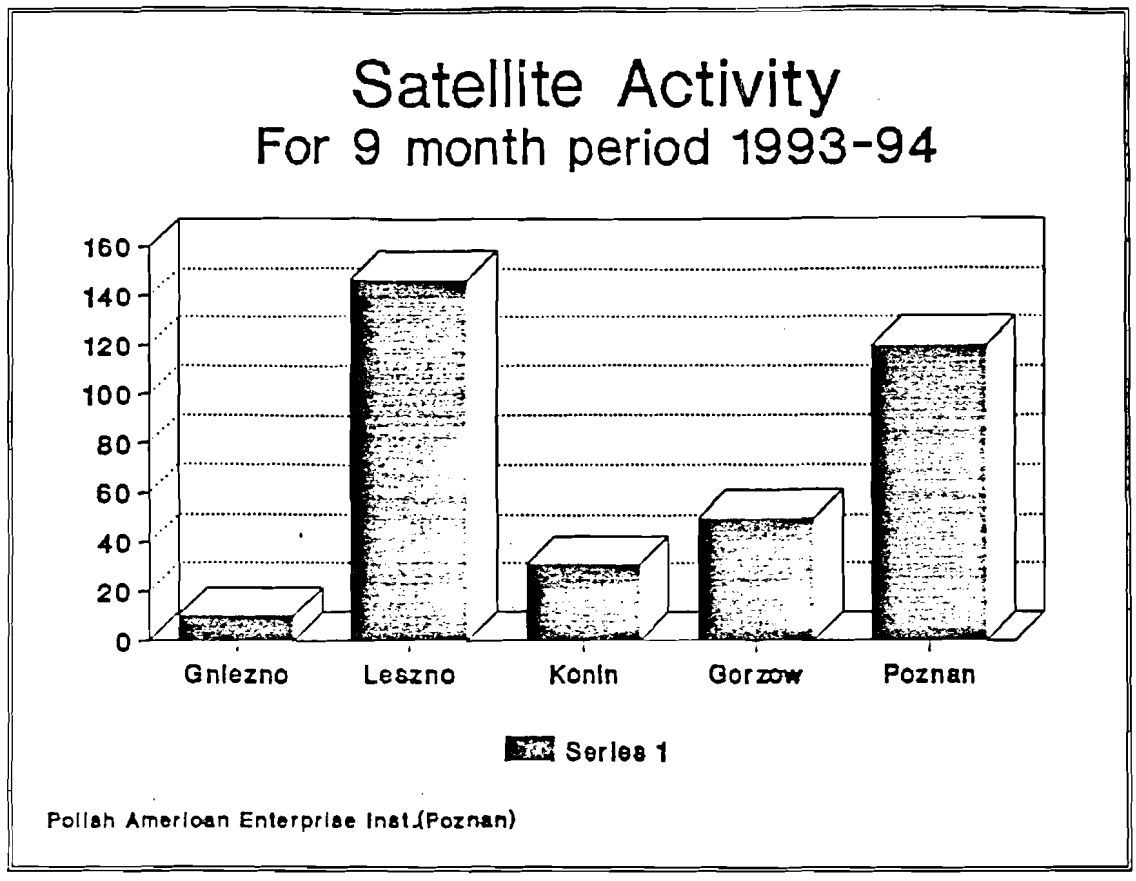
Enrollment by Types of Courses

For 1993-94 (9 months)



Polish American Enterprise Inst.(Poznan)



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ATTACHMENT (E)

HUMAN RESOURCE MANAGEMENT

3 days (5 hours per day), 10-15 students

1. An individual and a group of people in a company.

2. Managing skills and competences.
   - rules of taking managing decisions/individual and group decisions
   - case study

3. Employees' needs and expectations.

4. Process of recrutment and selection of employees - questionnaires and their usefulness.
   - case study

5. Motivation as a managing function - motivation models, motivating job organization.
   - case study

6. Structure and evaluation of motivating system.
   -case study based on own company

7. Evaluation of work effectivity and efficiency.
   - applying of evaluation sheets

8. Attitudes and organization of manager's job - test on organization and using working time.

9. Sources of manager's power, leadership styles.
   - test on leadership styles

10. Controll (methods and effectivity) in managing people.

11. Conflicts and dealing with conflicts.
    - test on manager's behaving in conflict siyuations

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HUMAN RESOURCE MANAGEMENT

(Topics for consideration)

==========

I- Introduction to Human Resource Management

- Human Resources as a Competitive Advantage
- Organizational Focus on Quality
- Human Resource Functions
- Who Performs HRD Functions
- Location Within the Organization
- Global Perspectives of Human Resource Management
  - (e.g., Japanese, American, European, etc.)

II- Employee Relations and the Legal Environment

- Legislative Requirements
  - National
  - Local Government
  - Company Policies
- Employee Safety
- Employee Health (Physical and Mental)
- Employee Security and Working Conditions
  - Physical environment
  - Job Sharing
  - Family Leave policies

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III- Organization of Work

- Organizational Goals
- Identifying major Duties to be performed
- Organizing Duties into Jobs

Task Analysis (within duties and jobs)

IV- Human Resource Planning

Review of Organizational Objectives

Determining Skills and Expertise needed for each Job Category

Analyzing existing Human skills and determining net skills needed

Developing a plan to acquire needed skills

V- Recruiting and Selecting Employees

Responsibility for recruitment and selection

Sources of Employees

Organizational Inducements in Recruiting

Employee Selection

Application Form

The Initial Interview

Applicant Testing

Followup Interview

Reference Checking

Physical (including drug) testing

Final Selection Procedure

Staffing International Locations

Expatriate Personnel

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Using Locals

Using a Combination of Expatriate and Local

VI- Human Resource Management Techniques

- Matching Employee Needs and Expectations with Company Goals
  - Company Goals and Objectives
  - Employee needs and Expectations
  - Achieving Congruency of Company and Employee Goals and Objectives
- Motivational Strategies
  - TQM as a Motivational Tool
  - Positive Motivators
  - Negative Motivators
- Leadership Styles and Motivation
  - Autocratic
  - Participative
  - Team Building

VII- Performance Appraisal

- Methods:
  - Management By Objectives (with or without employee input)
  - Work Standards (i.e. # of defects, etc.)
  - Critical Incident(s)
  - Checklists/rating scales
  - Forced choice or ranking techniques
- Providing Feedback (focus on positive vs negative)
- Dealing with career plateaus (employee & Company responsibility)

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Evaluating the HRM Function

Using Statistics (turnover, absences, complaints and grievances)

Using Attitude and Opinion Surveys

VIII- Employee Compensation

Defining the compensation system (salaried, hourly, commission, etc.)

Job Satisfiers and dissatisfiers

Types of rewards

Monetary (Flat rate, Piece work, job categories, commission, bonus, stock options, ownerships, etc.)

Non-monetary (Recognition, etc.)

Connecting compensation to performance

Employee benefit plans

Pension plans

Disability Insurance

Health Insurance (may include dental)

Life Insurance

Paid Vacations

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Pre-retirement planning

IX- Labor/Management Relations and Conflict Resolution

Legal environment regarding labor unions

Union Structure

Current trends in the Organized Labor Movement

Handling Labor Disputes/Conflicts

Disciplining Employees(includes dismissal)

Grievance Procedures

Arbitration

X- Communication and Information Systems

Communicating Safety Issues

Downward communications

Upward communications

Promoting free flowing communications while maintaining proper chain of command

Barriers to Effective communication

Computers and HRM Information Systems

Data Bases

Tracking

Getting help

XI- Training and Developing Employees

Orientation

Shared Responsibility (company and departmental)

Orientation Materials

Length and Timing or Orientation Training

Follow-up

Training Employees

Needs Assessment

Establishing Training Objectives

Using inside and/or outside trainers

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- Methods of Training
  - On-the-job
  - Apprenticeship
  - Classroom
- Principles of Learning
  - Motivation to achieve personal goals
  - Knowledge of results
  - Reinforcement
  - Overlearning, practice, and repetition
  - Managements role
  - Spacing of sessions
  - Whole or Part learning
- Evaluating training
  - Trainer/trainee
  - Reaction, Learning/content, Behavior, other results
- Training Management Personnel
  - Determining the need for Management personnel
  - Techniques for Training Management Personnel
    - Understudy assignments
    - Coaching
    - Experience
    - Job Rotation
    - Classroom courses-internal/University

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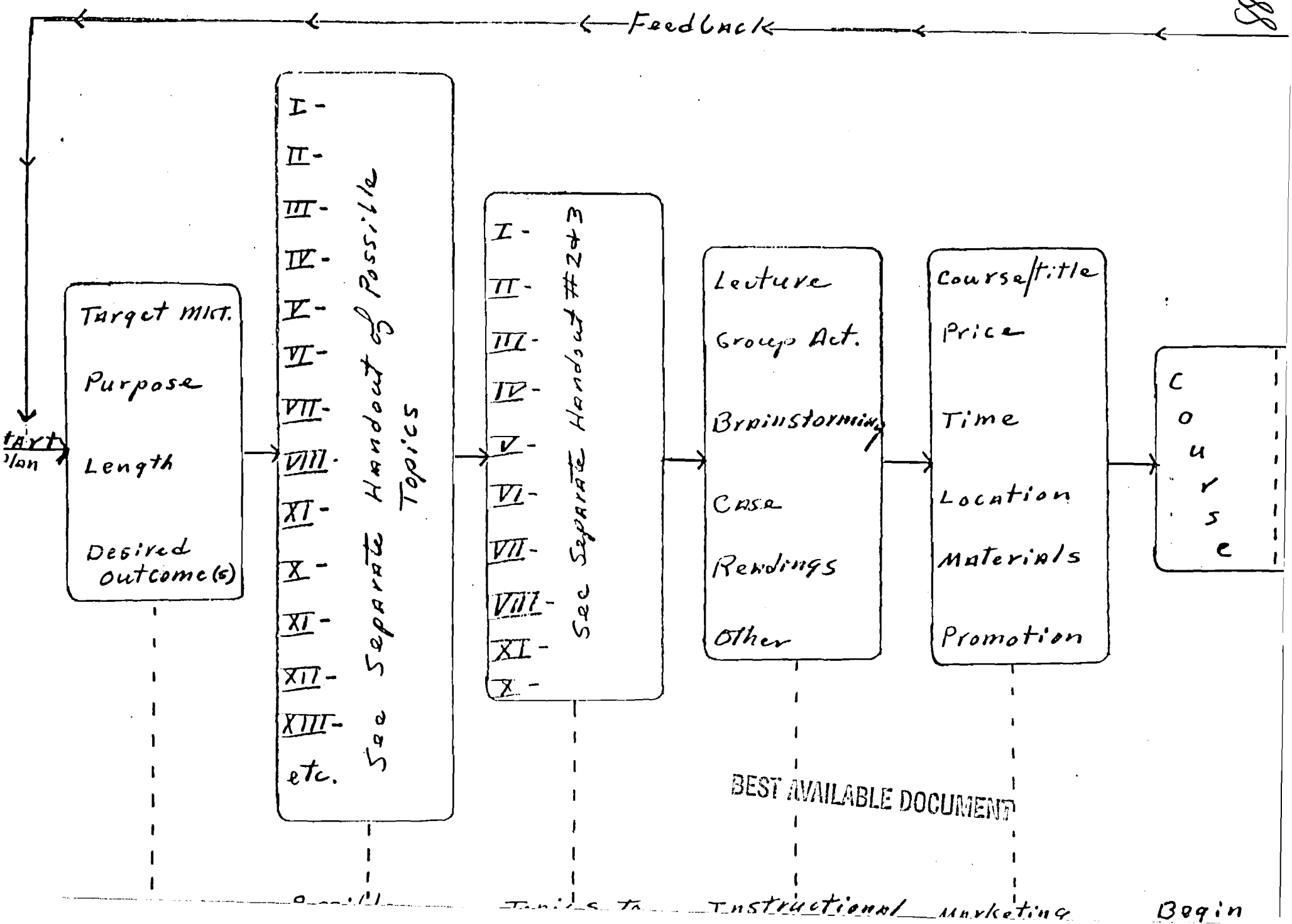
Finding a Short Course in MKT



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ATTACHMENT (F)

PERSONAL SELLING

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

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

A- The Marketing Concept (Brief review or Introduction)
(i.e. consider the client/consumer first to determine needs and wants, then manufacture, distribute, and retail)

B- Personal Selling As an Extension of The Marketing Concept
(Placing the consumers' needs and wants first)

C- Personal Selling as A Key Component of the Promotion Mix
[Promotion mix = advertising, sales promotion, publicity, and personal selling]

D- Sales philosophy: [recommend a consultative approach]
1- The salesperson as problem solver, providing solutions to client/consumer problems
2- The salesperson as market researcher, providing feedback link from client/customer

Part II: The Salesperson: Presenting a Positive Sales Image

A. Positive first impressions [appropriate attire and grooming, prompt arrival, and consideration of clients schedule]

B. Effective Communications [i.e. meanings are in people not in words, symbols, or gestures]

[Sender-encoding-media-decoding-receiver]
+ (Barriers to effective communication)

1- Verbal
a- oral (e.g. word choice, to joke or not to joke, appropriate topics, etc.)

b- written (e.g. letter writing, form, timing, legibility on order forms and reports, etc.)

2- Non-verbal communications
a) The handshake (culture dependent)
b) Where to look (culture dependent)
c) Facial expressions, posture, and gestures

---

[1]John E. Turner, Consultant, Norfolk, Virginia, 29 November 1993.

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C. Protocol: When to Pay for Lunch, bring gifts, etc.

D. Building Lasting Sales Relationships

E. Effective time management
   1- Focus (e.g. 20 % of customers contribute 80% of sales volume)
   2- Organizing and using sales records
   3- Analyzing sales records to facilitate future sales
   4- Personal time management

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

A. Know your company: Goals, strengths (competitive advantage), and historical perspective.

B. Product and service knowledge: Attributes, uniqueness, how to operate, service procedures, warranties, etc.

C. Strengths and vulnerability of competition

Part IV: Your Customer (individual or company)

A. Business clients
   1- Locating prospects
   2- Qualifying prospects
   3. Important information
      a- Historical perspective of clients company
      b- Clients company goals and operating procedures
      c- Understanding problems facing your client
      d- Assisting your client with problem resolution

B. When your clients are the ultimate consumers
   1- Determining consumer needs and wants
   2- Understanding consumer motivation to buy
      a) Psychological motives
      b) Social factors
      c) Self esteem and self actualization
   3- Influences on consumer decisions
      a) Family influence
      b) Significance of roles
      c) Social class
   4- Helping consumers find solutions (using knowledge from B.1-3 to help the consumer solve problems)

Part V: Effective Presentation

A. Preparation

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

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

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

D. Maintaining positive client/customer relationships

Recommended Reference:

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

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MANAGING A SALES TEAM

Part I: Locating and hiring the sales team

A. Using task analysis and job specification to establish requirements.

B. Sources of applicants

C. Selection based on job specification and applicant credentials

Part II: Training and motivating

A. Orientation training

B. Ongoing training updates (e.g. who is responsible?, how will training needs be determined?, who will develop training materials?, who will present training?, etc.)

C. Providing a positive motivational environment
   1- Providing clear job descriptions and assignments (for sales and sales supporting staff and making sure everyone is aware of each individuals assignment and achievements)

   2- Team building
   3- Compensation plans
   4- Benefit packages
   5- Non-financial incentives

D. Measuring performance and connecting to compensation

Part III: Territorial development and management

A. By geographical regions

B. By product line(s)

C. Combination

D. Planned competitiveness/rewards by region

Recommended reference:

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

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Dr. Cathy Ashmore and Dr. John Turner visit the Polish-American Enterprise Institute in Poznan.

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APPENDIX 2.0

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ESTABLISH SATELLITE OFFICES

QUARTLY ACTIVITY REPORT

FROM SATELITE CITIES :

BIELSK PODLASKI, SUWAŁKI, ŁOMŻA

FOR

JANUARY, FEBRUARY, MARCH 1994

SUWAŁKI

January

We made promotion of " Vat - Tax " seminar. In this order we contacted local media : Radio 5 station, Radio Białystok station and local press. We prepared and sent invitation, printed membership cards and evaluation forms.
We met with Agency for Regional Development " Ares " and Agency of Local Initiatives in Suwałki. We prepared to Basic Course " Start in Business " that would take place on the turn of February and March. We talked to local faculties to conduct this course, rented a classroom, evaluated the costs, booked a hotel for faculties.

February

We continued working on organization of Basic Course. We worked out the programme of course and a list of faculties, printed information materials and invitations. We promoted in local newspapers : Gazeta Współczesna, Krajobrazy, Kurier Poranny, Kurier Podlaski and radio : Radio 5 Station. We sent information about course to participants of our previous seminars who run businesses.

March

1-11 March took place Basic Course in Suwałki " Start in Business " organized for people who are already in business or want to start a business. The coordinator was on duty to accept payments, prepare a classroom, serve some drinks and cookies and take care for technical side of course.
21 March took place another Basic Course conducted by Grażyna Michalczuk.

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BIELSK PODLASKI

January

19,20 January took place Tax Seminar which was hold in building of Public Library in Bielsk Podlaski. The programme included 10 didactic hours. The faculties were : L. Etel, J. Kownacki. The participents of this seminar were the representatives of small businesses mostly running retailing stores. Seminar was promoted in local newspaper " Kurier Poranny ".
We prepared to new Marketing Course for " Unibud " firm.

February

3-19 February took place 72-hour Marketing Course for " Unibud " firm in Bielsk Podlaski. The classes were hold in firm's building. The participants of course were managing staff from different firm's department. The classes were conducted by A. Walicki, A. Kopczuk. At the end partcipants recived certificates. The result of this course is a project of a new seminar for this company.
We were in touche with city authority in Bielsk Podlaski . As a proof of our good relationship we handed our co-partners Banking Catalogue.
We talked to Regional Labour Office in Bielsk Podlaski about workshop for unemployed who were willing to start own businesses.
21,22 February we participated in seminar in Białystok organized by E.I. on topic " Retailing ". The istructor was prof Talarzyk.

March

We signed a new contract with Regional Labour Office in Bielsk Podlaski for workshop for unemployed on topic " Methods of Selling "which would has held 9-18 June.
We had made researches what kind of workshops are required and on base of it we planned seminars :
11 April - Marketing in Managing a firm
21 April - Changes in Tax Law
25 April - Forms of Records

ŁOMŻA

At the begining of this year our partner in Łomża House of Local Initiatives stopped its acctivity and we had some problems to perform duties overther. We attempted to find a coordinator Several times we met with directors of " Everest " firm in Białystok and Łomża to have our office in their firm.Finally we decided that a person from Białystk would be responsible for E.I. in Łomża. 18 March took place Tax Seminar .The classes lasted 6 hour and were conducted by Kownacki and Poznański.

TAX SEMINAR - Suwałki - January 21, 1994
(4 hours)

A list of Participants

1. Wiesław Grabiński, Suwałki, ul. Brzostowskiego 9
2. Krzysztof Karniej, 19-400 Olecko, ul. Kościuszki 27/17
3. Krystyna Moczulska, 16-300 Augustów, Oddział PTTK w Augustowie (nie podaje ulicy)
4. Krzysztof Jarosław Karczewski, Suwałki, ul. Grochowskich 17 B
5. Marianna Skowrońska, Augustów. ul. Zygmuntowska 29
6. Jerzy Juchniewicz, Suwałki, ul. Utrata 4 B m 9
7. Jan Stefanowicz, Suwałki, ul. Polna 48
8. Irena Bartosiewicz, Suwałki, ul. Emilii Plater 45 A m 17
9. Beata Olsztyn-Panasiewicz, Suwałki, ul. Utrata 9 m 6
10. Irena Degutis, Suwałki, ul. Kowalskiego 12 m 38
11. Danuta Jankowska, Suwałki, ul. Warneńczyka 22
12. Dariusz Wojciech Saweziew, Suwałki, ul. 1-ego Maja 17 B m 5
13. Beata Waboł, Suwałki, ul. Klonowa 49 m 54
14. Jadwiga Żelazko, Suwałki, ul. Młynarskiego (nie podaje numeru, ale jest nr telefonu: 67-85-88)
15. Jan Wysocki, Filipów, ul. Rospuda 8
16. Wojciech Stanisław Pliszko, Suwałki, ul. Utrata 2 m 90
17. Stanisław Olszewski, Suwałki, ul. Górnicza 7
18. Alicja Łabacz, Suwałki, ul. ! Maja 2 m 17
19. Kazimierz Cieśluk, Suwałki, ul. Lityńskiego 3 m 21
20. Dorota Budziecka, Suwałki, ul. Emilii Plater 41 A m 27
21. Renata Osewska, Piecki 27, 16-425 Taciewo
22. Artur Łankowski, Suwałki, ul. Bieleckiego 6
23. Danuta Mikucka, Suwałki, ul. Kowieńska 4 m 31
24. Marta Zalewska, Suwałki, ul. 1 Maja 25 m 4
25. Cecylia Jaśko, Suwałki, ul. Chopina 8 m 12
26. Krystyna Krzesicka, Suwałki, ul. 23 Października 19
27. Bogusława Milanowska, Suwałki, ul. Nowomiejska 14 A m 17
28. Jan Dembski, Suwałki, ul. Noniewicza 48 m 88
29. Alicja Szymczyk, Suwałki, ul. Kalinowa 5
30. Mirosław Skindzier, Suwałki, ul. Reja 54 A m 37
31. Wiesława Korotko, Suwałki, ul. Lityńskiego 15 m 21

ENTREPRENEURS PROFILES

TAX SEMIANAR - Bielsk Podlaski - January 19-20, 1994

Name	Address	Type of Business	Total Hours
1. Jan Bolakowski	Waszkiewicza 23 Bialowieza	Retail Store	8
2. Krystyna Lipczynska (F)	Poswietna 7m 15 Bielsk Podlaski	Retail Store	8
3. Krzysztof Lubowicki	Nowowarszawska 39/11; Hajnówka	Building Company	8
4. Niedźwiedzki Lech	Wł. Andersa 10 Bielsk Podlaski	Retail Store	8
5. Marianna Newińska-Pieniążek (F)	Widowska 6/34 Bielsk Podlaski	Retail Store	8
6. Halina Przeździecka (F)	Kościuszki 18/34 Bielsk Podlaski	Bank	8
7. Halina Szyło-Zielińska (F)	Nowowarszawska 21 Bielsk Podlaski	Bank	8
8. Barbara Truszkowska (F)	Poświętna 13/38 Bielsk Podlaski	Restaurant	8
9. Małgorzata Walędziak (F)	Mickiewicza 53/13 Bielsk Podlaski	Notary	8
10. Artur Oniszczuk	Piłsudzkiego 30 Bielsk Podlaski	Retail Store	8

TAX SEMINAR - Łomża - March 18, 1994
(6 hours)

A list of Participants

1. Ewa Moś
2. Jolanta Wydra
3. Dariusz Smuga
4. Janusz Tołpik
5. Grzegorz Liszewski
6. Anna Borowska

ENTREPRENEURS PROFILES

2 Seminars in Suwałki: *Start in Business* - March 1-11, 1994 and *Finance* - March 21, 1994

Name	Address	Name of Business	Type of Business	Total Hours*
1. Joanna Osiecka (F)	Słobudka, Suwałki	"Sobótka"	horticulture	60 + 6
2. Katarzyna Łabieniec (F)	Mickiewicza 41 Dąbrowa Białostocka		agriculture farm	60 + 6
3. Edward Sobiński	Utrata 46/2, Suwałki	Service Company	heating services	60 + 6
4. Teresa Gorko (F)	Waryńskiego 21/3, Suwałki	Village Government Office		60 + 6
5. Stanisław Olszewski	Górnicza 7, Suwałki	"Izolarz"	construction company	60 + 6
6. Józefa Cieśluk	Lityńskiego 3, Suwałki	"Ambit"	heating services	60 + 6
7. Krystyna Wasilewska (F)	Wiklinowa 21, Augustów	"Handel"	hardware store	60 + 6
8. Witold Mogielnicki	Utrata 6, Suwałki	Province Drainage Council	drainage	60 + 6
9. Nestor Świerzin	Mała 1, Suwałki	Retail Store	store	60 + 6
10. Celina Kuczyńska (F)	Reja 76/11			60 + 6

Total Hours included:

1. Entrepreneurship Module	12 hours
2. Management Module	12
3. Marketing Module	12
4. Finance Module	24 + 6
Total	66

(F) - Female

ENTREPRENEURS PROFILES

Marketing Course for 26 employees of UNIBUT Construction Company in Bielsk Podlaski, February 3-19, 1994

Name	Job Description	Total Hours*
1. Barbara Antosiuk (F)	Store Manager	72
2. Wiesław Brzeziński	Store Manager	72
3. Nina Brzozowska (F)	Vice-Manager	72
4. Janusz Domański	Store Mangaer	72
5. Tomasz Duryński	Marketing Manager	72
6. Antonina Filipiuk (F)	Trade Director	72
7. Jarosław Jurak	Export Manager	72
8. Władysław Justyński	Trade Director	72
9. Halina Kuryś (F)	owner of the wholesale firm	72
10. Bożena Lachocka (F)	Vice Director	72
11. Marian Łuczaj	Export Director	72
12. Janusz Matelski	an employee	72
13. Zofia Mikołuszko (F)	Chief Engineer	72
14. Alicja Minkiewicz (F)	employee of Technical Dept.	72
15. Mikołaj Nowicki	Transportation Manager	72
16. Janusz Panasiuk	Store Manager	72
17. Barbara Radkiewicz (F)	employee of Technical Dept.	72
18. Antoni Romanowski	an employee	72
19. Tamara Ruczaj (F)	Agrox Director	72
20. Ryszard Sadowski	Furniture Store Manager	72
21. Jan Stepaniuk	Vice Director of Trade	72
22. Adam Szilądź	an employee	72
23. Irena Załęsa (F)	an employee	72
24. Eugeniusz Wasilewski	an employee	72
25. Jan Mikłuszko	an employee	72
26. Walenty Szczurak	Manager of Production Dept.	72

Total Hours of the Marketing Course included:

1.	Management Module	- 8 hours
2.	Marketing Module	- 56
3.	Finance Module	- 8
	Total	- 72 hours

(F) - Female

Wspierają przedsiębiorczość

O nowych przepisach podatkowych, finansach, kierowaniu małą firmą, warunkach uzyskania kredytu bankowego, prowadzeniu księgi podatkowej, przepisach celnych można dowiedzieć się również w Suwałkach w punkcie informacyjnym Białostockiej Szkoły Biznesu. Mieści się przy Suwalskiej Izbie Turystyczno- Rolniczej przy ul. Kościuszki 71 tel. 54-94. Niektóre szkolenia są bezpłatne. (bd)

Reg

SUPPORTING ENTREPRENEURSHIP

If you want to learn more about new tax regulations, financial issues, managing a small business, requirements related to getting loans you may do this through **Information Center of Białystok Business School in Suwałki,** located at The Agro-Tourist Council, Kościuszki 71 str., phone# 54-94.
Some trainings are offered free.

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prawosławia – nadziejach, trudnościach i wyzwaniach". (dc)

Nieodpłatnie o VAT

Nieodpłatne, pięciogodzinne seminarium na temat „Praktycznych problemów VAT-u w prowadzeniu działalności gospodarczej" organizuje 21 stycznia o godz. 14 w sali konferencyjnej UW w Suwałkach miejscowy oddział Białostockiej Szkoły Biznesu.

W programie m.in. zmiany w prawie dotyczące podatków od towarów i usług oraz podatku akcyzowego, terminy rozliczeń, błędy w stosowaniu przepisów ustawy. (jh)

FREE SEMINAR ABOUT VAT

Białostocka Business School offers free 5-hour seminar about "Finding practical solutions to problems related to VAT while running a small business". It will held on January 21, 1994 at BSB. A program of the seminar includes such topics as: changes in law regulations and taxes on products and services, duty of excise, settlement terminations.

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Satellite Centers of the Polish-American Enterprise Institute in Poznań

Gorzów Wielkopolski

Training for directors of state and private companies on "ISO 9000 Standards".

38 persons x 8 hrs = 304

J.Turner was present at the training.

Training " A salesperson partner" = Marketing module

11 persons x 16 hrs = 176

Konin

From Marketing module:

"Modern techniques of sale"

16 persons x 10 hrs = 160

Leszno

15.02.1994

Training on "Stock market ".

65 persons x 8 hrs = 520

17.02.1994

Training on "Enterprise strategy during tax changes"

16 persons x 16 hrs = 256

21.02.1994

"How do we pay taxes?"

20persons x 8 hrs = 160

Gniezno

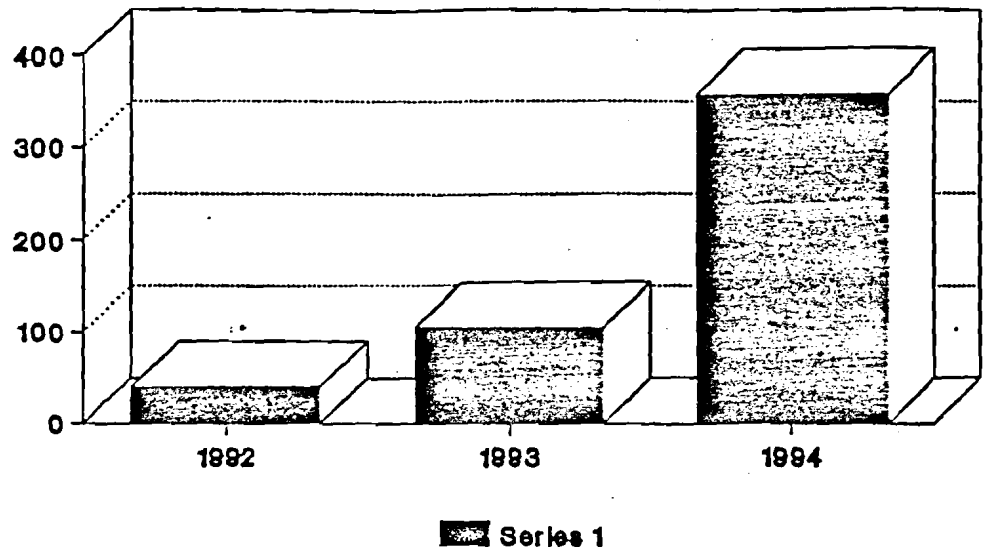
Promoting training on " Enterprise strategy"

15 persons x 6 hrs = 90

Total in all branches : 1666 persons / hours

Course Participants

Enrollment Trend (1994 data is for 9 mo)



Polish/American Enterprise Institute

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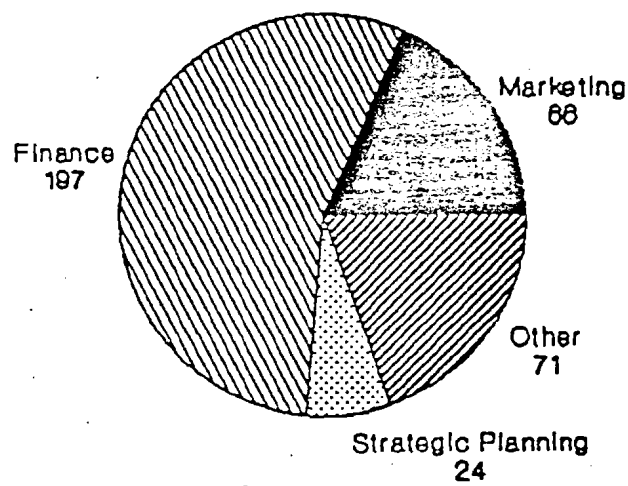
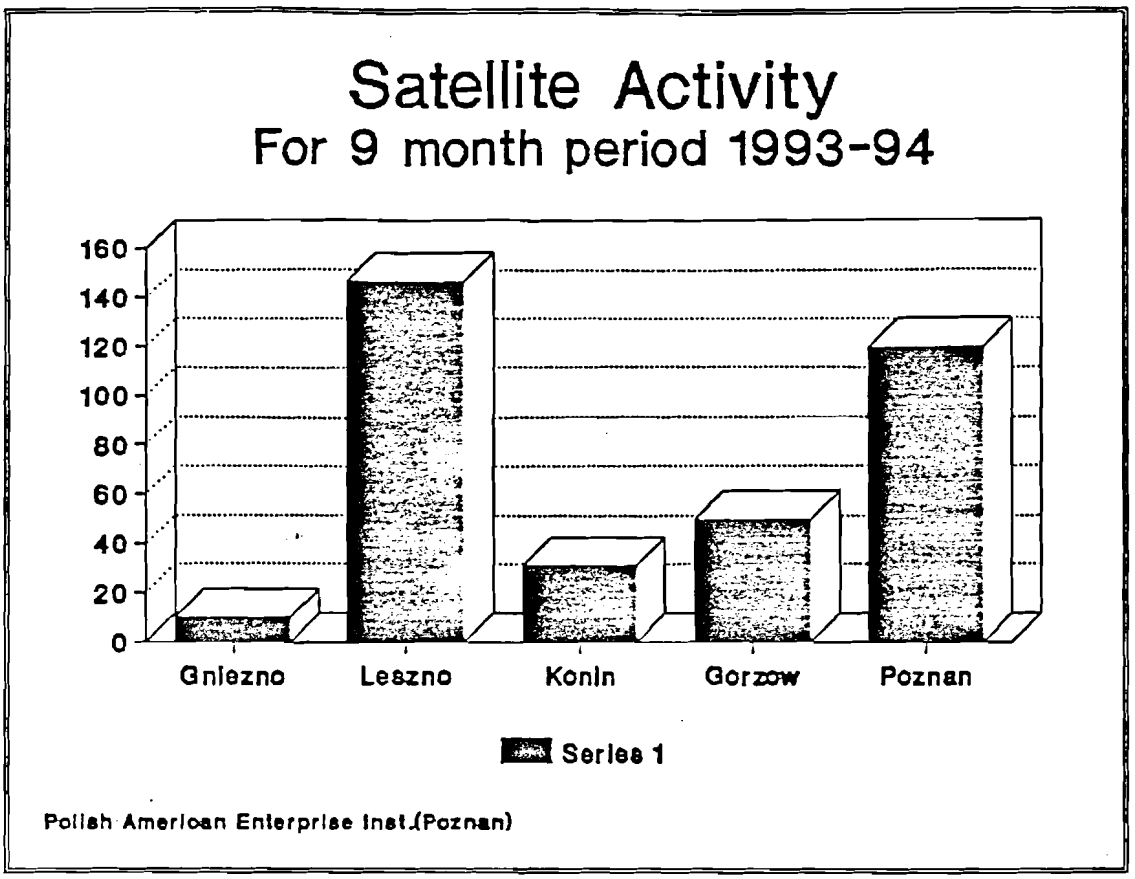
Enrollment by Types of Courses

For 1993-94 (9 months)



Polish American Enterprise Inst.(Poznan)



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Activity Report
A Satellite Center of the Polish-American Enterprise Institute in Poznań
Leszno, January 1994

1. The first task of this month was to promote the program of the Polish American Enterprise Institute - its seminars and consulting services (through a local radio station *"eL"* and local newspapers).

2. Undertaking the initial activities in order to establish a "Manager's Club" in Leszno. Making the first decisions - membership fee is 12.000.000 zlotys; PAEI is to receive 20% of the Club's incomes in return for providing resources for seminars. The Club will start its activities on February 5, 1994 and will be located at Computer Training Studio.

3. Making preparations to establish Postdiploma Marketing and Business Study.

4. January 1, Dr. John Turner from Old Dominion University met high schools teachers in Leszno to discuss "The Role of High Schools in the Process of Developing Entrepreneurial Skills of the Future Managers in Comparison with American Experiences in Creating Success Businessmen". The meeting was advertised by Poznań T.V., a local radio station *"eL"* as well as described in a local newspaper *"Panorama Leszczyńska"*.

5. Coordinators of the Center met representatives of Leszczyńska Economic Council in order to discuss mutual undertakings.

Future Plans for the Center:

February 5, grand opening of the "Manager's Club"

February 15, a seminar on Stock Exchange conducted by Dr. Matusiak and Dr. Wojciech Piotr

February 16-17 a seminar concerning financial changes and a new tax law "Economic Effects of the New Tax Policy and Changes in the VAT System" by Jerzy Wąsik.

February 26, Postdiploma Marketing and Business School starts its classes.

Activity Report
A Satellite Center of the Polish-American Enterprise Institute in Poznań
Leszno, March 1994

The major task of the Satellite Center in March was to prepare a meeting with Dr. Cathy Ashmore, the Director of the International Enterprise Academy at the Ohio State University.

The purpose of the meeting was to:
- present a program of the Satellite Center in Leszno
- meet representatives of local government
- discuss the role of International Enterprise Academy in creating a network between Enterprise Institutes and Business Schools.

The Program of the visit included:

1. A meeting with the Dean and the faculty of Marketing and Management School in Leszno.

2. Participating in a pilot seminar "Enterprises and New Tax System VAT in Relation to the Existing Law Regulations".

3. A meeting with the faculty of selected high schools and train-the-teachers institutions to discuss "The Role of High Schools in Developing Entrepreneurial Skills in Comparison with American Models of Human Resource Management".

4. A meeting with the President of Leszno City and Directors of Regional Council to discuss "Promotion and Economic Development in the Bearing of Mutual Expectations and Possibilities".

Each meeting was attended by the Director of the Polish-American Enterprise Institute Dr. Zdzisław Krajewski and journalists of local newspapers *"Panorama Leszczyńska"*, *"ABC"*, a local radio station *"eL"* and a cable T.V.

The Center continued the promotional campaign of the program. The Institute sent letters to twenty six small business owners offering:
- cooperation
- wide range of services related to consulting, market research, strategic marketing, writing a business plan etc.

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The Center prepared and implemented three-step seminar for brokers.

The program of the seminar comprised of:

1. The first step:

   - training for brokers - attracted 25 persons, fee 1.000.000 zlotys

2. Second step:

   - a computer training (CEK)
   - an English course - fee 1.500.000 zlotys

3. Third step:

   - a seminar for new stockbrokers (during weekend) - job training; 150 hour seminar, fee 10.000.000 zlotys, conducted by representatives of Stock Market Council and Academy of Economics in Poznań.

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Activity Report

A Satellite Center of the Polish-American Enterprise Institute in Poznań

Konin, January 1994,

1. A meeting with a Director of Agency for Regional Development in Konin to discuss the following issues:
   - accommodation
   - new seminars

2. A meeting with a Director of Continuing Education Center to discuss the strategy for cooperating in the scope of writing curriculum for new seminars.

3. A meeting with representatives of the Department of Regional Development at the Local Authority to discuss future cooperation in organizing entrepreneurship seminars.

4. Sending out information about the Center which included and an offer about providing trainings and consulting services.

5. Making connections with Regional Labor Offices and sending offers about trainings.

6. A meeting with the representatives of Labor Offices to discuss a new way of cooperation in the field of developing and conducting trainings.

7. Conducting promotional campaign through Regional Department for Economic Development.

   The Center submited a proposal to work within a new project related to reconstruction of state-owned companies.

8. Performing promotional campaign during Businessmen Contest in Tennis. The Center sponsored the first award - free participation in a seminar presented by the Center. Information about the Center were distributed through:
   - sports clubs,
   - Konin radio station
   - local newspapers

9. Promoting a new seminar "A Partner for a Tradesman" through local radio station, local newspapers, leaflets in retail stores or sent through fax to selected companies.

10. The Center met representatives of Local Department for Economic Development and was asked to teach high school teachers with the specialty in economics. Directors of high schools are interested in training those teachers in teaching entrepreneurship. There is also a demand for academic textbooks on entrepreneurship.

11. The Center received an order from one of the Koło firm to conduct a semianar "A Partner for a Tradesman" for its employees.

12. January 15-16, a seminar "A Partner for a Tradesman" was presented for 10 wholesalers, employees of "*SEGEL*" company. It was led by Tomasz Żyminkowski.

FUTURE PLANS FOR THE CENTER:

1. January/February 1994, promoting 100-hour seminar "Small Business Certificate, of which the first edition received very good marks.

2. Preparing additional materials for Marketing module for a company which employees attended the seminar "Small Business Certificate".

3. February, a 2 day pilot seminar for teachers who are to start teaching entrepreneurship in high schools.

4. Preparing a seminar "A Start in Business" for a local Labor Office.

5. Organizing a training "Law and Business, a seminar "Investments and Stock Exchange" and a cruise for the participants to visit Helsinki.

6. Preparing a seminar "A Partner for a Tradesman" for managers specialized in selling in Konin.

Activity Report
A Satellite Center of the Polish-American Enterprise Institute in Poznań
Konin, March 1994

1. Between March 7-11, three teachers from the Center attended a seminar addressed to teachers from vocational education schools. The seminar was entitled "Training Self-Employment Skills as a Part of the Polish Vocational Education System".

2. March 15, the Center submitted a proposal to price a Seed Central - performed by Dr. H. Paszke.

3. March 16, the Director of PAEI, Dr. Zdzisław Krajewski and Dr. H. Paszke met representatives of KONIMPEX, Konin to develop strategy of future cooperation.

4. March 15, the Director of PAEI, Dr. Z Krajewski and Dr. H. Paszke met a manager of the Agency for Regional Development in Konin to discuss the opportunity to create new Employment Data Bank in Konin.

5. March 17, additional meeting to discuss the issue of Employment Data Bank.

6. March 18, a meeting with representatives of Peace Corps. to discuss the possibilities of cooperation.

7. March 22, at 11 a.m., PAEI organized a free seminar on a computer integrated system - SM BOSS. It attracted representatives of Konin companies as well as private businesses.

8. March 21, the Center received an approval of the order to price the Seed Central in Konin.

9. March 30, an agreement with the Seed Central was signed.

10. March 24, a meeting with a Director of the Marketing Division, Konin Radio. Two very important issues were discussed: 1/ promoting Marketing Management seminar through Konin Radio free of charge in return for participating in the seminar (by 2 persons from the radio station) and 2/ promoting Employment Data Bank through Konin Radio to help the unemployed to get more information.

11. Working on Employment Data Bank:
    - preparing new documents forms,
    - writing questionnaires etc.,

12. March 26-27, Marketing seminar attanded by the employees of KONIMPEX company.

Activity Report

A Satellite Center of the Polish-American Enterprise Institute in Poznań
Gorzów Wielkopolski, January 1994

1. The Center signed an agreement with West Economic Council.

2. Another agreement was signed to organized a seminar on standardization ISO 9000 in addition to the seminar "Mister Product".

3. The Center signed an agreement with the Local Agency for Economic Development to promote entrepreneurship in the region.

4. Making preparation for a weekend seminar for managers - to be accomplished in March-June 1994.

5. A short seminar was conducted for employees of the Furniture Center "*DOM*" in the scope of using *BOSS* computer program in managing a business.

Activity Report

A Satellite Center of the Polish-American Enterprise Institute in Poznań
Gorzów Wielkopolski, February 1994

1. February 19, participating in na exhibition "Mister Product" as a part of competition "Teraz Polska" (Poland Now).

2. February 26, conducting a seminar "Quality Management" for participants of the "Mister Product"competition.

3. Working on new seminars for entrepreneurs in tax policy, law and business management. The seminars will be complited with a trip to Helsinki.

Activity Report

A Satellite Center of the Polish-American Institute in Poznań
Gorzów Wielkopolski, March 1994

1. Participating in a meeting organized by the Agency for Regional Development in Gorzów Wlkp.

2. March 12-13, performing the first edition of the seminar "A Partner for a Tradesman".

3. March 18-20, conducting promotional campaign on the Center's activity while the Gorzów Consumption Fair *GOKOM'94*

4. March 22, Gorzów Center in cooperation with the Konin Center organized presentation of the SM BOSS Computer System used in business management.

5. Making preparation for new seminars "How to Sell Successfully? and "Marketing Management" for employees of AXX-Gobex company.

Activity Report

A Satellite Center of the Polish-American Enterprise Institute in Poznań
Gniezno, January 1994

Address: Bolesława Chrobrego str. 26
62 - 200 Gniezno, Poland
phone#: (66) 26-30-05

Managers: Michał Gejzer
Dariusz Łukasiewicz

1. Establishing the office.

2. January 25, the Center started to cooperate with Poznan Radio "S" to promote the program of PAEI.

3. January 29, the Center organized a session "Strategic Management and Recruiting Employees" at a Cultural Center for Youth in Gniezno. It was advertised in local newspapers "Przemiany Ziemi Gnieźnieńskiej" and "Głos Wielkopolski". The seminar attracted 15 persons - representatives of local authority, directors of state-owned companies as well as managers of small businesses. This event played a very important role in promoting the Center and its programs.

Urząd Miasta Leszno
Wydział Promocji
Rozwoju Gospodarczego

Leszno, 7 marca 1994

Pan
Stanisław Woźniczak
Polsko-Amerykański
Instytut Przedsiębiorczości
ul. Grota Roweckiego 4
64-100 Leszno

W nawiązaniu do naszego spotkania z 24 lutego br. serdecznie dziękujemy za miłe przyjęcie i wyrażenie chęci współpracy, którą zapoczątkowało spotkanie z pania dr Ashmore. Prosimy o przekazanie naszych podziękowań władzom Wyższej Szkoły Marketingu i Zarządzania, które reprezentował, na naszym pierwszym spotkaniu, pan Profesor Tadeusz Mendel.
Przesyłamy, w załączeniu, kserokopię Uchwały Rady Miejskiej dotyczącej utworzenia i zadań naszego wydziału.

Z poważaniem

NACZELNIK WYDZIAŁU
Promocji Rozwoju Gospodarczego
Alicja Szczepińska

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Gazeta I BIZNES

Nie tylko o normach ISO-9000

Z okazji konkursu Mister Produktu Województwa Gorzowskiego 26 lutego o godz. 10.00 w sali 11 w Urzędzie Wojewódzkim w Gorzowie odbędzie się seminarium gospodarcze.

Tematyka wykładów:

1. Gospodarcza współpraca przygraniczna w rozwoju inwestycji zagranicznych i eksportu (wykład przygotowany przez Państwową Agencję Inwestycji Zagranicznych).
2. Zarządzanie przez jakość w przedsiębiorstwach na rzecz eksportu.
3. Jak osiągnąć normy ISO-9000, aby uaktywnić się w eksporcie.

Problematykę związaną z wprowadzeniem norm ISO-9000 i zarządzaniem przez jakość przedstawi profesor Kindlarski, kierownik Katedry Jakości na Politechnice Warszawskiej.

Seminarium jest bezpłatne, a uczestnicy płacą jedynie za materiały, które zostaną opublikowane specjalnie z tej okazji. Seminarium organizuje Polsko-Amerykański Instytut Przedsiębiorczości, który zapewnia obsługę merytoryczną całej imprezy.

(pk)

W GORZOWIE

Gazeta Zachodnia, Gorzów
January 11,1994

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Not only about standards ISO-9000

On the occasion of the contest "Mister Product of Gorzów Voivodship", an economic seminar will take place on February 26, 1994 at 10 p.m. in the Gorzów Municipal Council:

Here are topics of the seminar:

1. Border economic cooperation and development of foreign investments and export (lecture prepared by National Agency for Foreign Investments).
2. Quality management and export development.
3. How to reach the standards of ISO-9000 to become active in export activity.

ISO-9000 standards and quality management will be presented by Prof. Kindlarski, the manager of Quality Division of Warsaw Polytechnic.

The seminar is organized by the Polish-American Enterprise Institute providing the merits of the event. The seminar is free except materials published especially for the ocassion.

GAZETA ZACHODNIA

ISO-9000

Polsko-Amerykański Instytut Przedsiębiorczości będzie współpracował z Zachodnią Izbą Gospodarczą w Gorzowie przy realizacji konkursu „Mister Produktu Województwa Gorzowskiego". Instytut zobowiązał się między innymi pokryć koszty organizacji seminarium na temat norm ISO-9000, które odbędzie się 26 lutego. (pk)

6 stycznia 1994

GAZETA ZACHODNIA, January 6, 1994

The Polish-American Enterprise Institute will cooperate with the West Economic Council in Gorzów Wielkopolski to implement a project "Mr Product of Gorzów Voivodship". The Institute offered covering the costs of organizing a seminar on standards ISO-9000 which would take place February 26, 1994.

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An article from the *Panorama Leszczyńska* March 1, 1994
- an interview with St. Woźniczak, the manager of the Leszno Satellite Center and Dr. John Turner, an American consultant

America - Poznań - Leszno

Leszno Satellite Center as a part of the Polish-American Enterprise Institute in Poznań has started its activities for 2 months. The Center is located at the College of Management and Marketing in Leszno.

- Everything is very young - summed up Stanisław Woźniczak, a manger of the Satellite Center - We have just started to learn ....

- The Polish-American Enterprise Institute in Poznań was established July 1, 1992. Its major goal was to promote and develop economic undertakings in the Wielkopolska region. The Institute has organized and delivered variety of services for so called small businesses. Its scope of activities includes: consulting services, trainings in the area of finance, market research, strategic planning, management etc. The Institute was established by the Center on Education and Training for Employment at the Ohio State University and funded by the U.S. Agency for International Development. The Economic Foundation NSZZ "Solidarność" is a Polish counterpart working within the project.

  The Leszno Satellite Center, despite its short history managed to arrange several interesting meetings with representatives of the faculty from foreign universities.

- So far, there were four meetings of this kind - said St. Woźniczek - but we plan to organize them regularly, two meetings a month. We hope to have an opportunity to arrange meetings with specialists from Germany and the U.S.A.

  Our first foreign guest was Donald Kopka Jr. from the Ohio State University, who attended our seminar "Mutual Expectations of American and Polish Businesses". The seminar attracted 35 persons, students from the College of Management and Marketing as well as students from a local High School specialized in teaching English. After that, we organized 3 day seminar conducted by dr Werner Goliasz from the Munich College of Business. That seminar attracted 20 students who learned about business negotiation, competition in trade and marketing strategies. In January we were fortunate to have with us dr John Turner from the Old Dominion University.

- St. Woźniczak: Our quests presented very broad professional knowledge which they shared with us openly.

Dr. John Turner was "examined" by teachers from the local High School who were interested in teaching business and developing personality of future managers. They asked him about the teachers' responsibilities in terms of teaching young people entering the new world of "big deals". The discussion was very fruitful. He did not beat about the bush what surprised the audience.

The Leszno Satellite Center is offering new trainings on economical effects of newly novelized tax regulations as well as is planning to prepare trainings for banks' employees.

Stany - Poznań - Leszno

Od dwóch miesięcy działa w Lesznie filia Polsko-Amerykańskiego Instytutu Przedsiębiorczości. Uruchomiono ją przy Wyższej Szkole Marketingu i Zarządzania, która zaistniała nieco wcześniej.

- Czyli: wszystko jest młode - podsumowuje Stanisław Woźniczak, kierownik filii. - Uczymy się dopiero...

Polsko-Amerykański Instytut Przedsiębiorczości, mający swoją siedzibę w Poznaniu, powstał 1 lipca 1992r. jako zrzeszenie specjalistów stawiające sobie za cel wspieranie i rozwój progospodarczych działań w Wielkopolsce. Organizuje szkolenia oraz prowadzi usługi konsultingowe dla tzw. małego biznesu, zajmując się m.in. doradztwem finansowym, badaniem efektywności przedsięwzięć, różnego typu analizami. Ze strony polskiej „zamieszana" jest w nim gdańska Fundacja Gospodarcza „Solidarność", zaś w St. Zjednoczone reprezentuje Center on Education and Training for Employment The Ohio State University. Całość sponsoruje U.S. Agency for International Development.

Leszczyński oddział - mimo tak krótkiego okresu istnienia - ma już za sobą realizację udanych inicjatyw. Zaliczyć do nich można chociażby spotkania z przedstawicielami zagranicznej kadry naukowej.

- Na razie były cztery - podlicza St. Woźniczak. - Planujemy, że podobne odbywać się będą systematycznie, dwa razy w miesiącu. Chodzi o fachowców z Niemiec i USA.

Pierwszym okazał się prof. Donald Kopka z Uniwersytetu Ohio, z którą to uczelnią instytut prowadzi stałą współpracę. W seminarium „wzajemne oczekiwanie amerykańskiego i polskiego biznesu" wzięło udział 35 osób, a przy okazji zorganizowano dyskusję ze studentami WSzMiZ oraz uczniami klas maturalnych o specjalności j. angielski. Wkrótce potem odbył się 3-dniowy kurs z udziałem dr Wernera Golasza, pracownika Wyższej Szkoły Biznesu z Monachium. Dwudziestu uczestników mogło zapoznać się ze sztuką negocjacji w biznesie, problemem konkurencji w handlu i strategiami marketingowymi. W połowie stycznia br. odwiedził placówkę prof. Johan Tuner z Uniwersytetu Wirginia...

Kierownik Woźniczak:

- Zaobserwowaliśmy, że goście - tak przynajmniej było do tej pory - dawkują wiedzę. Łatwo rozmawia się z nimi na tematy ogólne, ale ze szczegółami bywa gorzej. Po prostu nie chcą sprzedawać od razu swoich umiejętności, wolą je porcjować. I w gruncie rzeczy trudno się temu dziwić.

Prof. Tunera „egzaminowali" nauczyciele szkół średnich Leszna, chcący dowiedzieć się jak funkcjonuje za oceanem proces uczenia biznesu, kształtowania osobowości przyszłego menedżera. Inaczej - jakie zadania stoją przed pedagogami przygotowującymi młodego człowieka do wejścia w świat „wielkich interesów". Rozmawiano konkretnie, bez owijania w bawełnę. Okazało się, że profesor był znakomicie przygotowany i nie dał się zaskoczyć żadnym pytaniom. Wykazał przy tym większą otwartość niż jego poprzednicy.

W najbliższym czasie filia PAIP zaproponuje cykl szkoleń nt. ekonomicznych skutków nowelizacji ustawy podatkowej. Myśli się także o utworzeniu punktu przygotowującego do pracy kasjerów bankowych i walutowych.

RAFAŁ FRĄCKOWIAK

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THE LESZNO VOIVODSHIP

SOCIAL AND ECONOMICAL DESCRIPTION OF THE LESZNO PROVINCE

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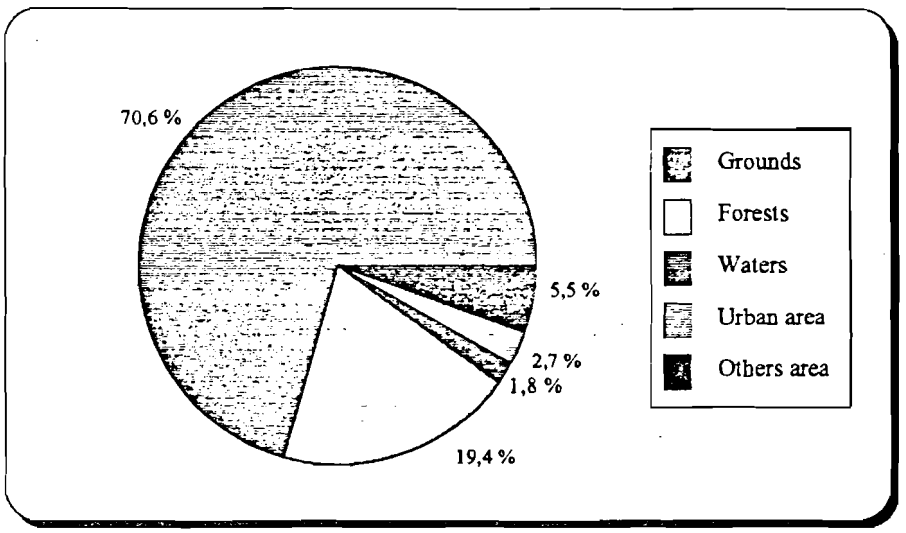
The economic and social description of the voivodship

The Leszno province is enclosed in three geographical regions; the Leszno Lake District, the South-Great Poland Lowlands and the Milicko-Glogow Depression. The province is situated in the river-basin of the Odra, its northern part belongs to the Obra basin and the southern part to the Barycza basin. The Leszno Lake District consists of numerous lakes - fifty in the province. The biggest is the Dominicko Lake, which covers the area of 363 ha. All genetic types of soil can be found in the province with the majority of mugwort, boggy and brown soil. In the structure of utilization of the area the biggest part is covered by farming fields (58%), forests (19.4%) and pasture land (12.5%).

STRUCTURE OF AREA



The main forest areas occur in the Slawsko Lake District (north-western part of the province) and in the Barycza valley. The pasture land extends from the Koscian Plain (the Obrzansko depression) to the Barycza valley and the Polish Trough depression. The eastern part of the province (the Leszno Upland) is devoid of large forest areas. The total annual rainfall is small and ranges from 450mm to 500mm. In the summer season agriculture suffers from scarcity of humidity.

The Leszno province is not abundant in raw material. Deposits of brown coal have been recorded on its territory (the so called Poznan Trough). Other deposits include earth gas, aluminium, loam and quartz sand. Conditions of the natural environment, especially the bio - climitical properties and landscape of the lake district and carefully maintained architecural monuments favor the development of tourism and recreation. The Leszno province is also a very interesting and attractive region characterized by picturesque scenery with numerous protected areas and

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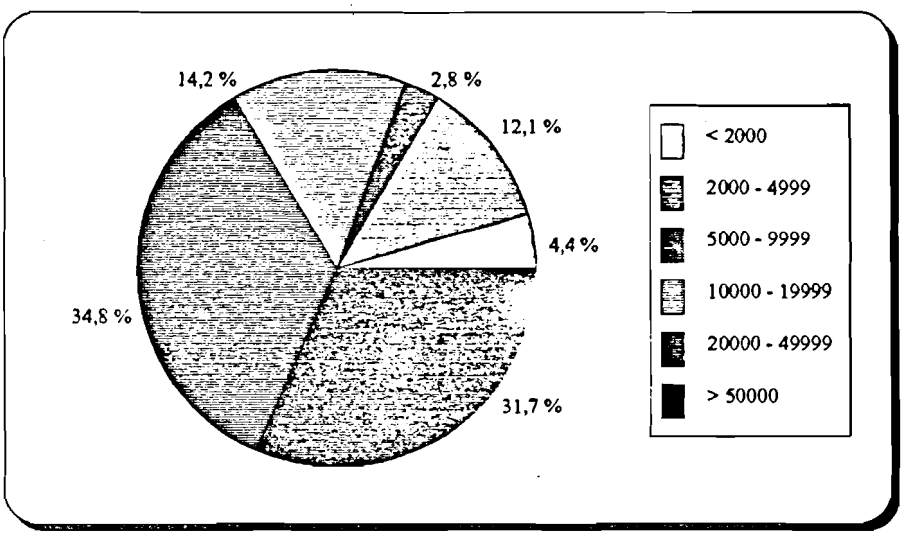
historical buildings. The most attractive regions include valleys and areas of the lake district among others the Przemet Landscape Park, the Osieczna region and the Barycza valley.

The Leszno province belongs to the Centro-Western Macroregion. In the north, it borders with the Poznan province, in the east with the Kalisz province, in the south with the Wroclaw province and in the west with the Legnica and Zielona Gora province. It is one of the smallest provinces in Poland in the respect of surface area as well as population. It covers the area of 4154 km2 which constitutes 1.3% of the country's total surface area and its population is 394.1 thousand which constitutes 1% of the country's total population. The province is divided into 32 territorial units. The urban population centred in 20 towns (13 towns below 5000 people) constitutes 48.5% of the province's population. Leszno is the largest town and it hasthe population of 60000 inhabitants, the second largest is Koscian - over 24000.

POPULATION IN CITIES



The rural population is centred in 825 villages and hamlets, 578 of which are administrative villages.

Leszno is an important railway and road junction and the whole province posseses a well developed network of roads and railway lines. The province is crossed by an important international highway E-261 running from the north of the country (Gdansk) to the south to the Czech border in Jakuszyce. Over 95% of the roads have hard or improved surfaces.

The main railway line is the electrified route from Poznan to Wroclaw through Leszno. The byways lead to Glogow, Zbaszyn, Jarocin and Ostrow Wielkopolski. The dense railway and road network facilitates industry as well as agriculture and tourism. In contrast to the well developed communication system the level of equipment in telecommunication infrastructure is not sufficient. The index number of telephone density is 7.8; in towns - 13.6 and in villages - 2.55. In the province there are eighty exchange offices with the capacity of 34000 NN. The exchange offices are busy in 90%.

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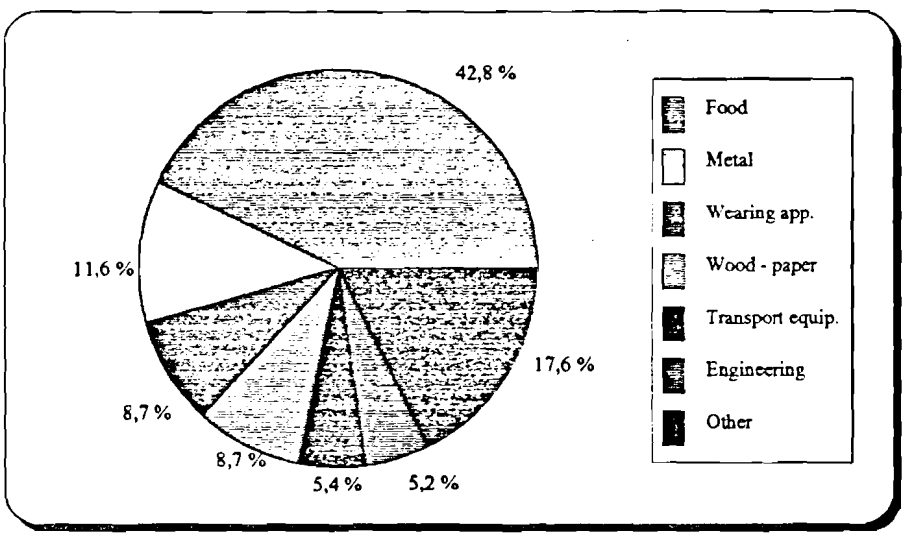
Economical issues

INDUSTRY

The Leszno province is included in the agricultural and industrial provinces. It consists of many small-scale industrial companies which employ approx. 30000 people - 70% in the private sector. The existing production factories are evenly spread over the whole province, however, their largest concentration occurs in Leszno, Koscian, Rawicz, Gostyn, and Wschowa.
The food industry is of the biggest importance (71.3 % of the entire income from sales and services and 42.8 % of the employees in industry). Sugar-mills, meat, spirit, dairy, cereal-mill, potato factories and fruit and vegetable processing plants dominate in the food industry. The good standing of the food industry is manifested by index numbers of the province's contribution to the country's production. The province supplies approx. 14% of potato starch, 13% of spirit, 7.2 % of sugar, 1.9 % of milk, 2.5 % of meat and 2.1 % of cereals.
Another important field of production is the metal and machinery industry which employs over 3520 people (16.9 % of the industry employees). Other important branches of industry are: textile and clothing industry - 2500 employees, wood and paper industry - 1900 employees and transport equipment industry - 1100 employees.

EMPLOYEES IN INDUSTRY



The following are the typical products of the Leszno industry: municipal facilities, building fittings, different types of pumps for liquid, devices for chicken hatching, technical gas, glass packaging for the food industry, components of the railway carriage equipment, and building material.
"METALPLAST-LOB" SA in Leszno and ZUCH "METALCHEM" SA in Koscian are the biggest production plants in the province. The other large companies include: Wielkopolska Huta Szkła in Gostyń (glass works), Zakłady Przemysłu Owocowo-Warzywnego in Pudliszki (fruit and vegetable processing plant), Zakłady Mięsne SA in Kościan (meat factory), Leszczyńska Fabryka Pomp Sp. z o.o. in Leszno (pump factory), Zakłady Urządzeń Gazow- niczych "GAZOMET" in Rawicz (gas machinery factory).

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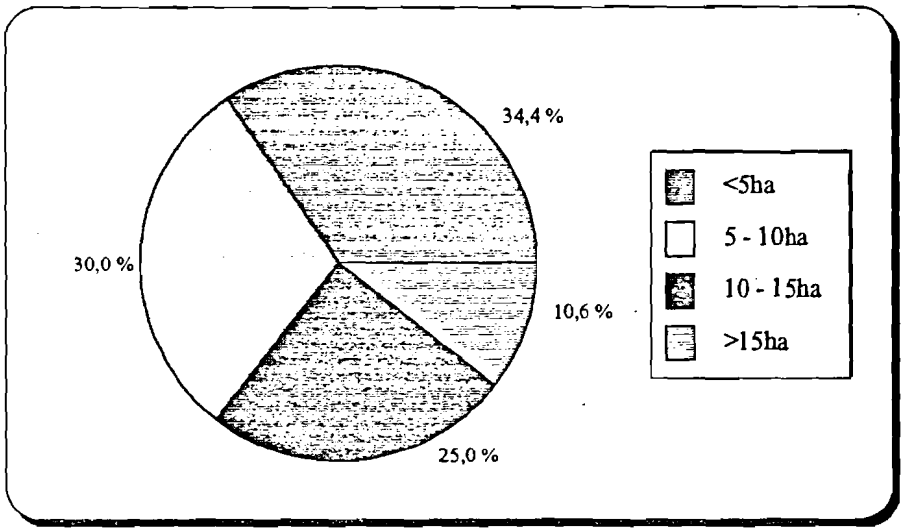
AGRICULTURE

Agriculture is the dominating and well developed branch of the province's economy. It employs approx. 62000 people including individual farmers.
High level of agriculture, a significant degree of production mechanization and high-product character of most farms place our region among the best in the country.
Good production results are achieved through intensive methods of cultivation and breeding of animals. In spite of fairly bad soil conditions and insufficient water proportion,the Leszno farmers supply more meat, milk and cereals (per hectare) than the country's average. Out of the total surfae area of the province 70 % is covered by farming land.
This index number places the province in the first ranks in the country. Most of the farming land (65.5 %) is owned by individual farmers - 20700 farms. The average surface area of those farm is small and is about 7 ha. Small farms (up to 5 ha) constitute the majority (34.4 %). Farms of 10-15 ha constitute 25.0 %.

STRUCTURE OF AREA INDIVIDUAL'S FARMS



Cereal cultivation (62.1 % of crop area) and industrial crops i.e. sugar-beet and cole dominate in plant production. Hog-raising and dairy cattle-breeding dominate in animal production. Pedigree animals and qualified sowing material from specialized factoriesare the two other significant fields.
If weather and agro-technical conditions are advantegous the average cereal harvests range from 42 dt/ha, potatoes - 210 dt/ha and sugar-beet - 400 dt/ha. It was only in 1992, when a long period of drought prevailed, that the harvests decreased by 30 to 50 %. For every 100 ha of farming land there are 246.3 heads of pigs and 53.4 heads of cattle (the country's average is respectively 98.5 heads and 40.0 heads). These numbers rank the province respectively as first and fourth in the country.
The agriculture is well equipped in machinery in comparison to the country as a whole. The proportion is one tractor per 12.4 ha farming land, whereas in the country it is 15.9 ha. Moreover 70 % (country - 35.8 %) of farming land is drained and 81.5 % farms (country - 53.6 %) are connected to water mains.

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The Leszno agriculture is characterized by a total lack of artificial irrigation which results in low harvests especially if there are periods of long droughts.

Social issues

HEALTH SERVICE AND PROTECTION OF THE ENVIRONMENT

Inadequate material and technical base of public utilities, especially in the sphere of health protection, places the province among the last in the country.
The health service base includes: 51 outpatients' surgeries, 31 health service centres, approx. 1800 beds in general hospitals. There are 45 beds per 10000 people compared with 57 beds in the country. The index numbers of employment of medical staff are also lower than the country's average. There are 13.8 doctors, 3.8 dentists and 43.6 nurses for every 10000 inhabitants. The new Leszno Province Hospital, which is in its last stage of construc- tion, should at least partially improve the situation in health service. It also has to be noticed that there is a rapidly growing number of private surgeries, clinics and policlynics. Most of them have good, specialized equipment and employ highly qualified staff.
In the last few years the epidemic situation (especially food poisoning) has been getting worse. It has also been noticed that more people suffer from tumour, circulation system diseases, thyroid, diabetes and tuberculosis. The condition of the environment has a great influence on people's health.

The Leszno province does not belong to regions of highly degraded natural environment. Nevertheless, insufficiently cleaned municipal sewage and industrial wastes have caused a highly advanced degradation of flowing water, which is contaminated with 13 million m3 of waste material per year. This has led to a situation in which most main rivers in the province are polluted and can only be classified as 3rd class of purity or do not conform to any standards.
None of the bigger industrial plants are equipped in devices reducing gas pollution. This situation together with gas pollution from other regions i.e. mainly the Legnica-Glogow Copper Region, have placed 18% of the forest surface area in the province under negative influence of gases and dust (south - western part of the province).
The result of this harmful emission is the degradation of soil, smaller crop yields, decrease in animal production effectiveness and increase in the number of circulation system diseases among people.
The following activities have been undertaken to protect the environment: construction of the purification plant, moderniza- tion of heating and technological systems, taking advantage of heating means causing less emission of polluting agents.

UNEMPLOYMENT AND WELFARE

The condition of many Polish families including those in the Leszno province has worsened over the past two years.

A rapidly increasing unemployment is one of the main social problems. At the end of 1993 there were 13.8 % unemployed. A large part of the unemployed are young people - 18-35 years old (69.0 % of the total number of the unemployed).

Considering the educational background, approx. 64% of the unemployed are high school and technical school graduates and only 30 % are elementary school graduates. Unfortunately the unemployed have great difficulties in finding work. Hardly 21% of the unemployed are without work for less than three months, 61.5 % haven't managed to find work for over six months; 36.9 % of them have stayed without work for over a year.

It is hard to specify the number of people who have lost the right to unemployment benefits and will have to turn to welfare. At present; observations indicate the alarming situation of growing unemployment and lack of any possibility of help.

In 1993, 97 milliard zlotys were spent on welfare. 25000 families took advantage of many different forms of financial help.

There are more and more families in need of financial help, even though both husband and wife work.

There are 32 welfare centres in the province; they have 155 employees, 91 of whom work in protective districts.

EDUCATION AND CULTURE

Leszno is the centre of the province's education and culture.Most of the secondary and higher education (21000 students) takes place in Leszno.

The Culture Centre of the Province, the Public Library, the Regional Museum, cultural associations and amateur groups are the leaders in spreading culture.

One has to emphasize the active role played by the T. Kurpinski Musical Association. There are more than 100 libraries (approx. 2 million volumes) in the province. The cultural movement and amateur movement is well dwveloped. The local folklore reveals its richness in the activity of many regional groups mainly from Bukowiec Gorny, Domachowo, Wloszakowice and Szymanowo. In many villages there are local artists - sculptors, embroidresses, straw and metal-work artists.

The province has approx. 5000 historical buildings (castles, palaces, churches, chapels, windmills and ols houses). The most prominent monuments are the castle in baroque style in Rydzyna, the hunter's palace in Wloszakowice, the group of palaces in Pawlowice. Historical manors are in Grabonog, Kopaszewo, Osowa Sien and Turwia.

The elementary schools are well developed; there are 215 schools with approx. 59000 students. There are also 13 high schools (5000 students).
There are 95 technical schools of almost all profiles of technical education. In agricultural education the following fields dominate: general agriculture, cultivation and animal - breeding, seed production and mechanization of agriculture.
The biggest schools in the province (over 1000 students) are the Zespół Szkół Zawodowych in Leszno, Kościan and Wschowa (technical schools) and Zespół Szkół Rolniczych in Nietążkowo.
The neighbouring cities (Poznan, Wroclaw, Zielona Gora) allow the students to continue their education at colleges and univerities e.g. the Poznan Polytechnic, the Wroclaw Polytechnic, the Adam Mickiewicz University in Poznan, medical and agricultural academies.

LESZNO PROVINCE

IN NUMBER

GENERAL DATA

Area (sq. kms.)	: 4154
Province borders	: To the north Poznan, to the south Wroclaw, to the east Kalisz, to the west Zielona Góra and Legnica
Population	: 394100 (1993)
- in cities	: 191100
Main cities	: Leszno (60168), Koscian (24392)

Vital statistics (per 1000 population)

- Live birth	: 15.7
- Deaths	: 10.1
- Natural increase	: 5.6
Internal migration (balance)	: - 0.2
Physicians	: 547
Hospital beds	: 1771

ECONOMIC INFORMATION

AGRICULTURAL PRODUCTION (10^3 tons.)

Cereals	: 381.8
- wheat	: 127.2
Potatoes	: 158.4
Sugar-beets	: 402.9
Rape	: 17.7

LIVESTOCK PRODUCTION (10^3 tons.)

Procurement of products of animal
(in live weight)

- cattle	: 13.9
- pigs	: 106.7
- other (poultry)	: 3.9
Milk	: 252.1 (10^6 l)

PRODUCTION OF PRODUCTS OF INDUSTRY

Mining production

- natural gas	: 1.8 (10^9 m^3)

Manufacturning industry (10^3 tons.)

Food industry (10^3 tons.)

- meat products	: 28.5
- butter	: 3.8
- sugar	: 106.8

Light industry (10^3)

- apparels	: 1320

Mineral industry (10^3)

- glass products	: 253000

COMUNICATIONS AND TRANSPORTATION

Road network (km.)

- main	: 517
- secondary	: 1907
Railroad network (km.)	: 352
- per 100 sq.kms.	: 8.5
Telephones	: 34635
Passenger cars per 1000 population	: 204

Source : GUS 1992

APPENDIX 3.0

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NEW SEMINARS

-Amerykański Instytut Przedsiębiorczości
:r: US Agency for International Development
wstańców Wlkp. 16, tel./fax 54-95-21
60-967 Poznań

THE TRAINING SEMINAR PROGRAMME

"Retail menagement"

Poznan, 16 - 17 th February 1994

Wednesday 16th February

9.00 - 9.15 A welcome and introduction to the seminar .
Dr Zdzislaw Krajewski

9.15 - 10.45 Basic problems of retail. - W.Wayne Talarzyk,
The Ohio State University.

10.45 - 11.15 Coffee break

11.15 - 12.00 Basic problems of retail. - W.Talarzyk - continue

12.00 - 14.15 A product and a strategy of assortment. Stock and its control. Prof. dr hab. Halina Szulce. AE Poznan.

14.15 - 15.15 Lunch

15.15 - 16.00 Customers' service strategy. - mgr Wieslaw Ciechomski.
AE Poznan.

Thursday 17th February

9.00 - 10.30 A strategy of promotion in retail. - mgr J. Mikolajczyk A

10.30 - 11.00 Coffee break

11.00 - 11.45 A strategy of promotion. - mgr J. Mikolajczyk. AE Poznan

11.45 - 14.00 Menagement accountancy and tax strategies in retail.
mgr Wachowski . AE Poznan.

14.00 - 15.00 Lunch

15.00 -15.45 Menagement accountancy and tax strategies in retail.
mgr K. Wachowski - continue.

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15.45 - 17.00 Responding to changes in retail. - W.W.Talarzyk.

The Ohio State University

DYREKTOR INSTYTUTU
dr Zdzisław Krajewski

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Lista uczestników seminarium

"Zarządzanie Handlem Detalicznym"

1.	Prof. W.Wayne Talarzyk	–	Ohio State University
2.	Magdalena Fiedorczyk	–	Białystok
3.	Teresa Bal	–	Rzeszów
4.	Krzysztof Mazur	–	Rzeszów
5.	Prof.dr hab. Halina Szulce	–	Poznań
6.	mgr Wiesław Ciechomski	–	Poznań
7.	mgr Jan Mikołajczyk	–	Poznań
8.	mgr Piotr Wachowski	–	Poznań
9.	dr Zdzisław Krajewski	–	Poznań

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Polish-American Enterprise Institute

RETAIL MANAGEMENT

SUCCESSFUL RETAILING

Content	Process
I. Merchandise strategies in retailing and their determinants	prof. W. Talarzyk
Section A (3 hours) - Model of retailing - Retailing myopia - Selling vs. marketing - Margin vs. turn operations - * Customer vs. product orientation	
Section B (3 hours) - Product, Assortment Strategy (Product life cycle)	Assortment strategy, line of product Product assortment and consumer satisfaction, Sale forecast - a practical example.
- Inventory and inventory control	Inventory, turnover inventory management strategy - cases, transparencies
Section C (2 hours) - Customer service strategy - Marketing Research - Motivating employees	Prof. W. Talarzyk

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II. Financial Retail Management (Managerial accounting and tax strategies)

Section A (2 hours)
- Pricing
- Markdowns

Factors influencing pricing strategy for different market segments - example
Pricing methods in retailing
- flexible pricing policy (markdowns)
- cases and transparencies

Section B (3 hours)
Managerial Accounting and its purpose

Overview

The purpose of this section is to help the participants to understand financial aspects of retailing and use them in their businesses.

Upon completion of this section participants will:
a) be familiar wit basic financial statements
c) be able to use different financial ratios to analyze their business condition
d) know to perform break-even analysis

Detailed Overview

In relation to financial documents the participants will analyze:

a) balance sheet
b) Income statements

In second part of the class financial ratios will be presented:
a) liquidity ratios
b) debt ratios
c) inventory turnover ratios
d) efficiency ratios

Graphical ratios presentation.

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The last part of the class will be devoted to the break-even analysis.	Graphical presentation.
<u>Section C</u> (3 hours) Tax strategy in retailing	
Overview	
The purpose of the section is to help the participants to understand tax system in relation to retailing.	
Upon completion of the section the partcipants will: 1) acquire basic knowledge on taxes 2) know what taxes apply to retailing 3) will learn basic tax forms	Participants will know: a) tax and fee b) functions of taxes c) tax principles
Second part will be devoted to the discussion on tax systems in retailing: 1) general rules 2) simplify rules	Transparencies Tax characteristics - function of taxes Tax calculation.
For general rules the following topics will be discussed: a) value added tax b) corporate income tax c) individual income tax d) lump sum turnover tax e) local tax f) treasury tax	Transparencies - value added tax - individual income tax rate
For the simplify rules, the corporate income tax will be presented.	Presentation tax documents and tax tax declaration.
The last part will be devoted to tax documentation and particularly: a) tax declaration b) monthly tax declaration c) annual tax settlement	

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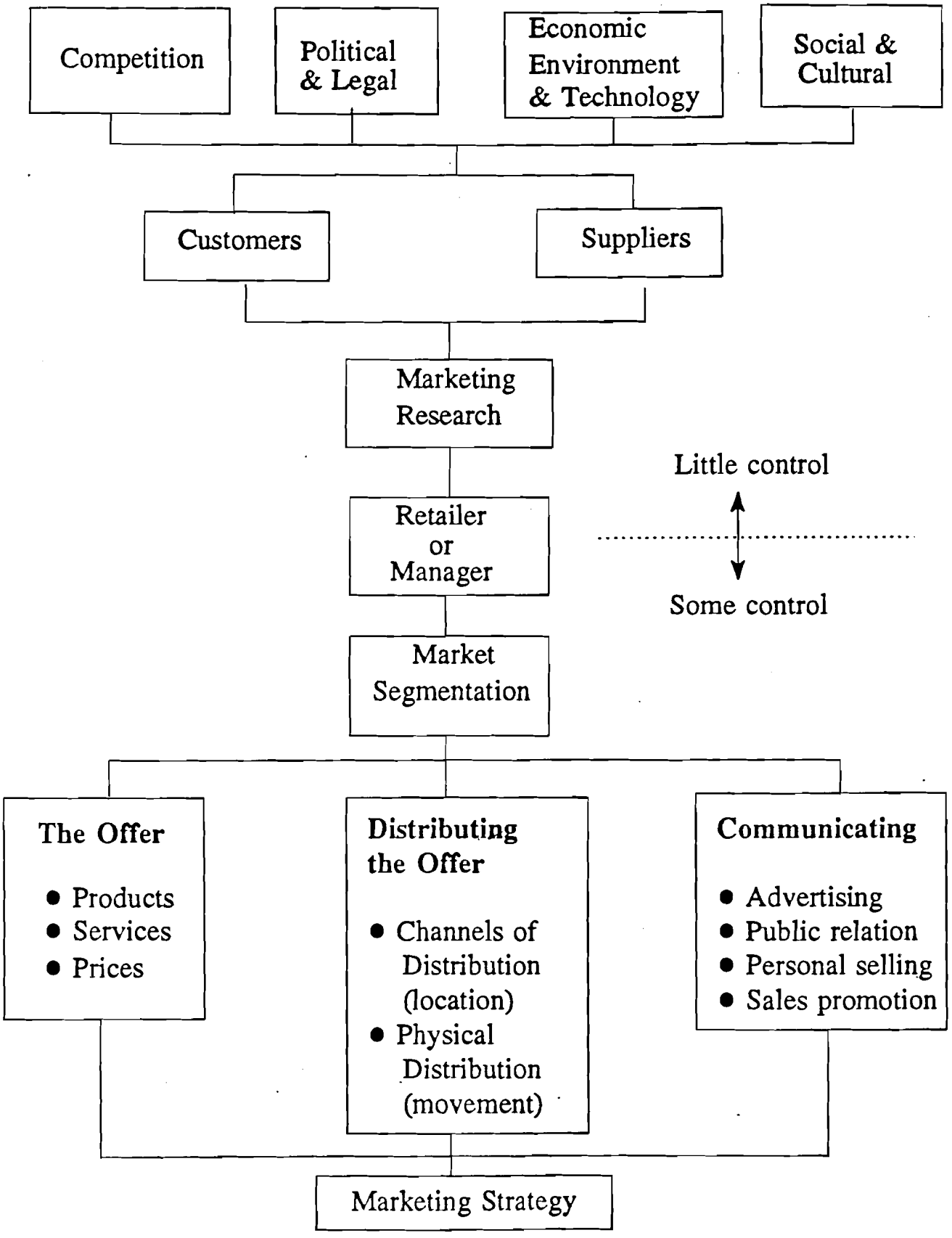
III. Promotion mix in retailing consumer behavior and services research	Transparencies, cases
Section A (4 hours)	
1. Promotion Strategy - Advertising - Personal selling - Sales promotion - Public relations	
2. Consumer behavior research	Transparencies and cases
Section B (3 hours)	Transparencies
- Promotion in retail shop - Store layout - Displays	

A Model of Retailing



PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 31 Sex: ☐ M ☒ F

Title/Topic of this course: RETAILING SEMINAR

Location: BIAŁYSTOK ENTR. INSTITUTE

Your Current Occupation: TEACHER

Your Occupational Goals: _____

Does your current job involve teaching others? ☒ Yes ☐ No

Does your current job involve supervising others? ☒ Yes ☐ No

Highest Level of Education: PhD of Economy

Field of Study _____

How did you hear of this program?

- ☐ Advertisement
- ☐ Friend
- ☐ Teacher/Professor
- ☐ Work
- ☐ Found out on my own
- ☐ Other _____

INSTRUCTIONS:

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Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beycnd my understanding.	4.	~~5~~	4	3 ?	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	~~5~~	4 ?	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4 ?	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued on back of page

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 22.02.94

Age: 26 Sex: [ ] M [X] F

Title/Topic of this course: RETAILING SEMINAR

Location: BIALYSTOK ENTR. INSTITUTE

Your Current Occupation: INSTRUCTOR

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: UNIVERSITY

Field of Study: LAW

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3 ?	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4 ?	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

BEST AVAILABLE DOCUMENT

Continued on back of page

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5.	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good.	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 28 Sex: [ ] M [x] F

Title/Topic of this course: RETAILING SEMINAR

Location: BIALYSTOK ENTR. INSTITUTE

Your Current Occupation: ASSISTANT IN INFORMATION CENTER

Your Occupational Goals: _____

Does your current job involve teaching others? [x] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [x] No

Highest Level of Education: ENGINEER

Field of Study _____

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [x] Work
- [ ] Found out on my own
- [ ] Other _____

BEST AVAILABLE DOCUMENT

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued on back of page

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5.	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company	12.	5	4	3	2	1
12.	I attended the program regularly	13.	5	4	3	2	1
13.	The project staff is very helpful	14.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	15.	5	4	3	2	1
15.	The overall program will have long lasting benefits	16.	5	4	3	2	1
16.	The overall program seems to be well organized	17.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	18.	5	4	3	2	1
18.	I have been able to establish valuable business contacts						

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 22. 02. 1994

Age: 28 Sex: [ ] M [X] F

Title/Topic of this course: RETAILING SEMINAR

Location: BIAŁYSTOK ENTR. INSTITUTE

Your Current Occupation:

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: UNIVERSITY EDUCATION

Field of Study: LAW

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

BEST AVAILABLE DOCUMENT

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11..	5	4	3	2	1

Continued on back of page

Continued from front page.

BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 94.02.22

Age: 30 Sex: [X] M [ ] F

Title/Topic of this course: RETAILING SEMINAR

Location: BIAŁYSTOK ENTR. INSTITUTE

Your Current Occupation: DYDAKTYCZNA I NAUKOWA

Your Occupational Goals: ROZWÓJ NAUKOWY

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: WYŻSZE

Field of Study: PSYCHOLOG

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

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INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4 ?	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued on back of page

Continued from front page.

BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5.	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

BEST AVAILABLE DOCUMENT

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: _____ Sex: ☐ M ☐ F

Title/Topic of this course: RETAILING SEMINAR

Location: BIAŁYSTOK ENTR. INSTITUTE

Your Current Occupation: Bielostocka Szkoła

Your Occupational Goals: Biznesu

Does your current job involve teaching others? ☒ Yes ☐ No

Does your current job involve supervising others? ☒ Yes ☐ No

Highest Level of Education: master

Field of Study: economist

How did you hear of this program?

- ☐ Advertisement
- ☐ Friend
- ☐ Teacher/Professor
- ☐ Work
- ☒ Found out on my own
- ☐ Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

POLSKO-AMERYKAŃSKI INSTYTUT
PRZEDSIĘBIORCZOŚCI
POLISH-AMERICAN
SMALL BUSINESS INSTITUTE
35-030 Rzeszów, ul.Zygmuntowska 2a, tel./fax;(0 17)328-58
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

SELLING SEMINAR SCHEDULE

FOR JOHN TURNER

RZESZOW – FEBRUARY 1994

F E B R U A R Y

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17 THURSDAY

8^{00}- 9^{00} - BREAKFAST
9^{00}-13^{00} - WORKING WITH POLISH COORDINATOR KRZYSZTOF KASZUBA ON FINAL VERSION OF THE CONTENT OF THE SEMINAR
13^{00}-15^{00} - LUNCH - POLONIA HOUSE
15^{00}-17^{00} - DISCUSSION - HOW TO ORGANIZE SELLING SEMINAR
19^{00}-20^{00} - DINNER

18 FRIDAY

8^{00}- 9^{00} - BREAKFAST
9^{00}-13^{00} - PARTICIPATING IN THE SELLING SEMINAR - CONDUCTED IN RZESZÓW INSTITUTE

T O P I C S

- THE ROLE OF PERSONAL SELLING IN MARKET ECONOMY.
- THE SALESPERSON: PRESENTING A POSITIVE SALE IMAGE.
- COMPANY, PRODUCT AND COMPETITION.
- CUSTOMER AND EFFECTIVE PRESENTATION.

13^{00}-15^{00} - LUNCH - POLONIA HOUSE
16^{00}-18^{00} - SELLING SHORT SEMINAR FOR STUDENTS - POST GRADUATE STUDY AT MARIA CURIE-SKŁODOWSKA UNIVERSITY.
18^{30}-19^{30} - DINNER

19 SATURDAY

8^{00}- 9^{00} - BREAKFAST
9^{00}-13^{00} - PANEL DISCUSSION IN RZESZOW INSTITUTE ON SELLING SEMINAR.
WORKING ON CHANGES TO THE SEMINAR.
13^{00}-14^{30} - LUNCH

Good bye
a trip to Warsaw, Poznań, Białystok.

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PRZEDSIĘBIORCZOŚCI
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PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

Selling seminar

Rzeszów, FEBRUARY 1994

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BEST AVAILABLE DOCUMENT

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POLISH-AMERICAN
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Selling seminar

Rzeszów, FEBRUARY 1994

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Rzeszów 1994

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Materiały opracowano w ramach projektu
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SPRZEDAŻ - ZARYS

Cele

Po tej części kursu uczestnik powinien:

A. Znać zawartość części teoretycznej kursu.

B. Rozumieć zasady konstrukcji części praktycznej kursu.

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A. CZĘSC TEORETYCZNA

T R E S C	Z A J Ę C I A
W CZĘSCI TEORETYCZNEJ KURSU DLA SPRZEDAWCÓW ZASTANÓWMY SIĘ WSPÓLNIE NAD WŁASNĄ DEFINICJĄ MARKETINGU ORAZ ROLĄ I MIEJSCEM SPRZEDAŻY OSOBISTEJ W GOSPODARCE RYNKOWEJ	
1. OKRESLENIE POJĘCIA MARKETINGU	
WSPÓLNIE Z UCZESTNIKAMI MUSIMY ZASTANOWIĆ SIĘ NAD DEFINICJĄ MARKETINGU, ZARZĄDZANIA MARKETINGOWEGO. SŁUCHACZE SAMI MUSZĄ ZAUWAŻYĆ RÓŻNICE POMIĘDZY TZW. MARKETINGIEM STATYCZNYM I DYNAMICZNYM ZORIETOWANYM NA PRODUKT I NA KLIENTA.	POKAŻ: F1-1 JAKA JEST TWOJA DEFINICJA MARKETINGU F1-2 ELEMENTY SKŁADOWE DZIAŁALNOSCI MARKETINGOWEJ F1-3 ZARZĄDZANIE MARKETINGIEM F1-4 STRATEGIA MARKETINGOWA F1-5 ORIENTACJA NA PRODUKCJĘ I NABYWCÓW /ZESTAWIENIE/
2. SPRZEDAŻ OSOBISTA JAKO ELEMENT ROZWOJU GOSPODARKI RYNKOWEJ	
W WARUNKACH GOSPODARKI RYNKOWEJ SPRZEDAWCA MUSI ZDECYDOWANIE KIEROWAĆ SIĘ WYMAGANIAMI RYNKU - KLIENTA. OZNACZA TO PRZYJĘCIE ZA NAJWAŻNIEJSZY PUNKT /ELEMENT/ DECYZJE KONSUMENTA, NABYWCY SPRZEDAWANYCH DÓBR I USŁUG. TO KUPUJĄCY DECYDUJE O SUKCESIE PRZEDSIĘBIORSTWA I O MOŻLIWOŚCIACH OSIĄGANIA ZYSKU.	

T R E S C	Z A J Ę C I A
PODEJSCIE RYNKOWE WYMAGA ODPOWIEDZI NA DWA PODSTAWOWE PYTANIA: I. JAKIE POTRZEBY ZGŁASZAJĄ KONSUMENCI NA RYNKU? II. JAK ZASPOKOIĆ TE POTRZEBY Z ZYSKIEM DLA SWOJEJ FIRMY?	POKAŻ: F2-1 GOSPODARKA RYNKOWA F2-2 ROLA KLIENTA W GOSPODARCE RYNKOWEJ - OMÓW ISTOTĘ GOSPODARKI RYNKOWEJ ORAZ ZNACZENIE POPYTU KONSUMPCYJNEGO F2-3 PODEJSCIE RYNKOWE
3. ANALIZA DECYZJI KUPUJĄCYCH ---------- I. RYNEK KONSUMENTA	
ANALIZA RYNKU PRODUKTU LUB USŁUGI WYMAGA POZNANIA RYNKU KONSUMENTA. RYNEK KONSUMENTA SKŁADA SIĘ Z KLIENTÓW KUPUJĄCYCH NA WŁASNE POTRZEBY, NA POTRZEBY GOSPODARSTW DOMOWYCH, FIRM, PRZEDSIĘBIORSTW - A NIE DLA OSIĄGNIĘCIA MATERIALNEGO ZYSKU.	POMÓŻ UCZESTNIKOM KURSU ZROZUMIEĆ DLACZEGO WAŻNE JEST POZNANIE RYNKU LOKALNEGO KONSUMENTA
KONSUMENCI KUPUJĄ PO TO TOWARY, ABY ZASPOKOIĆ WŁASNE, RODZINNE, SPOŁECZNE POTRZEBY I ZACHCIANKI. GDY KLIENCI KUPUJĄ JAKIŚ PRODUKT CZY USŁUGĘ ROBIĄ TO ZE WZGLĘDU NA TO, CZEGO OCZEKUJĄ PO TYM PRODUKCIE.	

T R E S C	Z A J Ę C I A
DO KUPOWANIA MOTYWUJĄ DWIE ZASADNICZE GRUPY PRZYCZYN: I. EMOCJONALNE ZADOWOLENIE Z WYGLĄDU OSOBISTEGO, POZYCJA TOWARZYSKA, AMBICJA, PRZYJEMNOSC, WZRASTAJĄCA DŁUGOSC CZASU WOLNEGO. II. RACJONALNE TRWAŁOSC, WYDAJNOSC, WYGODA, EKONOMICZNOSC, ZAUFANIE.	OMÓW: F3-1 CO ZACHĘCA LUDZI DO KUPOWANIA?
PSYCHOLODZY TWIERDZĄ, ŻE ZACHOWANIE KLIENTA JEST NAKIEROWANE ZA ZASPOKOJENIE OKRESLONYCH NA WSTĘPIE PODSTAWOWYCH POTRZEB. TE PODSTAWOWE POTRZEBY OBEJMUJĄ ŻYWNOSC, BYT, UBRANIE PODSTAWOWE. INDYWIDUALNE PRÓBY ZASPOKAJANIA POTRZEB SĄ ZWYKLE SPOWODOWANE BEZPOSREDNIO PRZEZ MOTYWY RACJONALNE. OSOBY O MAŁYCH ZASOBACH PIENIĘŻNYCH KUPUJĄ ZA SWOJE PINIĄDZE JAK NAJWIĘCEJ JESLI CHODZI O ILOSC I JAKOSC, TRWAŁOSC.	POMÓŻ UCZESTNIKOM ZROZUMIEC ZACHOWANIE KONSUMENTA I JAK TO WPŁYWA NA RYNEK. ZAPYTAJ: JAKIE POTRZEBY MUSZĄ BYC ZASPOKOJONE ABY KONSUMENT KUPIŁ TOWAR LUKSUSOWY? WYPISZ NA FOLII - NIECH KAŻDY PODA JEDEN POWÓD!
WIELU POLAKÓW ŻYJE CIĄGLE NA NISKIM POZIOMIE I ROBI WIELE ZAKUPÓW W CELU ZASPOKOJENIA PODSTAWOWYCH POTRZEB. ALE WIELU OSIĄGA WYŻSZY POZIOM ŻYCIA. WRAZ Z POPRAWĄ SYTUACJI GOSPODARCZEJ DOCHODY BĘDĄ ROSŁY - CZASEM WYSOKO PONAD MINIMUM, ZATEM BĘDZIE ROSŁA ROLA SIŁY NABYWCZEJ I DLATEGO ZAWÓD SPRZEDAWCY NABIERA WIELKIEGO ZNACZENIA.	JAKIE TOWARY LUB USŁUGI LUKSUSOWE NABYWAJĄ TERAZ POLACY? JAKIE GRUPY LUDZI KUPUJĄ TE TOWARY? DLACZEGO? F3-2 BADANIE ANKIETOWE PRZEPROWADZONE NA PRÓBIE LOSOWEJ 214 POLAKÓW

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T R E S C	Z A J Ę C I A
WIELE OSÓB NIE PRZYZNAJE SIĘ, ŻE KUPUJĄ TOWARY W CELU USATYSFAKCJONOWANIA SWOICH POTRZEB EMOCJONALNYCH.	
WIĘKSZOŚĆ PSYCHOLOGÓW UWAŻA, ŻE LUDZIE KUPUJĄ TOWARY W CELU EMOCJONALNEGO WYRÓŻNIENIA SIĘ OD INNYCH I CHĘCI DUMY Z WYGLĄDU OSOBISTEGO - MÓWIĄ O TYCH PRZYCZYNACH JAKO EMOCJONALNYCH. KLIENCI SKŁONNI SĄ UWAŻAĆ ZGOŁA INACZEJ.	
MOGĄ ONI SZUKAĆ JAKOŚCI LUB WARTOŚCI.W TAKIM UKŁADZIE MOŻNA POWIEDZIEĆ, ŻE WSZYSTKIE MOTYWY KUPOWANIA SĄ POPARTE LOGIKĄ. TYLE, ŻE PEWNE MOTYWY WYDAJĄ SIĘ BYĆ BARDZIEJ RACJONALNE, NIŻ INNE. PONIEWAŻ LUDZIE MYŚLĄ O SOBIE W KATEGORIACH RACJONALNYCH, WIĘC MAJĄ TENDENCJE DO WYRAŻANIA PRZYCZYN KUPOWANIA W LOGICZNY SPOSÓB.	POPROŚ UCZESTNIKÓW O OKREŚLENIE NAJCZĘSTSZYCH MOTYWÓW KUPOWANIA PRODUKTÓW LUB USŁUG, JAKIE SPRZEDAJĄ?
ABY SPRZEDAĆ LUB USŁUGĘ TRZEBA WIEDZIEĆ CO MOTYWUJE KONSUMENTA DO ZAKUPU.	
II. CZYNNIKI KSZTAŁTUJĄCE RYNEK KONSUMENTA	POPROŚ O ODPOWIEDŹ NA PONIŻSZE PYTANIE. WYPISZ NA FOLII ODPOWIEDZI. POKAŻ F3-3 CZYNNIKI KSZTAŁTUJĄCE RYNEK KONSUMENTA
RYNEK KONSUMENTA STALE SIĘ ZMIENIA. W OSTATNICH LATACH POJAWIŁO SIĘ WIELE NOWYCH CZYNNIKÓW KSZTAŁTUJĄCYCH TEN RYNEK. CZY POTRAFICIE WYMIENIĆ NIEKTÓRE Z NICH: 1. 2. 3.	

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T R E S C	Z A J Ę C I A
III. ANALIZA PRODUKTU /USŁUGI/	
NAJWAŻNIEJSZĄ OSOBĄ W PRZEDSIĘBIORSTWIE JEST KLIENT. MOŻNA WSPOLNIE Z UCZESTNIKAMI KURSU ZASTANOWIĆ SIĘ NAD TYM STWUERDZENIEM.	POKAŻ: F3-4 ZŁOTE ZASADY OBSŁUGI KLIENTA -10 PRZYKAZAŃ KLIENTA.
OKRESLAJĄC KLIENTA, TRZEBA SPRECYZOWAĆ DLACZEGO WASI KLIENCI BĘDĄ KUPOWAĆ U WAS.	
JESLI NIE BĘDĄ, NIE ZAROBICIE WYSTARCZAJĄCO DUŻO NA WŁASNE UTRZYMANIE.	
SPRZEDAWAĆ, ZNACZY DOWIEDZIEĆ SIĘ CZEGO CHCE KLIENT.	
WYMAGA TO TAK SAMO ANALIZY PRODUKTU JAK I ANALIZY KLIENTA.	
A N A L I Z A P R O D U K T U /U S Ł U G I/	
1. OPIS- OGOLNY OPIS PRODUKTU; NIE MOWI ON WIELE KLIENTOWI.	WYKORZYSTAJ: F3-5 ANALIZA PRODUKTU /USŁUGI/ ABY OMOWIĆ TEN ELEMENT
2. CECHY- SPECJALNY SPOSOB W JAKI ZAPROJEKTOWANO, WYKONANO; ROZMIAR, GATUNEK ITP.	
3. KORZYSCI- REALNE POWODY, DLA KTORYCH PRODUKT BĘDZIE NABYWANY; CECHA SATYSFAKCJONUJĄCA.	
4. ZASTOSOWANIE- Z JAKICH POZYCJI MOŻNA ANALIZOWAĆ ZASTOSOWANIE NASZEGO PRODUKTU CZY USŁUGI.	

T R E S C	Z A J Ę C I A
WYKAŻ, ŻE TEN TYP ANALIZY KAŻE MYŚLEĆ B.TWÓRCZO O PRZYCZYNACH DLA JAKICH KTOŚ MOŻE CHCIEĆ KUPOWAĆ U WAS.	ROZDAJ DO WYPEŁNIENIA: F3-6 ĆWICZENIE WYSZUKIWANIA CECH, ZALET, KORZYŚCI
IV. KOMPLEKS DECYZJI MARKETINGOWCA	
MARKETING POMAGA DOPROWADZIĆ DO KORZYSTNEJ WYMIANY DÓBR MIĘDZY PRODUCENTEM I KONSUMENTEM. ABY SPEŁNIŁ ON SWOJE ZADANIE TRZEBA ZBADAĆ 4 ELEMENTY: 1. PRODUKT 2. MIEJSCE 3. CENĘ 4. PROMOCJĘ ICH KOMBINACJA ZNANA JEST JAKO MIESZANKA MARKETINGOWA - MIX. WSZYSTKIE TE ELEMENTY SĄ NIEZBĘDNE W FUNKCJONOWANIU FIRMY, ONE PRZYNOSZĄ ZADOWOLONEGO KLIENTA I ZYSKI. TE CZYNNIKI MUSZĄ BYĆ STALE OBSERWOWANE I ANALIZOWANE. RAZ PRZEPROWADZONA ANALIZA, RAZ OPRACOWANA STRATEGIA MUSI BYĆ DOPRACOWYWANA. DANE O RYNKU ZEWNĘTRZNYM, O KLIENCIE MUSZĄ BYĆ STALE MODYFIKOWANE. TU WŁASNIE NALEŻY PODKREŚLIĆ ROLĘ SPRZEDAWCY, KTÓRY MA BEZPOŚREDNI KONTAKT Z ODBIORCĄ Z KUPUJĄCYM. SPRZEDAWCA POWINIEN BYĆ "CZUJNIKIEM" ZACHOWAŃ KLIENTA.	OMÓW ELEMENTY KONCEPCJI MARKETINGOWEJ: F4-1 ZESPÓŁ DECYZJI MARKETINGOWYCH. /POSTARAJ SIĘ PRZYBLIŻYĆ FUNKCJE KAŻDEGO Z ELEMENTÓW MARKETINGU MIX - MIESZANKI/
V. ZBIERANIE DANYCH MARKETINGOWYCH	
PIĘĆ PODSTAWOWYCH PYTAŃ STANOWI RAMY, WOKÓŁ KTÓRYCH GROMADZIĆ NALEŻY WIADOMOŚCI O RYNKU.	ROZDAJ I OMÓW F5-1 KTO? CO? KIEDY? GDZIE? DLACZEGO?

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B. CZĘSC PRAKTYCZNA

T R E S C	Z A J Ę C I A
1. WARUNKI OSIĄGNIĘCIA SUKCESU W ZAWODZIE SPRZEDAWCY	
ZACZNIJ OD PYTANIA: CO TO JEST SPRZEDAŻ?	
JEŚLI NA SALI SĄ SPRZEDAWCY UZYSKASZ JEDNĄ Z WIELU ODPOWIEDZI, ŻE TO STRASZNIE CIĘŻKA PRACA. MOŻESZ WIĘC ANALIZĘ CECH DOBREGO SPRZEDAWCY ROZPOCZĄĆ OD PRZYTOCZENIA SŁÓW FRANKA BETTGARA - SPRZEDAWCY ODNOSZĄCEGO SUKCESY: "SPRZEDAWANIE TO NAJLŻEJSZA PRACA POD SŁOŃCEM JEŚLI TYLKO NA NIĄ CIĘŻKO PRACUJEMY".	
DOKONAJ ANALIZY SPRZEDAWCY ODNOSZĄCEGO SUKCESY I ODNASZĄCEGO PORAŻKI.	POKAŻ FB-1 TERAZ SAM DOKONAJ WYBORU.
	NA ZAKOŃCZENIE TEGO TEMATU PRZECZYTAJ "DECYZJA RENATY"
ANALIZUJĄC "DECYZJĘ RENATY" - POZWÓL NIECH UCZESTNICY MÓWIĄ, WYRAŻAJĄ SWOJE OPINIE. TO ZEZWOLI CI Z GŁOWĄ SŁUCHACZY WYŁONIĆ PRAWDZIWYCH UTALENTOWANYCH SPRZEDAWCÓW I SPRZEDAWCÓW ROBIĄCYCH POZORY SPRZEDAŻY.	

T R E S C	Z A J Ę C I A
2. KORZYSCI Z SUKCESÓW W SPRZEDA- -WANIU	
	ROZDAJ TEST DO ANALIZY FB-2 KORZYSCI Z SUKCESÓW W SPRZEDAWANIU
POPROS O DOKONANIE WYBORU TRZECH NIEWŁASCIWYCH STWIERDZEŃ W ZAPROPONOWANYM TESCIE.	
ZAPYTAJ O PRZYCZYNY DOKONANIA TAKIEGO A NIE INNEGO WYBORU PRZEZ UCZESTNIKÓW KURSU.	
PO DOKONANIU ANALIZY KORZYSCI Z SUKCESÓW W SPRZEDAWANIU ZAPROPONUJ POSZUKANIE WSPÓLNIE KORZYSCI "PLUSÓW" Z NIUDANYCH TRANSAKCJI KUPNA - SPRZEDAŻY.	
DOKONAJ ANALIZY WRAZ ZE SŁUCHACZAMI	NA CZYSTEJ FOLII DOKONAJ ZAPISU POZYTYWNYCH STRON NIEUDANYCH TRANSAKCJI KUPNA I SPRZEDAŻY.
3. CECHY SPRZEDAWCÓW	
TĘ CZĘSC ZAJĘC MOŻNA ROZPOCZĄC PYTANIEM JAKI POWINIEN BYC SPRZEDAWCA: A. ZDOLNY DO ŁATWEGO NAWIĄZYWANIA ROZMOWY B. PEWNY SIEBIE C. PEŁEN SZACUNKU DLA KLIENTA D. OTWARTY NA NOWE SYTUACJE E. UCZCIWY F. ENTUZJASTYCZNY G. UŚMIECHNIĘTY H. CHĘTNY DO POMOCY	

T R E S C	Z A J Ę C I A
PO DOKONANIU TAKIEJ ANALIZY MOŻESZ ZAPROPONOWAĆ WYKONANIE TESTU, KTÓRY WYKAZUJE ROLĘ POZYTYWNEGO STOSUNKU DO ZAWODU SPRZEDAWCY ORAZ DO OTOCZENIA.	ROZDAJ TEST FB-4 TWÓJ STOSUNEK DO SPRZEDAWANIA.
NA ROZWIĄZANIE - PRZECZYTANIE TESTU MOŻNA UCZESTNIKOM ZAPROPONOWAĆ 10-15 MINUT.	
ABY DOPEŁNIĆ ANALIZY ZACHOWANIA DOBREGO SPRZEDAWCY ZAPROPONUJ KILKA UWAG DOTYCZĄCYCH ZAUFANIA DO SAMEGO SIEBIE.	
MOŻNA POPROSIĆ O WYSZUKANIE W SYTUACJACH /ŻYCIOWYCH/ SŁUCHACZY ZDAŻEŃ, KTÓRE PRZESĄDZIŁY O NABYCIU LUB REZYGNACJI Z ZAKUPU ZE WZGLĘDU NA NIEZDECYDOWANIE, NA NIEPEWNOŚĆ SPRZEDAWCY.	ROZDAJ FB-5 SKALA ZAUFANIA DO SIEBIE.
NALEŻY ROZDANY TEST OMÓWIĆ I PRZECZYTAĆ SŁUCHACZOM - MOŻNA IM DAĆ 10-15 MINUT NA WYPEŁNIENIE.	
4. RADY DLA DOBREGO SPRZEDAWCY	PATRZ PORADNIK DOBREGO SPRZEDAWCY.

T R E S C	Z A J Ę C I A
W KONTYNUACJI TAKICH BADAŃ NAJISTOTNIEJSZĄ ROLĘ ODGRYWA DOBRY SPRZEDAWCA. TO ON MA BEZPOŚREDNI KONTAKT Z KLIENTEM, TO ON PRZEZ OBSERWACJĘ, ANALIZĘ, POPRZEZ WYWIAD I SZEREG INNYCH WYRAFINOWANYCH BADAŃ MARKETINGOWYCH MA SZANSĘ NAJWCZEŚNIEJ ZANOTOWAĆ, ODEBRAĆ SYMPTOMY ZMIAN UPODOBAŃ, GUSTÓW, ZAINTERESOWAŃ KLIENTA.	
ĆWICZENIE: WYKORZYSTUJĄC F5-1 DO ANALIZY WASZEGO PRODUKTU LUB USŁUGI W RAMACH OPRACOWANIA WASZYCH POMYSŁÓW, BADANIA WASZYCH PRODUKTÓW. ZBIERZCIE TYLE DANYCH, ILE ZDOŁACIE NA NASTĘPNYM SPOTKANIU PODZIELIMY SIĘ NA GRUPY I OMÓWIMY WASZE INDYWIDUALNE SPOSTRZEŻENIA, DOŚWIADCZENIA.	

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I SPRZEDAŻ W GOSPODARCE RYNKOWEJ

Cele

Po tej części kursu uczestnik powinien:

1. Rozumieć co to jest marketing.
2. Rozumieć jaka jest rola sprzedaży osobistej w gospodarce rynkowej.
3. Określić swoje oczekiwania związane z kursem.

INSTYTUT PRZEDSIĘBIORCZOSCI

Sprzedaż

Część I

Tytuł: Sprzedaż w gospodarce rynkowej.

Zadanie: Przedstawienie roli sprzedaży w gospodarce rynkowej.

Cele: Uczestnictwo w tej części kursu sprawi, że uczestnik będzie:

- rozumiał co to jest marketing,
- rozumiał jakie są elementy składowe działalności marketingowej,
- rozumiał na czym polega zarządzanie marketingiem,
- rozumiał istotę strategii marketingowej,
- rozumiał rolę sprzedaży w gospodarce rynkowej,
- miał ustalony pogląd na to czego może się spodziewać po ukończeniu kursu.

Materiały:

Foliogramy

Folia 1.1: Jaka jest Twoja definicja marketingu.

Folia 1.2: Elementy składowe działalności marketingowej.

Folia 1.3: Zarządzanie marketingiem.

Folia 1.4: Strategia marketingowa.

Folia 1.5: Orientacje na produkcję i nabywców (zestawienie).

Folia 2.1: Gospodarka rynkowa.

Folia 2.2: Rola klienta w gospodarce rynkowej.

Folia 2.3: Podejście rynkowe.

JAKA JEST TWOJA DEFINICJA MARKETINGU?

"MARKETING JEST PROCESEM PLANOWANIA I WPROWADZANIA W ŻYCIE TWORZĄCYCH SIĘ POMYSŁÓW WYCENIANIA, PROMOWANIA, DYSTRYBUCJI DÓBR I USŁUG W CELU STWARZANIA TRANSAKCJI, KTÓRE ZASPAKAJAJĄ CELE KUPUJĄCYCH I CELE ORGANIZACJI.

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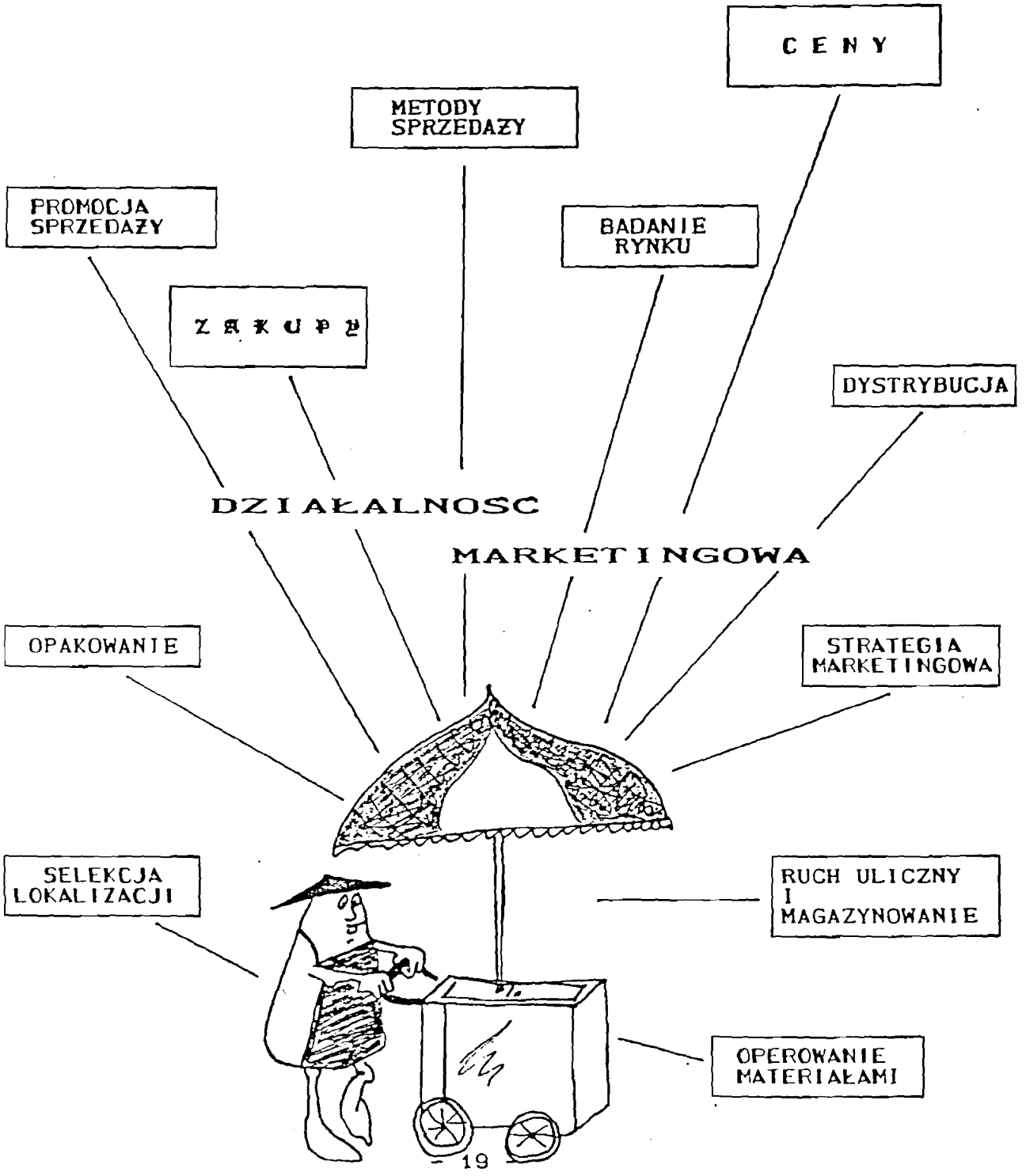

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ZARZĄDZANIE MARKETINGOWE

PROCES BADANIA OTOCZENIA,

ANALIZOWANIA MOŻLIWOŚCI RYNKOWYCH,

PROJEKTOWANIA STRATEGII MARKETINGOWYCH I NASTĘPNIE

EFEKTYWNEGO WPROWADZANIA W ŻYCIE

I KONTROLOWANIE PROCEDUR MARKETINGOWYCH.

STRATEGIA MARKETINGOWA

WYBOR CELOW, RODZAJU POLITYKI, ZASAD, KTORE W OKRESLONYM CZASIE NADAJĄ KIERUNEK MARKE-TINGOWY DZIAŁANIOM FIRMY, WYZNA-CZAJĄ KOMBINACJĘ I ALO-KACJĘ SRODKOW W ZALEŻNOSCI OD ZMIENIAJĄCEJ SIĘ SYTUACJI RYN-KOWEJ (WARUNKOW OTOCZENIA I KONKURENCJI).

ORIENTACJA na produkcje i nabywców

ZESTAWIENIE

PRODUKTY | SPRZEDAŻ I PROMOCJA | ZYSKI W WYNIKU OSIĄGNIĘCIA OKREŚLONEGO POZIOMU ZBYTU

→ Orientacja na PRODUKCJĘ /marketing tradycyjny/

W CENTRUM UWAGI FIRMY ZNAJDUJĄ SIĘ ↑ ↓

ŚRODKI REALIZACJI CELÓW MARKETINGOWYCH ↑ ↓

SPODZIEWANE KORZYŚCI DLA FIRMY ↑ ↓

POTRZEBY NABYWCÓW | ZINTEGROWANE ŚRODKI MARKETINGU | ZYSKI W WYNIKU ZASPOKOJENIA POTRZEB NABYWCÓW

→ Orientacja na NABYWCÓW /marketing dynamiczny/

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G O S P O D A R K A

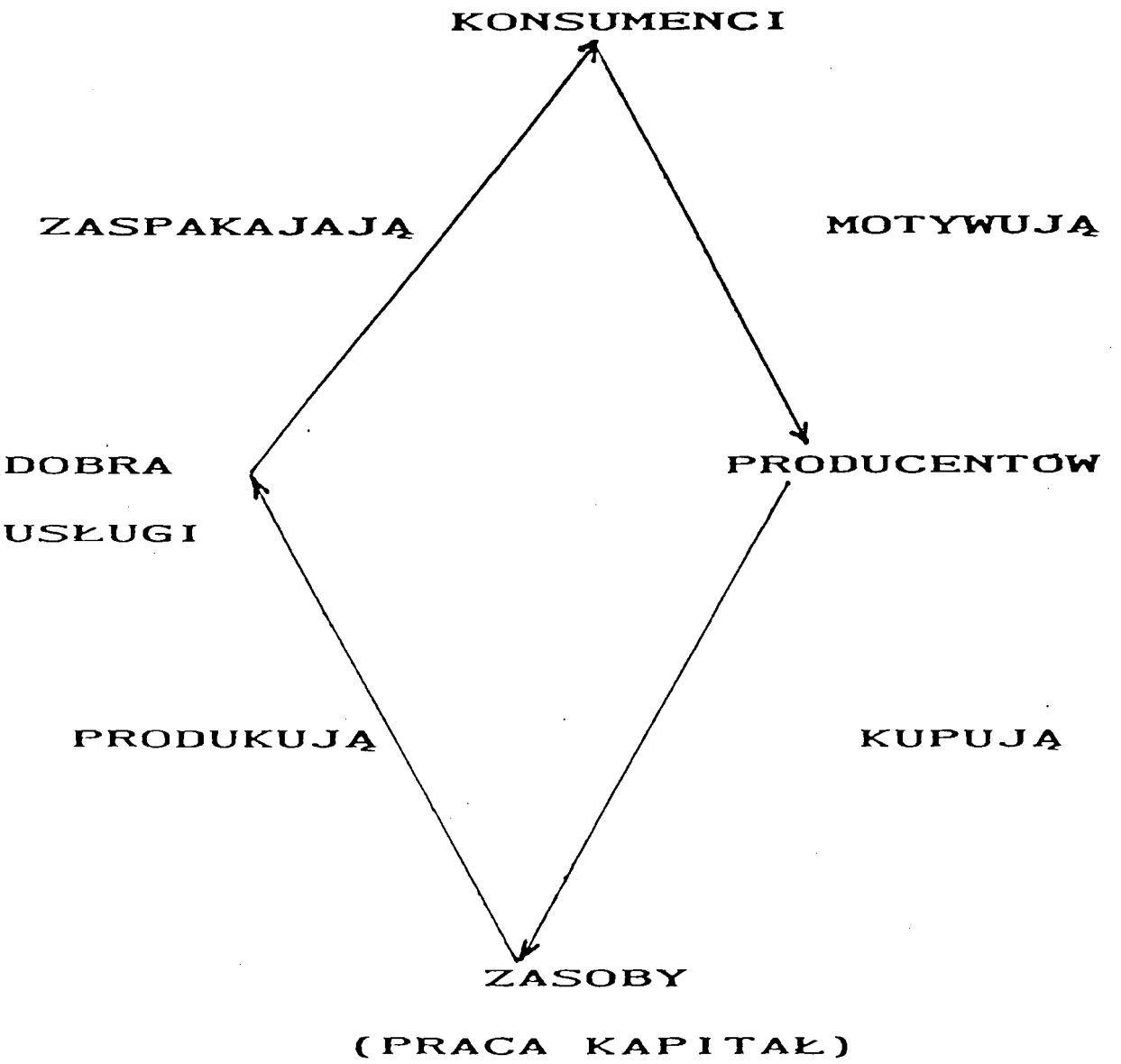
R Y N K O W A

OZNACZA,

ŻE DECYZJE PRZEDSIĘBIORCY

WYZNACZONE SĄ PRZEZ KONSUMENTA

NA RYNKU


KONSUMENCI
ZASPAKAJAJĄ
MOTYWUJĄ
DOBRA
USŁUGI
PRODUCENTÓW
PRODUKUJĄ
KUPUJĄ
ZASOBY
(PRACA KAPITAŁ)

P O D E J Ś C I E
R Y N K O W E

1. JAKIE POTRZEBY ZGŁASZAJĄ KONSUMENCI NA RYNKU?

2. JAK ZASPOKOIĆ TE POTRZEBY Z ZYSKIEM DLA SIEBIE?

II ANALIZA DECYZJI KUPUJĄCYCH

Cele

Po tej części kursu uczestnik powinien:

1. Rozumieć na czym polega rynek konsumenta.
2. Poznać czynniki kształtujące rynek konsumenta.
3. Umieć przeprowadzić analizę produktu (usługi).
4. Rozumieć na czym polega kompleks decyzji marketingowych.
5. Znać sposoby zbierania danych marketingowych.

INSTYTUT PRZEDSIĘBIORCZOŚCI

Sprzedaż

Część II

Tytuł: Analiza decyzji kupujących.

Zadanie: Ta część kursu ma zaznajomić słuchaczy z różnymi aspektami określającymi decyzje podejmowane przez konsumentów na rynku.

Cele: Uczestnictwo w tej części kursu sprawi, że uczestnik będzie:

- rozumiał na czym polega rynek konsumenta,
- znał czynniki kształtujące rynek konsumenta,
- umiał przeprowadzić analizę produktu (usługi),
- rozumiał na czym polega kompleks decyzji marketingowych,
- znał sposoby zbierania danych marketingowych.

Materiały:

Foliogramy

Folia 3.1: Co zachęca ludzi do kupowania.

Folia 3.2: Badanie ankietowe.

Folia 3.3: Czynniki kształtujące rynek konsumenta.

Folia 3.4: Złote zasady obsługi klienta - 10 przykazań klienta.

Folia 3.5: Analiza produktu (usługi).

Folia 3.6: Ćwiczenie do wypełnienia. Wyszukiwanie cech , zalet , korzyści.

Folia 4.1: Zespół decyzji marketingowych.

Folia 5.1: Pięć podstawowych pytań o rynku.

CO ZACHĘCA LUDZI DO KUPOWANIA?

1. PRZYCZYNY EMOCJONALNE

* zadowolenie z wyglądu oso-
  -bistego
* pozycja społeczna
* ambicja
* zamiłowanie do czystości
* przyjemność
* dużo wolnego czasu

2. POTRZEBY RACJONALNE

* trwałość
* ekonomiczność
* poręczność
* wydajność
* zaufanie

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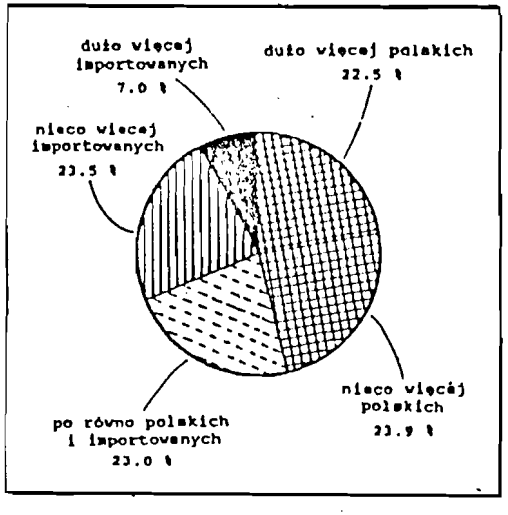
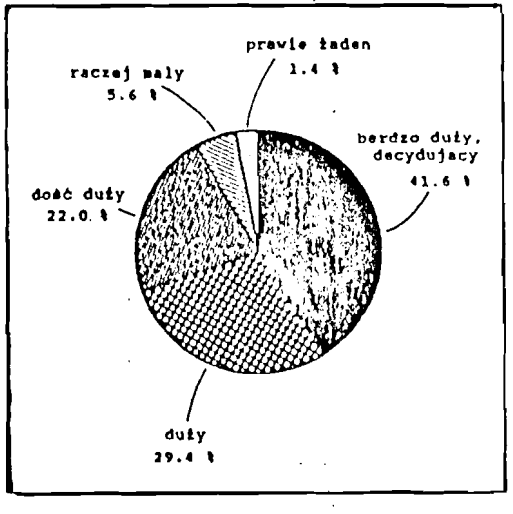
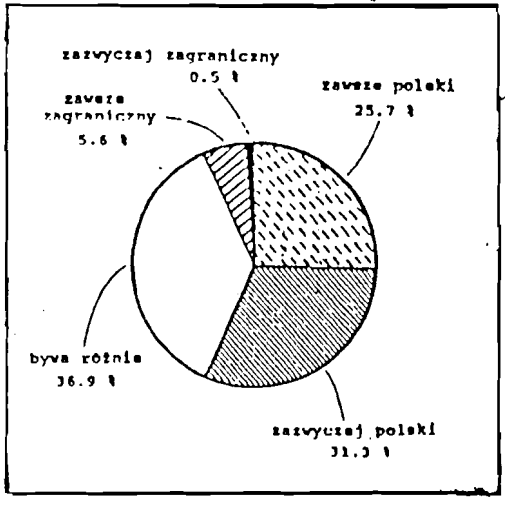
Jakich produktów spożywczych jest więcej w sklepach, w których zazwyczaj dokonuje pani zakupów?



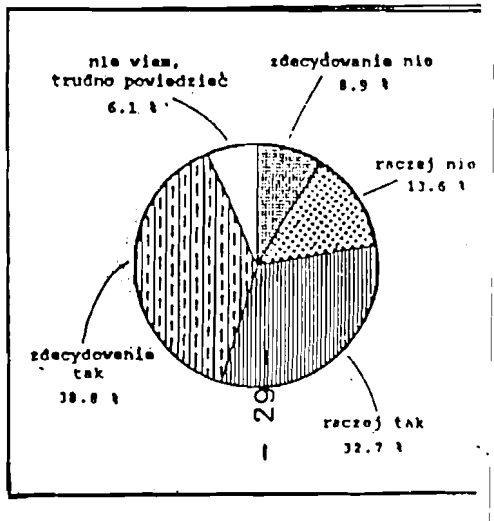
Jaki wpływ na decyzję zakupu żywności ma dla pani niska cena?



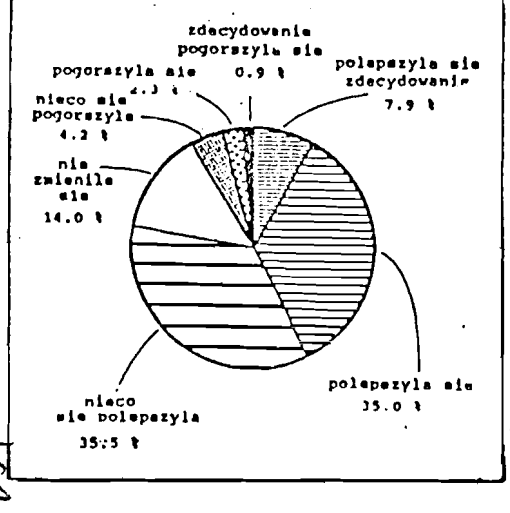
Jeśli zdarzy się, że może pani wybierać pomiędzy produktem polskim i importowanym (o podobnej cenie, jakości i opakowaniu), to kupuje pani:



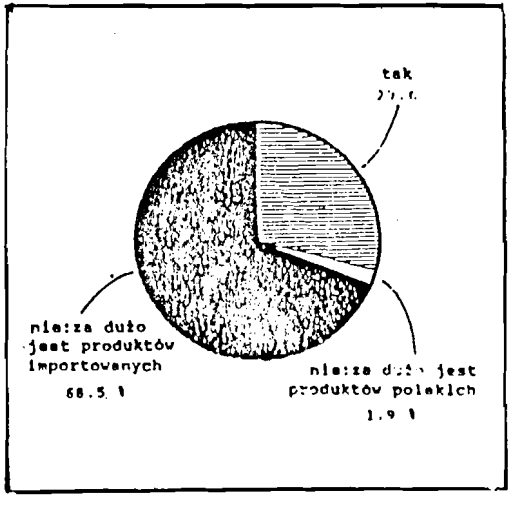
Czy uważa pani, że należałoby wprowadzić ustawowy nakaz, aby każdy sklep spożywczy sprzedawał podstawowe produkty (chleb, mleko itp.) po urzędowo ustalanych niskich cenach?



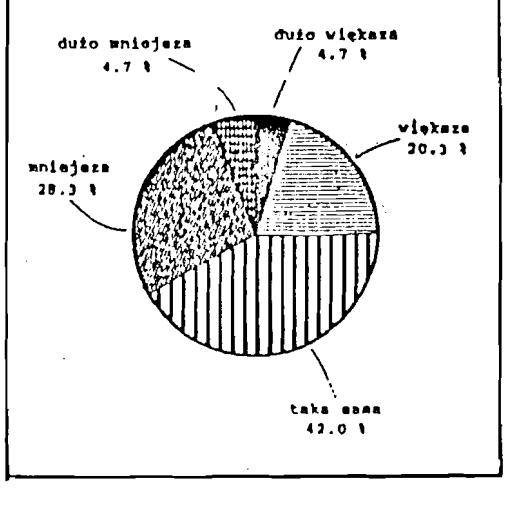
Czy, pani zdaniem, w ciągu ostatnich dwóch lat jakość polskiej żywności



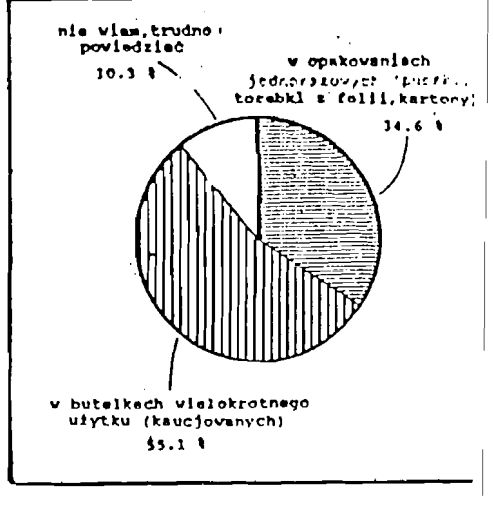
Czy uważa pani, że proporcja polskich i importowanych towarów jest w naszych sklepach właściwa?



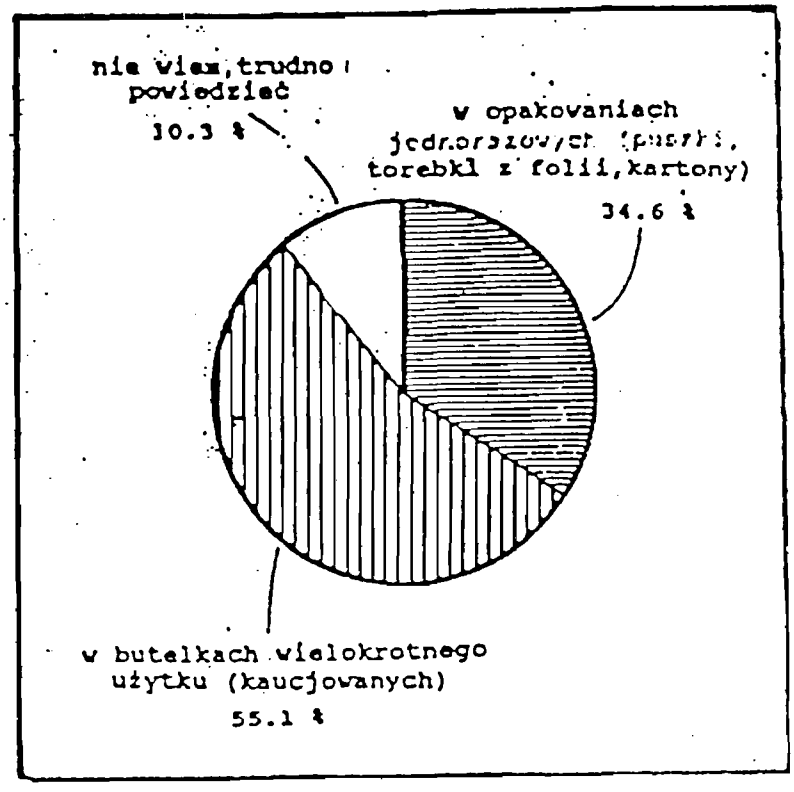
Czy, pani zdaniem, w ciągu najbliższego roku, dostępność polskiej żywności w naszych sklepach będzie:



Czy kupując napoje (mleko, piwo, soki, lemoniadę) woli je pani kupować:



Czy kupując napoje (mleko, piwo, soki, lemoniadę) woli je pani kupować:



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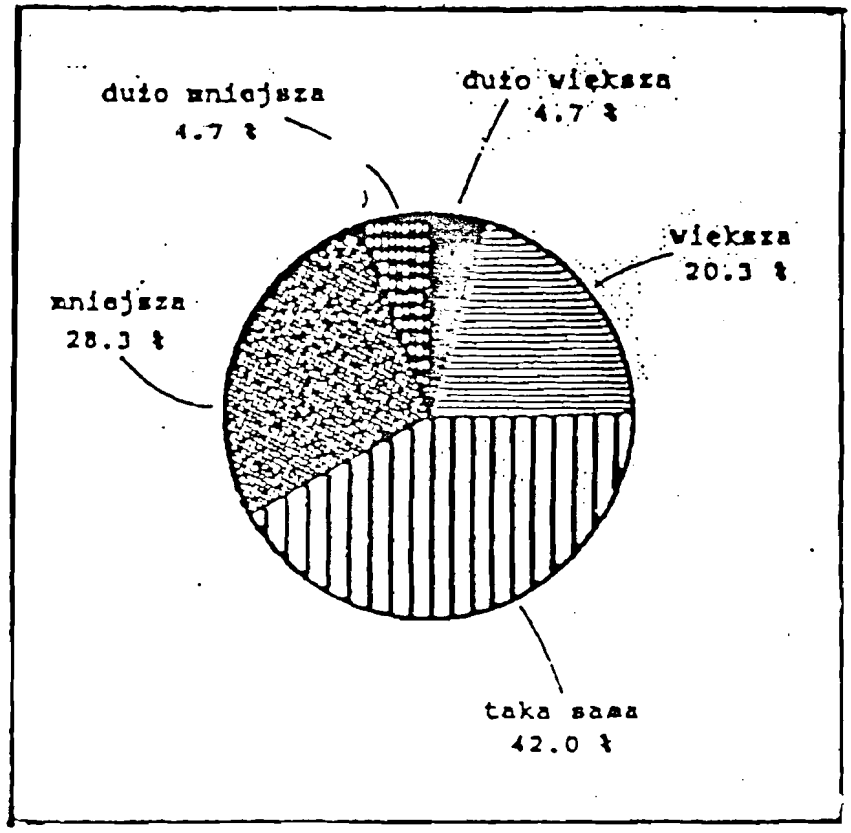
dostępność polskiej żywności w naszych sklepach będzie:



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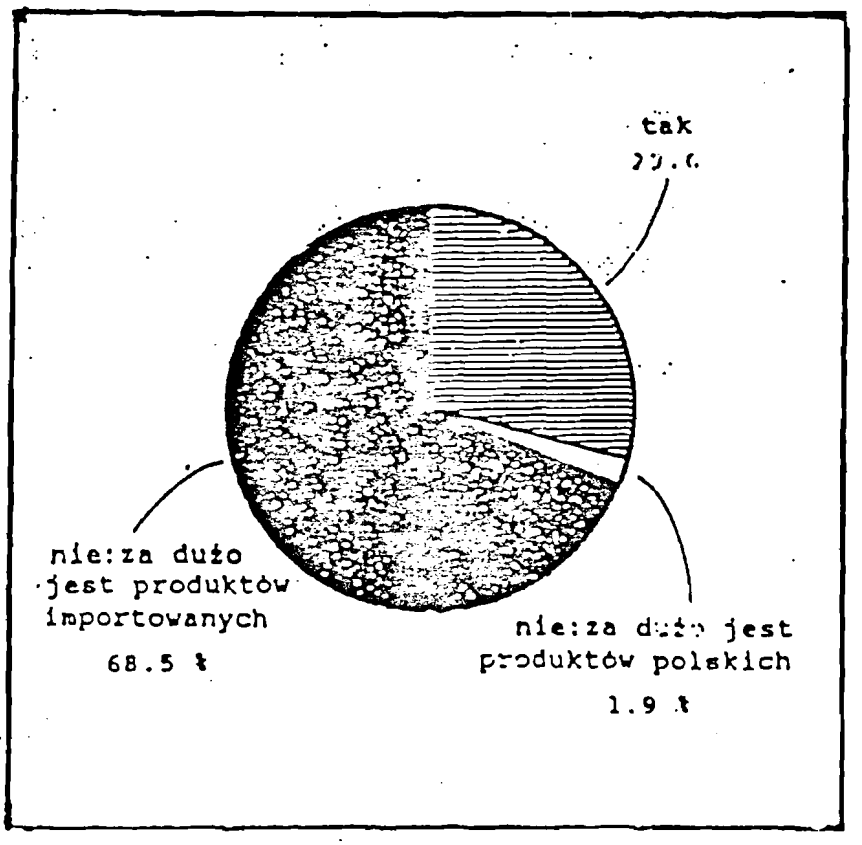
Czy uważa pani, że proporcja polskich i importowanych towarów jest w naszych sklepach właściwa?



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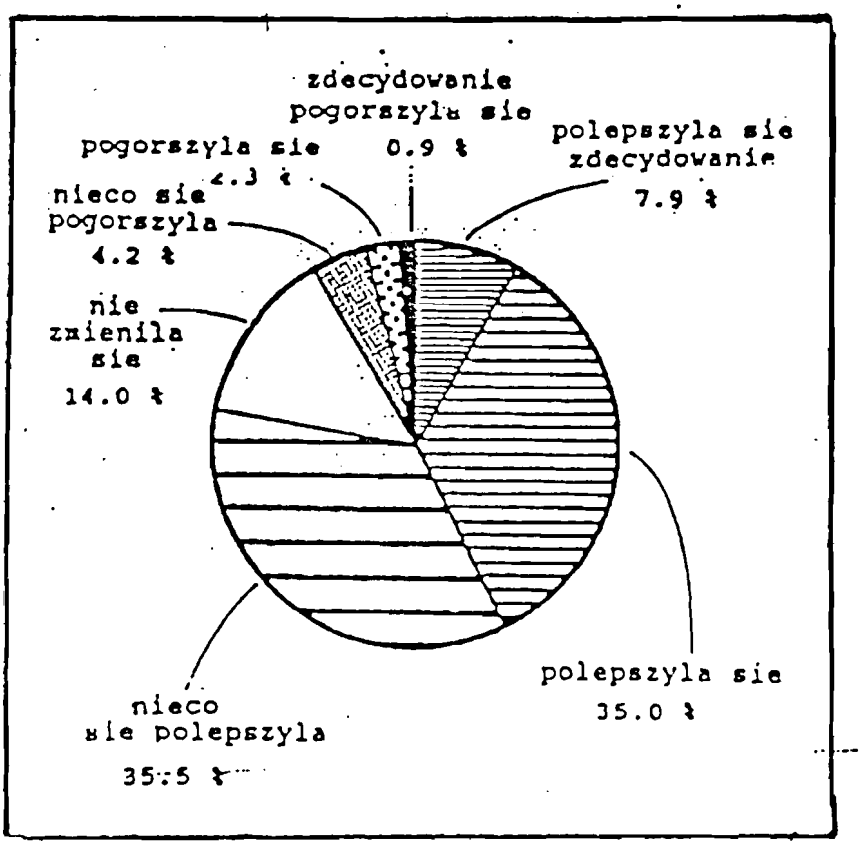
Czy, pani zdaniem, w ciągu ostatnich dwóch lat jakość polskiej żywności



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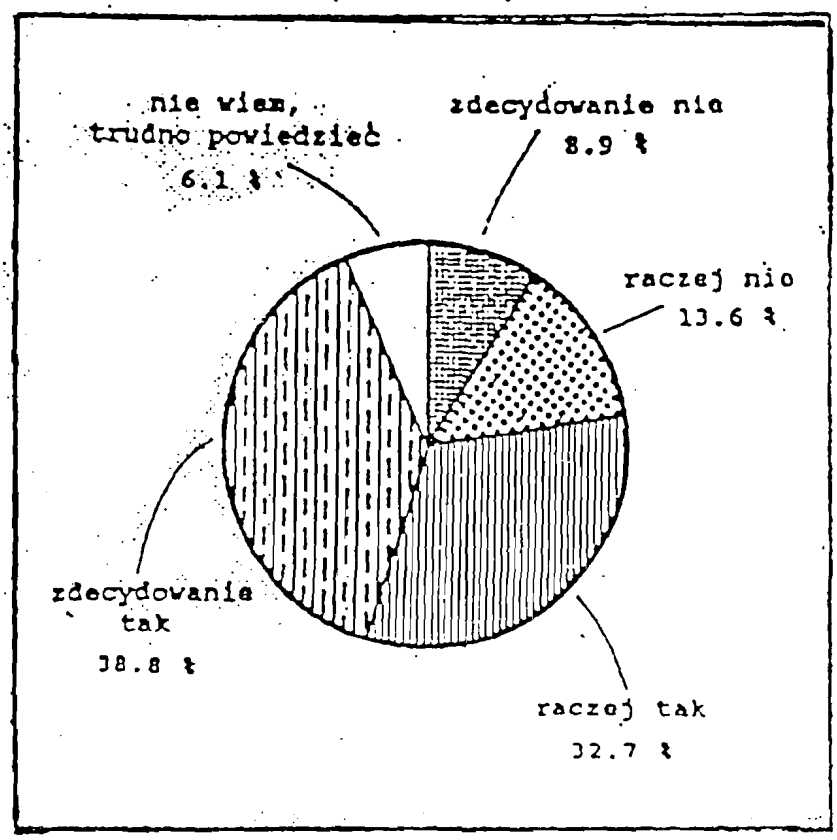
Czy uważa pani, że należałoby wprowadzić ustawowy nakaz, aby każdy sklep spożywczy sprzedawał podstawowe produkty (chleb, mleko itp.) po urzędowo ustalanych niskich cenach?



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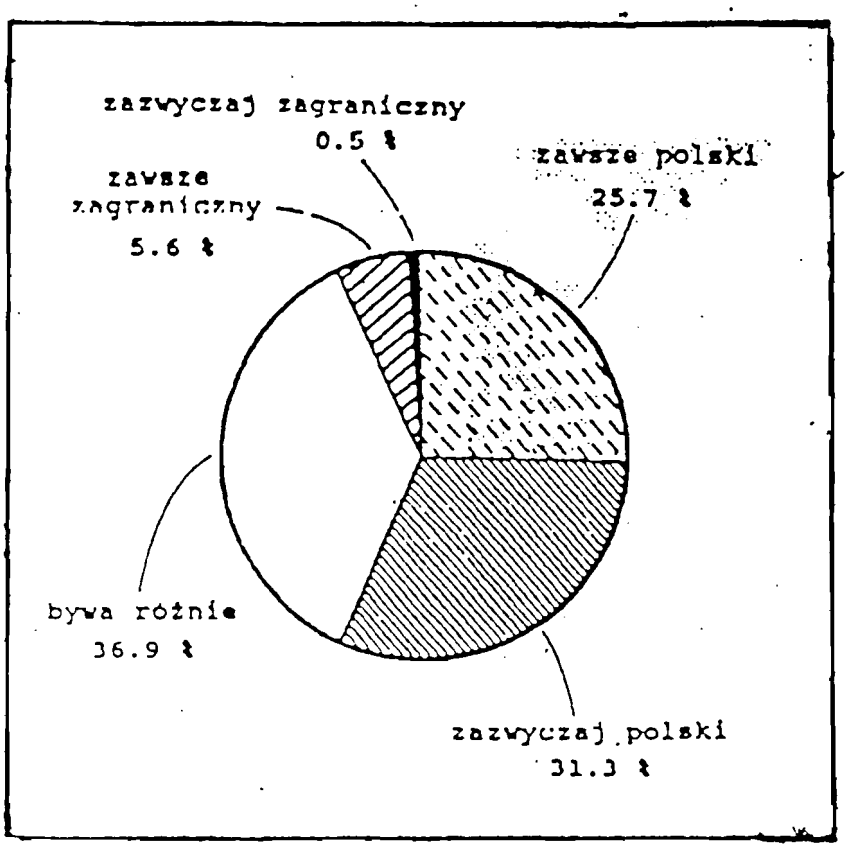
Jeśli zdarzy się, że może pani wybierać pomiędzy produktem polskim i importowanym (o podobnej cenie, jakości i opakowaniu), to kupuje pani:



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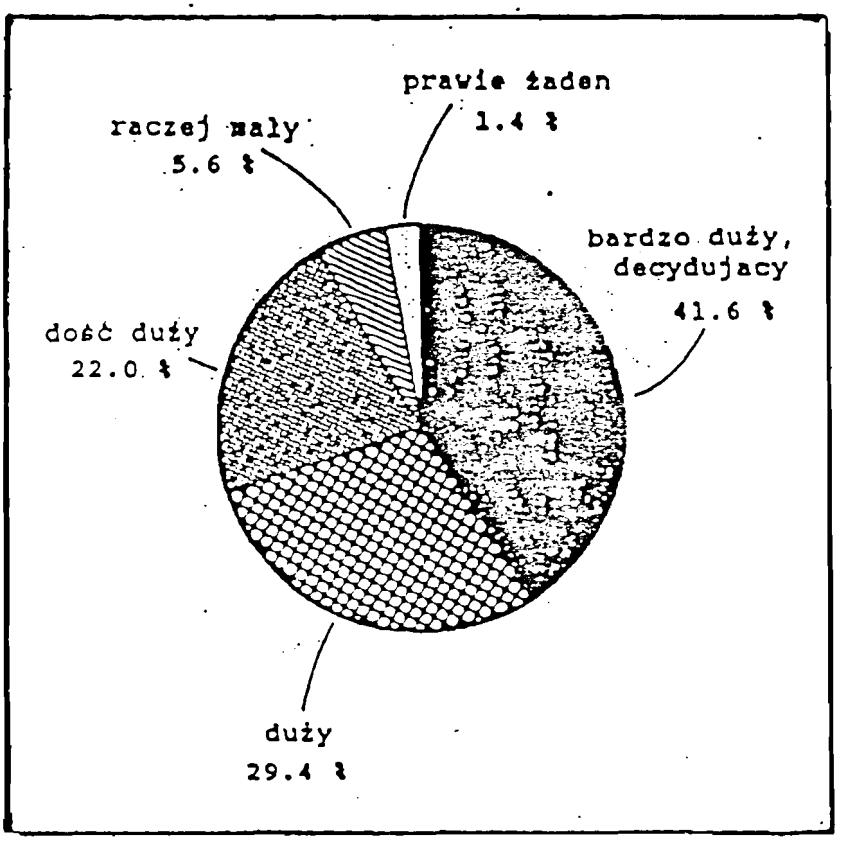
Jaki wpływ na decyzję zakupu żywności ma dla pani niska cena?



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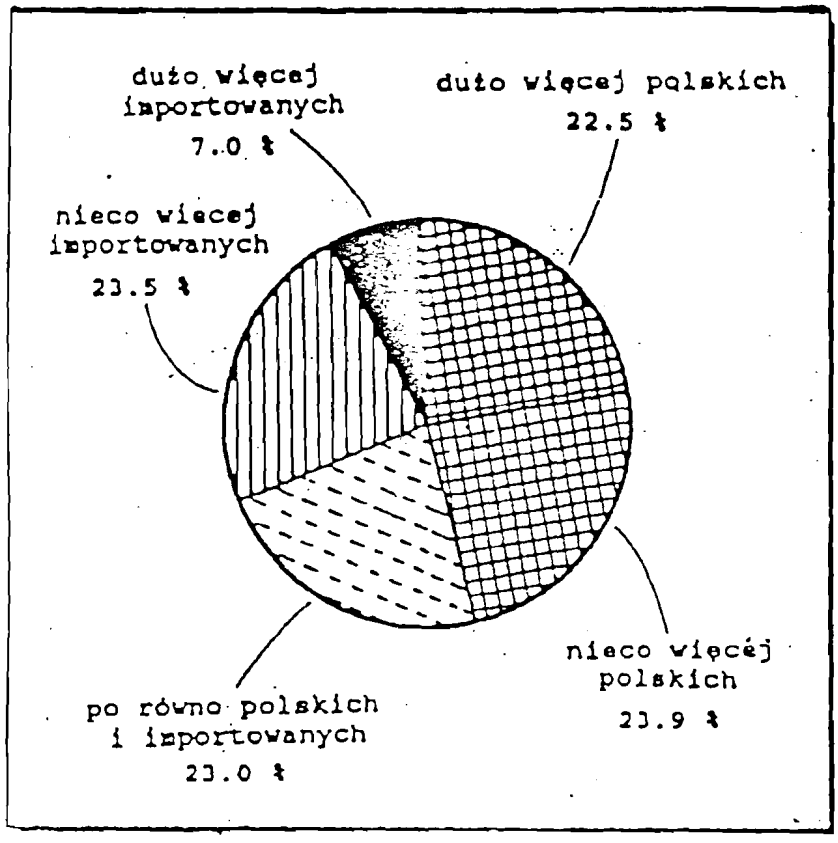
Jakich produktów spożywczych jest więcej w sklepach, w których zazwyczaj dokonuje pani zakupów?



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CZYNNIKI ZMIENNOŚCI RYNKU KONSUMENTA

- DOSTĘPNOŚĆ WIĘKSZEJ ILOŚCI DÓBR
- ZMIANY DEMOGRAFICZNE
- INFLACJA
- ROZMIARY I PODZIAŁ DOCHODÓW
- WZROST ILOŚCI KOBIET PRACUJĄCYCH
- WIĘCEJ CZASU WOLNEGO
- WIĘKSZY DOSTĘP DO KREDYTÓW
- WZROST LICZBY PRACOWNIKÓW WYKWALIFIKOWANYCH
- WYŻSZY POZIOM WYKSZTAŁCENIA

Złote zasady obsługi Klienta

KLIENT JEST NAJWAŻNIEJSZĄ OSOBĄ W PRZEDSIĘBIORSTWIE.

KLIENT NIE JEST OD NAS ZALEŻNY - MY JESTEŚMY ZALEŻNI OD KLIENTA.

KLIENT NIE JEST PRZESZKODĄ W NASZEJ PRACY - LECZ JEJ CELEM.

KLIENT ŚWIADCZY NAM UPRZEJMOŚĆ DZWONIĄC /PRZYCHODZĄC DO NAS - MY NIE ŚWIADCZYMY MU ŻADNEJ ŁASKI OBSŁUGUJĄC GO.

KLIENT JEST CZĘŚCIĄ NASZEJ FIRMY - NIE KIMŚ OBCYM.

KLIENT NIE JEST MARTWYM PRZEDMIOTEM - JEST CZŁOWIEKIEM Z KRWI I KOŚCI Z UCZUCIAMI JAK NASZE WŁASNE.

KLIENT NIE JEST KIMŚ Z KIM MOŻEMY SIĘ PORÓWNYWAĆ LUB SPRZECZAĆ.

KLIENT JEST OSOBĄ, KTÓRA PRZYNOSI NAM SWOJE ZACHCIANKI DO SPEŁNIENIA.

KLIENT ZASŁUGUJE NA TRAKTOWANIE Z NAJWYŻSZĄ UWAGĄ I UPRZJMOŚCIĄ NA JAKĄ NAS STAĆ.

KLIENT JEST ŹRÓDŁEM ŻYCIA TEJ I KAŻDEJ INNEJ FIRMY.

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ANALIZA PRODUKTU USŁUGI

OPIS PRODUKTU /USŁUGI/:

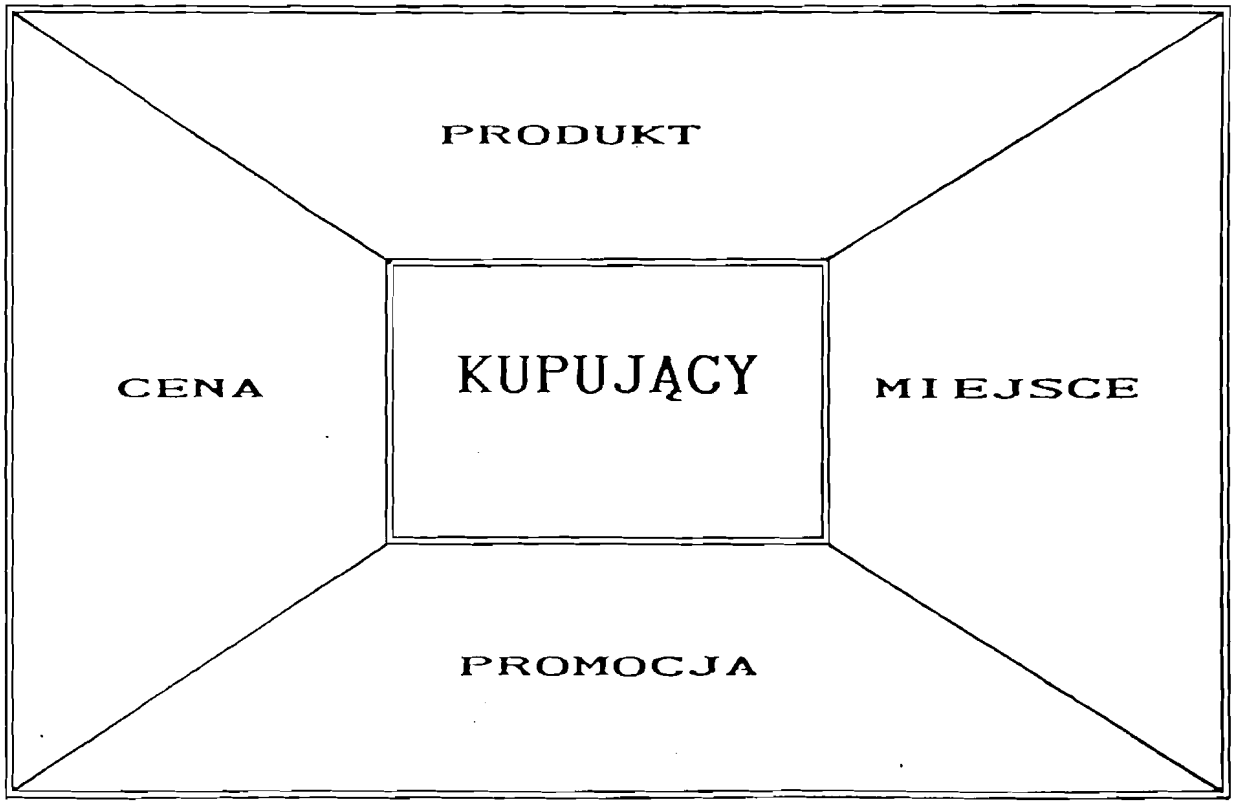
CECHY:

KORZYŚCI:

MOŻLIWOŚCI WYKORZYSTANIA:

197

Z E S P Ó Ł D E C Y Z J I M A R K E T I N G O W Y C H



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KTO, CO, KIEDY, GDZIE, DLACZEGO?

Odpowiedz na poniższe pytania w odniesieniu do twych klientów i twego przyszłego przedsiębiorstwa:

KTO BĘDZIE KUPOWAŁ:	
wiek płeć miejsce	

CO BĘDĄ KUPOWAĆ:	
cechy korzyści zastosowanie produktu wielkość zakupu	

KIEDY BĘDĄ KUPOWAĆ:	
sezon dzień tygodnia pora dnia	

GDZIE BĘDĄ KUPOWAĆ:	
konkurencja wygoda	

DLACZEGO BĘDĄ KUPOWAĆ:	
przyczyny emocjonalne przyczyny recjonalne	

III WARUNKI OSIĄGNIĘCIA SUKCESU W ZAWODZIE SPRZEDAWCY

Cele

Po tej części kursu uczestnik powinien:

1. Umieć zdefiniować pojęcie sprzedaży.
2. Wskazać korzyści z sukcesów w sprzedawaniu.
3. Znać cechy dobrego sprzedawcy.

200

INSTYTUT PRZEDSIĘBIORCZOSCI

Sprzedaż

Część III

Tytuł: Warunki osiągnięcia sukcesu w zawodzie sprzedawcy.

Zadanie: Zaznajomienie słuchaczy z warunkami wpływającymi na osiągnięcie sukcesu w zawodzie sprzedawcy.

Cele: Uczestnictwo w tej części kursu sprawi, że uczestnik będzie:

- umiał zdefiniować pojęcie sprzedaży,
- potrafił wskazać na korzyści z sukcesów w sprzedawaniu,
- potrafił określić cechy dobrego sprzedawcy.

Materiały:

Foliogramy

Folia B-1: Sam dokonaj wyboru.

Folia B-2: Korzyści z sukcesów w sprzedawaniu.

Folia B-3: Jaki powinien być sprzedawca.

Folia B-4: Test. Twój stosunek do sprzedawania.

Folia B-5: Skala zaufania do siebie.

SPRZEDAWCY

OSIĄGAJĄ SUKCESY

Osoby, które uczą się, a następnie doskonalą uznane techniki sprzedawania.

Osoby, które zachowują przyjacielską postawę wobec kupujących.

Sprzedający, którzy słuchają ich potencjalnych klientów.

Sprzedający, którzy uczą się gospodarowania swoim czasem oraz ustalania swoich priorytetów.

Osoby, które uważają siebie za umiejące rozwiązywać problemy.

Osoby, które znają sprzedawane towary.

Podaj własne przykłady:

ODNOSZĄ PORAŻKI

Osoby, które w stu procentach polegają na własnej osobowości.

Osoby, które mają negatywny stosunek do wszystkiego.

Sprzedawcy, którzy mówią bez przerwy, nie próbując zrozumieć potrzeb klienta.

Osoby, które bardziej zainteresowane są otrzymaniem prowizji ze sprzedaży, niż potrzebami klientów.

Sprzedawcy, którzy nie chcą uczyć się na własnych błędach.

Sprzedawcy, którzy nie starają się zapoznać z właściwościami sprzedawanych towarów oraz korzyściami płynącymi z ich posiadania.

Podaj własne przykłady:

Różnica między efektywnym a nieefektywnym sprzedawcą jest najczęściej sprawą wrażliwości, szczerości, postawy wobec nabywców oraz umiejętności sprzedawania. Tego wszystkiego można się nauczyć.

Źródło: Elwood N. Chapman, Sales Training

Korzyści z sukcesów w sprze--dawaniu

Studiowanie profesjonalnych technik sprzedaży może przynieść Tobie oprócz wyższych dochodów, także inne znaczne korzyści. Z poniższych dziesięciu stwierdzeń, trzy są nieprawdziwe.

Zaznacz "x" przy tych stwierdzeniach, które są nieprawdziwe po czym porównaj swoją odpowiedz z odpowiedzią zamieszczoną pod tym ćwiczeniem.

___ 1. Kontakty z klientami są znacznie ciekawsze niż rutynowa praca związana z wykonywaniem większości innych zawodów.

___ 2. Sprzedawanie wyzwala w człowieku to, co jest w nim najlepsze.

___ 3. Ludzie nie rodzą się sprzedawcami lecz nimi zostają. Jeżeli nie planujesz ciężkiej pracy nigdy nie staniesz się doskonałym sprzedawcą.

___ 4. Niewielu dyrektorów rozpoczęło swoje kariery jako sprzedawcy.

___ 5. Ci, którzy są dobrymi sprzedawcami szybko zwiększają swoje dochody.

___ 6. Studiowanie umiejętności sprzedawania pomoże Tobie w osiąganiu sukcesów w każdym rodzaju pracy w przyszłości.

___ 7. To czego uczysz się w czasie swojej pierwszej pracy jako sprzedawca, może być znacznie ważniejsze od Twoich zarobków.

___ 8. Zawód sprzedawcy wymaga mniejszego wysiłku w pracy niż inne zawody.

___ 9. W przypadku większości pozycji związanych ze sprzedawaniem posiadasz mniej swobody niż w innych zawodach.

10. Uśmiechnięcie się wymaga pracy mniejszej ilości mięśni, niż zrobienie niezadowolonej miny.

Traktuj swoją pierwszą pracę jako sprzedawca tak, jak okazję do sprawdzenia swoich poten-

SPRZEDAWCA POWINIEN BYĆ :

* ZDOLNY DO ŁATWEGO NAWIĄZYWANIA ROZMOWY
* PEWNY SIEBIE
* PEŁEN SZACUNKU DLA KLIENTÓW
* OTWARTY NA NOWE SYTUACJE
* UCZCIWY
* ENTUZJASTYCZNY
* USMIECHNIĘTY
* CHĘTNY DO POMOCY

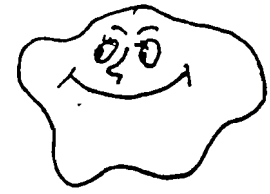
TWÓJ STOSUNEK DO SPRZEDAWANIA

	Zgadzam się				Nie zgadzam się
Nie ma nic poniżającego w sprzedawaniu towarów lub usług potencjalnym nabywcom.	5	4	3	2	1
Byłbym dumny mówiąc przyjaciołom, że wybrałem karierę w zawodzie sprzedawcy	5	4	3	2	1
Mam do nich życzliwy stosunek oraz mogę porozumieć się z klientami niezależnie od ich wieku, wyglądu czy zachowania.	5	4	3	2	1
Nawet kiedy mam zły dzień, kiedy nic nie idzie tak jak powinno, ciągle zachowuję pozytywną postawę wobec otoczenia.	5	4	3	2	1
Jestem entuzjastą sprzedawania.	5	4	3	2	1
Nawet jeżeli klienci odmówią dokonania zakupu, nie spowoduje to zmiany mojego pozytywnego stosunku do otoczenia.	5	4	3	2	1
Sprzedawanie jest zawodem.	5	4	3	2	1
Dobrzy sprzedawcy potrafią rozwiązywać problemy.	5	4	3	2	1
Sprzedawanie jest znakomitym sposobem zarabiania na życie.	5	4	3	2	1

RAZEM

Jeżeli osiągnąłeś ponad 40 punktów - posiadasz znakomity stosunek do sprzedawania jako zawodu. Jeżeli oceniłeś siebie pomiędzy 25 a 40 punktów, wydaje się że coś poważnego powstrzymuje Ciebie przed uznaniem powyższego. Osiągnięcie poniżej 25 punktów wskazuje, że prawdopodobnie najlepszy dla Ciebie byłby inny rodzaj pracy.

SKALA ZAUFANIA DO SIEBIE



Ocena zaufania do siebie

	Wysoka				Niska
Szybko i łatwością mogę uczynić obce mi osoby moimi przyjaciółmi.	5	4	3	2	1
Potrafię zwrócić na siebie i utrzymywać uwagę innych, nawet jeżeli ich nie znam.	5	4	3	2	1
Uwielbiam znajdować się w nowych sytuacjach.	5	4	3	2	1
Jestem zaintrygowany psychologią nawiązywania kontaktów oraz budowania dobrych stosunków z nieznajomymi osobami.	5	4	3	2	1
Cieszyłbym się mając możliwości zaprezentowania wyrobów grupie dyrektorów przedsiębiorstw.	5	4	3	2	1
Kiedy jestem ubrany stosownie do danej okazji, to czuję się pewny siebie.	5	4	3	2	1
Nie jest dla mnie kłopotliwe używanie telefonu, aby umówić się z nieznanymi mi osobami.	5	4	3	2	1
Nie jestem onieśmielany przez inne osoby	5	4	3	2	1
Rozwiązywanie problemów jest dla mnie przyjemnością.	5	4	3	2	1
Najczęściej, czuję się całkowicie bezpiecznie.	5	4	3	2	1

RAZEM

Źródło: Elwood N. Chapman, Sales Training

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SPRZEDAŻ UZUPEŁNIAJĄCA

(SPRZEDAŻ TAKICH TOWARÓW, KTÓRE ŁATWO MOŻNA SPRZEDAWAĆ RAZEM Z INNYMI)

W wielu sytuacjach powstających w czasie sprzedawania (na przykład sprzedaż detaliczna), kiedy klient zdecuduje się już na nabycie jednego wyrobu, staje się on potencjalnym nabywcą innych wyrobów, które umożliwiają, ułatwiają lub uprzyjemniają korzystanie z nabytego wyrobu.

Niektóre rzeczy kupuje się razem z innymi. Na przykład:

Marynarka, koszula, krawat, itd.

Szminka, cień do powiek, puder, itd.

Hamburger, frytki.

PC komputer, programy komputerowe, drukarka oraz inne artykuły jak: papier, taśma do drukarki, dyski, itd.

Jeżeli sprzedawca poleca dodatkowe artykuły (uzupełniające możliwości korzystania z podstawowego wyrobu), to wyświadcza on w ten sposób klientowi przysługę oszczędzając czas tego klienta, który inaczej musiałby być przeznaczony na dokonywanie dodatkowych zakupów artykułów czyniących nabyte wcześniej wyroby bardziej użytecznymi.

ZOSTAŃ EKSPERTEM W SPRZEDAŻY UZUPEŁNIAJĄCEJ

PSYCHOLOGIA SPRZEDAWANIA

Poniżej znajduje się kilka wskazówek (psychologicznych narzędzi handlu), które powinny pomóc Tobie w zademonstrowaniu, że znajdujesz się na drodze do stania się efektywnym sprzedawcą.

Staraj się uczynić klientów zadowolonymi z siebie. Kiedy słuchasz klientów z szacunkiem i pomagasz im w podjęciu decyzji, a następnie chwalisz za dokonany wybór - zwiększasz ich poczucie własnej wartości. Takie postępowanie sprzyja powstawaniu lepszych kontaktów między Tobą a klientami.

Od czasu do czasu spodziewaj się odmowy dokonania zakupu. Sportowe powiedzenie: "Nie możesz wygrać wszystkiego", jest właściwe także w handlu. Bądź przygotowany na chwilowe niepowodzenia, a nie będziesz marnował czasu rozmyślając nad porażkami kiedy się one Tobie przydarzą.

Otwarcie przyznaj, że nie masz wszystkich odpowiedzi na skomplikowane problemy klienta. Profesjonalny doradca (lub umiejący sobie radzić sprzedawca) bierze udział w rozwiązywaniu problemów współpracując z klientem - jednak nigdy nie przybiera on pozy osoby wiedzącej wszystko bez wyjątku.

Bądź zdolny do zmiany sytuacji przynoszących rozczarowania, w sytuacje korzystne dla Ciebie. Kiedy Twoje kontakty z klientem są dobre, to nawet jeżeli w jakimś przypadku nie zakupi on niczego - ciągle istnieją możliwości dokonania sprzedaży w przyszłości. Na przykład, klient może przekazać informacje o Tobie komuś innemu (co często się zdarza) lub sam dokonać zakupu w przyszłości.

Lepszy wróbel w ręku niż gołąb na dachu. Nie bądź naiwny w swoich nadziejach na dokonanie sprzedaży. Sprzedaż jest niezakończona do czasu, kiedy pieniądze znajdą się w banku. Zbyt wiele razy niedoświadczeni sprzedawcy traktowali otrzymanie zamówienia tak, jak sfinalizowanie sprzedaży, bez upewnienia się - że rzeczywiście wszystkie elementy transakcji zostały dokonane.

Organizuj swój czas pracy. Większość mających problemy sprzedawców, ma je z powodu nieopracowywania planów swoich działań na każdy dzień. Dla niezorganizowanego sprzedawcy kończy się z reguły to nastrojem frustracji, zniechęceniem oraz niewieloma zamówieniami. Osoba potrafiąca dobrze zorganizować swój czas ma poczucie zadowolenia ze swoich osiągnięć oraz dobrze wykonywanej pracy.

Dodatkowe materiały do wykorzy-
-stania w trakcie kursu

1. *Film:* "Jak odnieść sukces w sprzedaży." Czas 60 min.

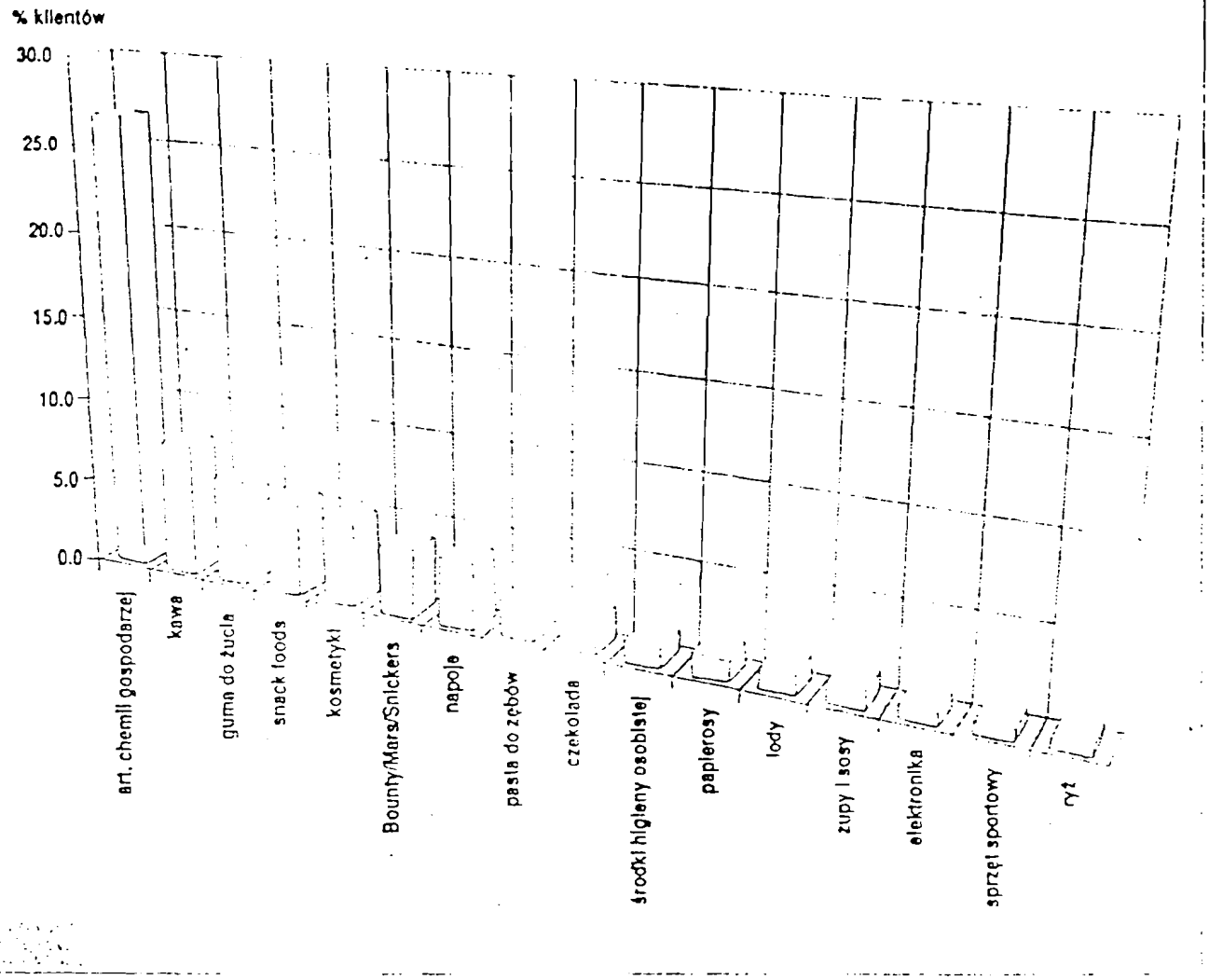
2. *Foliogramy uzupełniające:*

   Folia D-1: Towary kupowane pod wpływem reklamy.

   Folia D-2: Na co klienci zwracają uwagę w reklamie.

   Folia D-3: Apele reklamowe nielubiane przez klientów.

Towary kupowane pod wpływem reklamy.



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Źródło: Businessman Magazine

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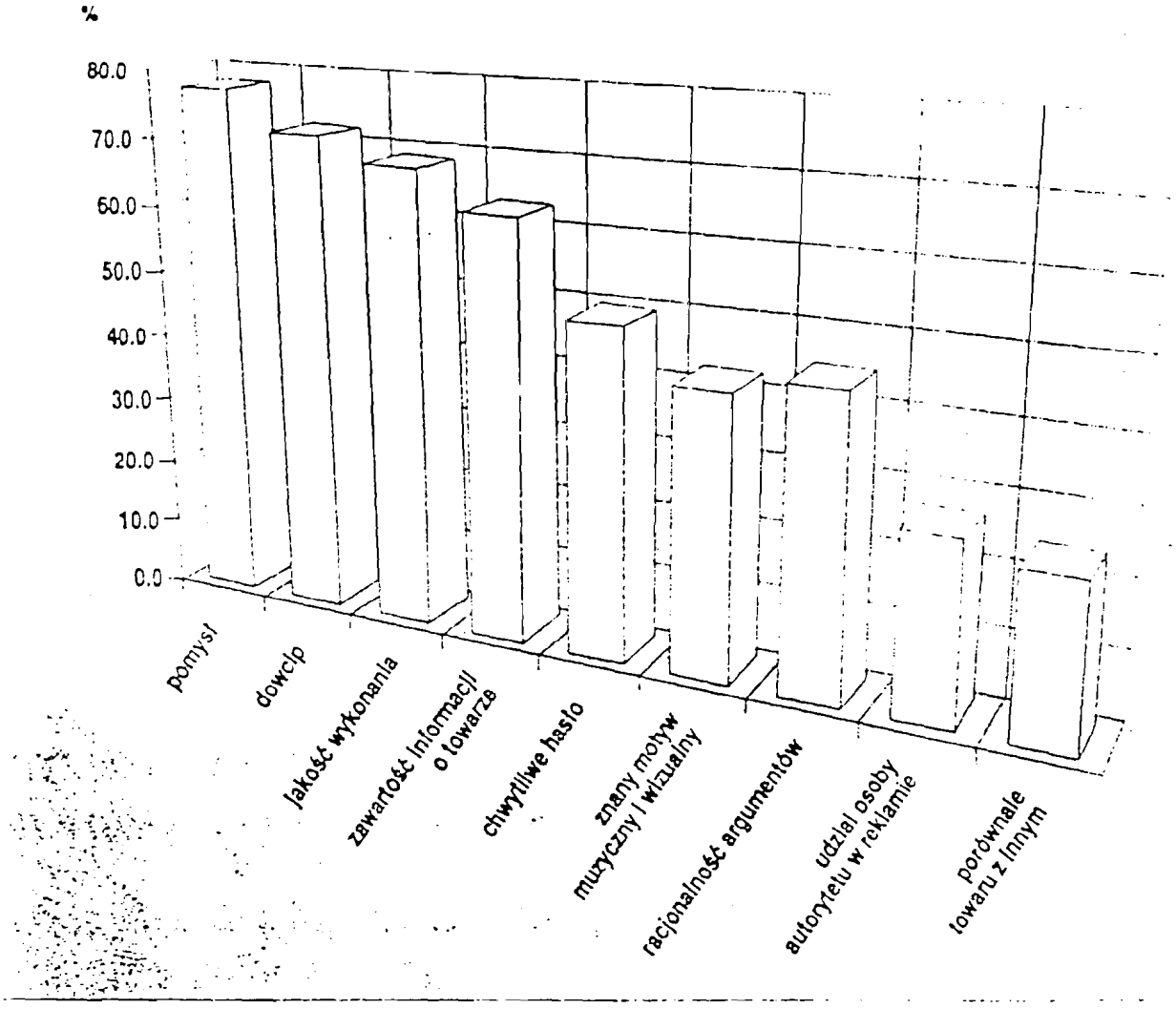
Na co klienci zwracają uwagę w reklamie?



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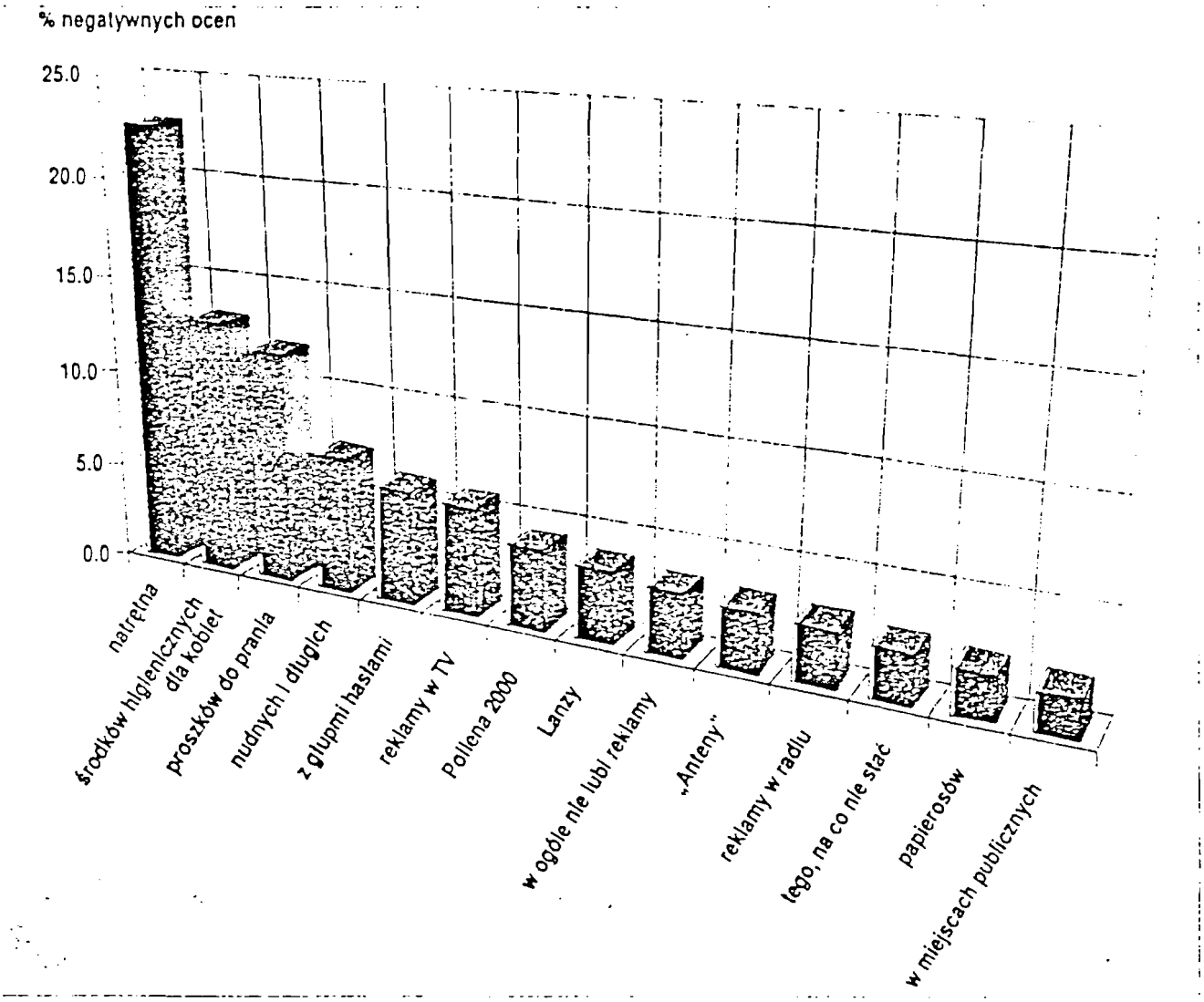
Źródło: Businessman Magazine

Apele reklamowe niehubiane przez klientów.



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Źródło: Businessman Magazine

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JAK ODNIEŚĆ SUKCES W SPRZEDAŻY

REŻYSERIA: WOJCIECH JANKOWSKI

PRODUCENT:
BIURO DORADZTWA I ORGANIZACJI synergia

GDAŃSK, UL. FISZERA 4, TEL./FAX 41 78 20

WSZYSTKIE PRAWA PRODUCENTA WIDEOFONICZNEGO ORAZ PRAWA AUTORSKIE DO NAGRAŃ UTWORÓW ZASTRZEŻONE

POWIELANIE, WYNAJMOWANIE, WYPOŻYCZANIE, WYKORZYSTOWANIE KASETY DLA WYKONAŃ PUBLICZNYCH I NAGRAŃ RTV BEZ ZEZWOLENIA ZABRONIONE!

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

3. Elwood N.Chapman, Sales Training Basics: A Primer for Those New to Selling, Crisp Publication, Inc., 1990.

4. Charles Futrell, Sales Management, 3rd-ed.,The Dryden Press., 1989.

5. Philip Kotler, Marketing Mnagement, 7th-ed., Marketing Management, Prentice Hall, Inc., 1991.

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 33 Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: RENNOW

Your Current Occupation: KUPIEC

Your Occupational Goals: _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: HIGH SCHOOL

Field of Study: TRADE

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

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INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued on back of page

BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	1	2	3	4	5
2.	Greater Professional Skills	2.	1	2	3	4	5
3.	Exposure to Professional and/or Personal Contacts	3.	1	2	3	4	5
4.	Diploma or Certificate of Completion	4.	1	2	3	4	5
5.	Salary Increase	5.	1	2	3	4	5
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	1	2	3	4	5
7.	Better Able to Complete Research	7.	1	2	3	4	5
8.	Better Able to Direct Projects	8.	1	2	3	4	5
9.	Better Able to Teach Others	9.	1	2	3	4	5
10.	Better Able to Make Policy	10.	1	2	3	4	5
11.	Better Able to Lead Company	11.	1	2	3	4	5
12.	I attended the program regularly	12.	1	2	3	4	5
13.	The project staff is very helpful	13.	1	2	3	4	5
14.	The overall program will increase my understanding of the free market economy	14.	1	2	3	4	5
15.	The overall program will have long lasting benefits	15.	1	2	3	4	5
16.	The overall program seems to be well organized	16.	1	2	3	4	5
17.	Access to instructors and project staff is quite good	17.	1	2	3	4	5
18.	I have been able to establish valuable business contacts	18.	1	2	3	4	5

Thank you for your time and cooperation.

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This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 25 Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: RZCHOW

Your Current Occupation: _____

Your Occupational Goals: _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: _____

Field of Study _____

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

BEST AVAILABLE DOCUMENT

INSTRUCTIONS:

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Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	1	2	3	4	5
2.	Greater Professional Skills	2.	1	2	3	4	5
3.	Exposure to Professional and/or Personal Contacts	3.	1	2	3	4	5
4.	Diploma or Certificate of Completion	4.	1	2	3	4	5
5.	Salary Increase	5.	1	2	3	4	5
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	1	2	3	4	5
7.	Better Able to Complete Research	7.	1	2	3	4	5
8.	Better Able to Direct Projects	8.	1	2	3	4	5
9.	Better Able to Teach Others	9.	1	2	3	4	5
10.	Better Able to Make Policy	10.	1	2	3	4	5
11.	Better Able to Lead Company	11.	1	2	3	4	5
12.	I attended the program regularly	12.	1	2	3	4	5
13.	The project staff is very helpful	13.	1	2	3	4	5
14.	The overall program will increase my understanding of the free market economy	14.	1	2	3	4	5
15.	The overall program will have long lasting benefits	15.	1	2	3	4	5
16.	The overall program seems to be well organized	16.	1	2	3	4	5
17.	Access to instructors and project staff is quite good	17.	1	2	3	4	5
18.	I have been able to establish valuable business contacts	18.	1	2	3	4	5

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 14.02.94

Age: _____ Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: BERSON

Your Current Occupation: TEACHER

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [ ] No

Highest Level of Education:

Field of Study: ECONOMICS

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [X] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

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Thank you.

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3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it related to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued from front page.

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

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Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have [illegible] able to obtain valuable business contacts	18.	[illegible]	4	3	2	1

Thank you for your time and cooperation.

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[illegible] should [illegible] 16200 [illegible] #[illegible], [illegible], CA 91436 USA

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 14.02.94

Age: _____ Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: RESSOD

Your Current Occupation: DIRECTOR

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: UNIVERSITY

Field of Study: ECONOMICS

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

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Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	The quality of instruction was excellent.	1.	5	4	3	2	1
2	The instructional materials are well designed.	2.	5	4	3	2	1
3	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6	The instructors seemed to be well versed in the topic as it relates to my country	6	5	4	3	2	1
7	The course met my expectations.	7.	5	4	3	2	1
8	The course was not relevant to the business situation I am currently experiencing.	8	5	4	3	2	1
9	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	[illegible]	18.	5	4	3	2	1

Thank you for your time and cooperation.

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[illegible] Blvd. #224 [illegible], CA 91436 USA

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 38 Sex: [X] M [ ] F

Title/Topic of this course: SELLING SEMINAR

Location: RZESZOW

Your Current Occupation: ENTREPRENEUR

Your Occupational Goals: TO DEVELOP SELLING SKILLS OF MY WORKERS

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: DOCTOR OF ECONOMICS

Field of Study: ECONOMETRICS AND STATISTICS

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	(5)	4	3	2	1
2.	The instructional materials are well designed.	2.	(5)	4	3	2	1
3.	The content of this course is relevant to my needs	3.	(5)	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	(1)
5.	The instructor seem to be concerned about the participants progress.	5.	(5)	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	(5)	4	3	2	1
7.	The course met my expectations.	7.	(5)	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	(1)
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	(1)
10.	The facility was well suited for this program.	10.	(5)	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	(5)	4	3	2	1

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Continued from front page.

BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17	5	4	3	2	1
18	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to: [illegible] 16[illegible] W[illegible] Blvd. #224 P[illegible], CA 91436 USA

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* How could we improve the course ?

Jak można ulepszyć kurs ?

It's possible to add some additional materials dealing with specific kind of selling (for example: computers and meat)

* What did you like best about the course ?

Co Panu(Pani) najbardziej podobało się na kursie ?

Well prepared materials and well prepared instructor

* What did you like least about the course ?

Co Panu(Pani) podobało się najmniej na kursie ?

* How did you feel about the price of the course ?

Co Panu(Pani) sądzi o cenie kursu ?

There was no charge

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 14.02.94

Age: _____ Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: RESSION

Your Current Occupation: TEACHER

Your Occupational Goals: _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: UNIV.

Field of Study: ECONOMICS

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [X] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

BEST AVAILABLE DOCUMENT

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	The quality of instruction was excellent	1.	5	4	3	2	1
2	The instructional materials are well designed.	2.	5	4	3	2	1
3	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4	5	4	3	2	1
5	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6	The instructors seemed to be well versed in the topic as it relates to my country.	6	5	4	3	2	1
7	The course met my expectations.	7.	5	4	3	2	1
8	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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Continued from front page.

BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	[illegible] able to establish valuable business [illegible]	18.	5	4	3	2	1

Thank you for your time and cooperation.

This [illegible] be returned [illegible] 10200 [illegible] Blvd., #224 [illegible], CA 91436 USA

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BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: _____

Age: 33 Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: RUENGOW

Your Current Occupation: KUPIEC

Your Occupational Goals: _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: HIGH SCHOOL

Field of Study: TRADE

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	(4)	3	2	1
2.	The instructional materials are well designed.	2.	5	(4)	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	(3)	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	(4)	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	(5)	4	3	2	1
7.	The course met my expectations.	7.	(5)	(4)	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	(4)	3	2	1
9.	The instructional materials are difficult to understand.	9.	(5)	4	3	2	1
10.	The facility was well suited for this program.	10.	5	(4)	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	(4)	3	2	1

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BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	1	2	3	4	5
2.	Greater Professional Skills	2.	1	2	3	4	5
3.	Exposure to Professional and/or Personal Contacts	3.	1	2	3	4	5
4.	Diploma or Certificate of Completion	4.	1	2	3	4	5
5.	Salary Increase	5.	1	2	3	4	5
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	1	2	3	4	5
7.	Better Able to Complete Research	7.	1	2	3	4	5
8.	Better Able to Direct Projects	8.	1	2	3	4	5
9.	Better Able to Teach Others	9.	1	2	3	4	5
10.	Better Able to Make Policy	10.	1	2	3	4	5
11.	Better Able to Lead Company	11.	1	2	3	4	5
12.	I attended the program regularly	12.	1	2	3	4	5
13.	The project staff is very helpful	13.	1	2	3	4	5
14.	The overall program will increase my understanding of the free market economy	14.	1	2	3	4	5
15.	The overall program will have long lasting benefits	15.	1	2	3	4	5
16.	The overall program seems to be well organized	16.	1	2	3	4	5
17.	Access to instructors and project staff is quite good	17.	1	2	3	4	5
18.	I have been able to establish valuable business contacts	18.	1	2	3	4	5

Thank you for your time and cooperation.

BEST AVAILABLE DOCUMENT

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 14.02.04

Age: _____ Sex: [X] M [ ] F

Title/Topic of this course: SELLING

Location: MATHOW

Your Current Occupation: TEACHER

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education: UNIVERSITY

Field of Study: ECONOMICS

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1	The quality of instruction was excellent.	1.	5	(4)	3	2	1
2	The instructional materials are well designed.	2.	5	(4)	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	(4)	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	(1)
5	The instructor seem to be concerned about the participants progress.	5.	(5)	4	3	2	1
6	The instructors seemed to be well versed in the topic as it relates to my country.	6.	(5)	4	3	2	1
7.	The course met my expectations.	7.	(5)	4	3	2	(1)
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	(1)
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	(1)
10.	The facility was well suited for this program.	10.	(5)	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	(5)	4	3	2	1

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Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

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This form should be returned to [illegible] 16200 Ventura Blvd. [illegible] Encino, CA 91436 USA

HUMAN RESOURCE MANAGEMENT SEMINAR

Purpose: to prepare the participants to deal with all the aspects of small business management what involve selecting and hiring, building teams cooperation, encouraging and motivating employees in terms of professional and personal development through planning trainings, appraisals and rewards.

Objectives: Upon completion of the seminar, the participants will learn how to :

- set an employees policy for a small business
  recruit new and keep old employees
- understand the role of employees' personal as well professional development
- apply performance appraisal concepts
- recognize the importance of small groups dynamics
- establish a compensation system
- understand the need of discipline, dismissal of employees as will as employees' promotion
- prepare own agenda

A PROGRAM OF THE HUMAN RESOURCE MANAGEMENT SEMINAR

CONTENT	PROCESS
1. Managerial competencies	HO 1-1
a/ Management and the employees policy - factors of success	TP 1-1
b/ Human resource management - according to L.E. Iacocca	
c/ The rules of taking decisions - individual decisions - group decisions	Presenting the methodology of individual decision taking and advantages and disadvantages of group decision taking
d/ Manager's responsibility in the scope of the employees policy	TP 1-2
e/ Tasks assignment	TP 1-3
2. The role of individual and groups in a small business	Describe the role of groups of employees, developing good relationship among employees. Discuss the differences in managing groups and individuals.
Team building	Discuss a case *Swiss Catering Service* HO 2-1
3. Employees'and employers'needs and expectations	
a/ employees' expectations	TP 3-1
b/ employers' expectations	TP 3-2 Encourage the participants to discuss the issue of employees' needs
4. The process of recruiting employees - using questionnaires and their usefulness	Present and discuss an example of grades chart to be used while recruiting

CONTENT	PROCESS
5. Motivation and management	TP 5-1 Rules of establishing a motivation program
a/ Establishing and evaluating a motivation program	TP 5-2 Motivation models - case study - individual and groups exercises
b/ Understanding the need of making additions to the daily work and its motivational affect	Test 5.1 Preparing own employees policy TP 5-3 Rules of establishing compensation systems
c/ Job development and its motivational aspect	TP 5-4
6. Performance appraisal	TP 6-1
a/ The concept of evaluating employee's performance	TP 6-2
b/ The structure and methods of evaluating employee's performance	TP 6-3 Questionnaire Have the participants prepare such a questionnaire related to their businesses - individual and group exercise and discussion TP 6-4 TP 6-5 TP 6-6
c/ Mistakes in the evaluating process	
7. Managerial work organization	
a/ Rules of good work organization (according to Gallagher)	TP 7-1
b/ Time management	TP 7-2
c/ Self-evaluation	Test 7.1

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CONTENT	PROCESS
8. Sources of the managerial power; different styles of managing people Styles of managing people	Discuss sources of effectiveness in managing people TP 8-1: Rules for using methods to modify behavior TP 8-2 TP 8-3 Management styles and the employees impact on decision taking process TP 8-4 Delegation TP 8-5 Managers unwilling to delegate the job
9. The role of control in managing people a/ Problem related to controlling b/ Characteristics of effective control systems	 TP 9-1 TP 9-2 Have the participants discuss methods of establishing and verifying control systems used in their small businesses
10. Conflicts and conflict resolutions	Discuss the potential sources of conflicts and what is the manager's role in solving them.

The list of participants seminar organized for staff

on topic "Human Resource Managment"

date	faculty	hrs	participants
15-16III	prof.W. Pukniel prof.J. Turner	6	1. A. Kondracka 2. K. Kaczyńska 3. A. Chmielak 4. B. Plawgo 5. M. Fiedorczyk 6. D. Małaszkiewicz

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 3.16.94r

Age: 65 Sex: [X] M [ ] F

Title/Topic of this course: Human Resource Management

Location: Business school of Bialystok

Your Current Occupation: teacher

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: P.H.D

Field of Study: Economy

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	(5)	4	3	2	1
2.	The instructional materials are well designed.	2.	(5)	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	(5)	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	(4)	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	(5)	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	(4)	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	(5)	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 16.3.94

Age: _____ Sex: [X] M [ ] F

Title/Topic of this course: Human Resource Management

Location: Business School in Bsty

Your Current Occupation: teacher

Your Occupational Goals: _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: Grad of Economy

Field of Study: Economy

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [X] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

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INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 16.03.94

Age: 37 Sex: [ ] M [X] F

Title/Topic of this course: Human Resource Management

Location: Business School of Bielystok

Your Current Occupation: teacher

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: College of Economy

Field of Study: Economy

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 16.05.94

Age: 33 Sex: [ ] M [X] F

Title/Topic of this course: Human Resource Menagment

Location: Białystok Business School

Your Current Occupation: Teacher

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: University degree

Field of Study: Marketing

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 16.03.94

Age: 28 Sex: [ ] M [X] F

Title/Topic of this course: Human Resource Management

Location: Business School in Bialystok

Your Current Occupation: teacher

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [ ] No

Highest Level of Education: College of law

Field of Study: law

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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BEST AVAILABLE DOCUMENT

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 3.16.94

Age: 27 Sex: [ ] M [X] F

Title/Topic of this course: Human Resource Management

Location: Bangkok Business School

Your Current Occupation: teacher

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [ ] Yes [X] No

Highest Level of Education: University

Field of Study: Law

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [X] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:	6.	5	4	3	2	1
6.	Better Able to Manage People	7.	5	4	3	2	1
7.	Better Able to Complete Research	8.	5	4	3	2	1
8.	Better Able to Direct Projects	9.	5	4	3	2	1
9.	Better Able to Teach Others	10.	5	4	3	2	1
10.	Better Able to Make Policy	11.	5	4	3	2	1
11.	Better Able to Lead Company						
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

This form should be returned to Dr. Koltai 16200 Ventura Blvd. #224 Encino, CA 91436 USA

HUMAN RESOURCE MANAGEMENT SEMINAR

Purpose: to prepare the participants to deal with all the aspects of small business management what involve selecting and hiring, building teams cooperation, encouraging and motivating employees in terms of professional and personal development through planning trainings, appraisals and rewards.

Objectives: Upon completion of the seminar, the participants will learn how to :

- set an employees policy for a small business
  recruit new and keep old employees
- understand the role of employees' personal as well professional development
- apply performance appraisal concepts
- recognize the importance of small groups dynamics
- establish a compensation system
- understand the need of discipline, dismissal of employees as will as employees' promotion
- prepare own agenda

A PROGRAM OF THE HUMAN RESOURCE MANAGEMENT SEMINAR

CONTENT	PROCESS
1. Managerial competencies	HO 1-1
a/ Management and the employees policy - factors of success	TP 1-1
b/ Human resource management - according to L.E. Iacocca	
c/ The rules of taking decisions - individual decisions - group decisions	Presenting the methodology of individual decision taking and advantages and disadvantages of group decision taking
d/ Manager's responsibility in the scope of the employees policy	TP 1-2
e/ Tasks assignment	TP 1-3
2. The role of individual and groups in a small business	Describe the role of groups of employees, developing good relationship among employees. Discuss the differences in managing groups and individuals.
Team building	Discuss a case *Swiss Catering Service* HO 2-1
3. Employees'and employers'needs and expectations	
a/ employees' expectations	TP 3-1
b/ employers' expectations	TP 3-2 Encourage the participants to discuss the issue of employees' needs
4. The process of recruiting employees - using questionnaires and their usefulness	Present and discuss an example of grades chart to be used while recruiting

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CONTENT	PROCESS
5. Motivation and management	TP 5-1 Rules of establishing a motivation program
a/ Establishing and evaluating a motivation program	TP 5-2 Motivation models - case study - individual and groups exercises
b/ Understanding the need of making additions to the daily work and its motivational affect	Test 5.1 Preparing own employees policy TP 5-3 Rules of establishing compensation systems
c/ Job development and its motivational aspect	TP 5-4
6. Performance appraisal	TP 6-1
a/ The concept of evaluating employee's performance	TP 6-2
b/ The structure and methods of evaluating employee's performance	TP 6-3 Questionnaire Have the participants prepare such a questionnaire related to their businesses - individual and group exercise and discussion TP 6-4 TP 6-5 TP 6-6
c/ Mistakes in the evaluating process	
7. Managerial work organization	
a/ Rules of good work organization (according to Gallagher)	TP 7-1
b/ Time management	TP 7-2
c/ Self-evaluation	Test 7.1

CONTENT	PROCESS
8. Sources of the managerial power; different styles of managing people Styles of managing people	Discuss sources of effectiveness in managing people TP 8-1: Rules for using methods to modify behavior TP 8-2 TP 8-3 Management styles and the employees impact on decision taking process TP 8-4 Delegation TP 8-5 Managers unwilling to delegate the job
9. The role of control in managing people a/ Problem related to controlling b/ Characteristics of effective control systems	 TP 9-1 TP 9-2 Have the participants discuss methods of establishing and verifying control systems used in their small businesses
10. Conflicts and conflict resolutions	Discuss the potential sources of conflicts and what is the manager's role in solving them.

ZASADY KIEROWANI LUDZMI (wg L. E. Iacocca)

Folia 1.1

Powiedz ludziom o swoich zasadach pracy

Stwórz warunki motywujące do pracy

Miej stały kontakt z pracownikami

Wynagradzaj za wyniki

Uznawaj ryzyko w decyzjach podwładnych

Daj szansę innym decydować

Właściwie podziel kompetencje

Zgraj uprawnienia z obowiązkami i odpowiedzialnością

Stosuj dyscyplinę logiczną - nie próbuj zmieniać postaw, zachowań, osobowości

Ufaj ludziom, których wybrałeś

Bądź otwarty na inicjatywy

Ustal zasady oceniania i kontroli

Oceniaj zachowania, a nie osoby

Informuj o wynikach oceny

ZADANIA SZEFA FIRMY LUB MENEDŻERA PERSONALNEGO W SFERZE POLITYKI PERSONALNEJ

1. Tworzenie dobrego image małego biznesu oraz firmy
2. Zatrudnienie starannie dobranych pracowników
3. Kreowanie więzi dobrych pracowników z firmą
4. Tworzenie systemów motywacyjnych wynagradzania i rozwoju osobowego pracowników
5. Regularne spotkania z pracownikami w celu przedyskutowania problemów firmy
6. Informowanie o celu każdej pracy
7. Analizowanie każdej pracy
8. Zachęcanie do wyrażania opinii nawet jeżeli są sprzeczne z poglądami szefa
9. Szkolenie pracowników

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JAK FORMUŁOWAĆ ZADANIA?

1. PRACOWNICY ODPOWIEDZIALNI ZA WYKONANIE ZADAŃ POWINNI UCZESTNICZYĆ W ICH OPRACOWYWANIU - TO PRZECIEŻ MAJĄ BYĆ ICH ZADANIA.
2. ZADANIA POWINNY OBEJMOWAĆ PRZEDE WSZYSTKIM KLUCZOWE OBSZARY DZIAŁANIA ZESPOŁU LUB JEDNOSTKI, CZYLI TAKIE, KTÓRE DECYDUJĄ O SUKCESIE LUB PORAŻCE.
3. PAMIĘTAJ: OKREŚLANIE ZADAŃ TO WYZNACZANIE KOŃCOWYCH REZULTATÓW, A NIE SPOSOBÓW ICH OSIĄGNIECIA; TO UDZIELANIE ODPOWIEDZI NA PYTANIA: KTO? CO? I DO KIEDY? POWINIEN ZROBIĆ.
4. PAMIĘTAJ: ODPOWIADAJĄC NA PYTANIE JAK COŚ ZROBIĆ? NIE FORMUŁUJESZ ZADANIA LECZ TWORZYSZ INSTRUKCJE.
5. ZADANIA MUSZĄ BYĆ WYMIERNE, SFORMUŁOWANE W TAKI SPOSÓB ABY ANALIZUJĄC UZYSKANE WYNIKI MOŻNA BYŁO W SPOSÓB NIE BUDZĄCY WĄTPLIWOŚCI USTALIĆ CZY ZOSTAŁY ONE WYKONANE CZY TEŻ NIE.
6. ZADANIA POWINNY BYĆ AMBITNE, ALE MOŻLIWE DO WYKONANIA.
7. OGRANICZAJ LICZBĘ ZADAŃ - ROZSĄDNA ICH LICZBA TO 5 - 10.
8. PAMIĘTAJ: KAŻDE ZADANIE MUSI MIEĆ POKRYCIE W ZASOBACH.
9. SKOORDYNUJ ZADANIA WŁASNE I ZADANIA SWOICH PODWŁADNYCH Z ZADANIAMI INNYCH OSÓB, ZESPOŁÓW I CZĘŚCI ORGANIZACJI.
10. PAMIĘTAJ: REALIZACJA ZADAŃ POWINNA ODBYWAĆ SIĘ POD KIERUNKIEM I KONTROLĄ TYCH, KTÓRZY PONOSZĄ ZA NIE ODPOWIEDZIALNOŚĆ.
11. ROZSTRZYGNIJ CZY ZADANIA WYSTARCZY PRZEKAZAĆ WYKONAWCOM USTNIE, CZY LEPIEJ TO ZROBIĆ NA PIŚMIE.

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BUDOWA ZESPOŁU - KIEROWNIK JAKO LIDER

Głównym celem tworzenia zespołu jest chęć lub potrzeba zastosowania naukowej wiedzy o zachowaniu i technologii, co mogłoby się przyczyniać do wzrostu efektywności.

Badając sprawność działania kierowników w 75.000 firm amerykańskich, zatrudniających blisko 20.000 menedżerów, Rensis Likiert doszedł do wniosku, że kluczem sprawnego funkcjonowania organizacji.

gwarantującym możliwość rozwiązania jej problemów w sposób skuteczny, są zorganizowane grupy pracownicze a nie kierownicy, działający w izolacji. Korzystne jest zatem zarządzanie przez cele nie w sposób indywidualny ale przez zaangażowanie zespołów pracowniczych.

W tej sytuacji zmienia swój charakter ocena wyników pracy zespołów i jednostek oraz związany z tym sposób nagradzania i awansowania. Kierownicy zmieniają swoje dotychczasowe funkcje. Pojawiają się liderzy-przywódcy zespołu tj. osoby wybierane lub akceptowane przez stworzone zespoły pracownicze. Wymagania stawiane liderom obejmują różne cechy i kryteria.

Celem działania lidera jest pobudzenie u każdego pracownika wysokiej motywacji oraz efektywnego funkcjonowania poprzez pełną współpracę. Spełnia to oczekiwania pracowników, którzy wymagają i oczekują od swoich przełożonych, aby skutecznie reprezentowali ich potrzeby i interesy, zarówno wewnątrz jak i na zewnątrz zespołu.

Tradycyjne funkcje kierownicze przejmują członkowie zespołu /współpraca grupowa/. Rezygnuje się z funkcji nadzorczych na rzecz szkolenia /umiejętności szkolenia w zespole/. Poprzez grupowe rozwiązanie problemów następuje ułatwienie pracy i integracja wokół celów.

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Przykład sytuacyjny

Firma Swiss Catering Service

Firma Swiss Catering działa od siedmiu miesięcy. W tym czasie działalność była owocna. Właścicielka firmy, Marie de Fand urodziła się we Francji i studiowała przez wiele lat sztukę gotowania dopóki nie stała się mistrzem kucharskim. Pomimo, że Maria ze względu na swoje pochodzenie i zamożność nie musiała pracować, to chciała jednak zrobić coś wyjątkowego. Tym czymś miało być gotowanie niezwykłych potraw, gdyż zajęcie to bardzo lubiła. Po przybyciu do Ameryki, Maria postanowiła przystąpić do interesu polegającego na organizowaniu przyjęć w Dallas w Texasie. Bardzo lubiła Dallas i czuła, że w mieście tym jest rynek na działalność w jej stylu, czyli taką w której kładzie się nacisk na jakość żywności i sposób podawania jej. Maria powieliła europejskie podejście do interesu prowadzonego przez siebie i to głównie zadecydowało o sukcesie. Każda osoba zatrudniona przez nią musiała być nienagannie czysta i odpowiednio ubrana. nauczyła nawet swoich pracowników użytecznych zwrotów francuskich i wymagała od nich wykorzystania tych zwrotów w czasie obsługi gości. Wszystkie wina były importowane z Europy, ale uważała jednak żeby mięso pochodziło z Texasu. Jej ceny były odstraszające, ale wydawało się, że dla konsumentów nie ma to znaczenia. Utrzymywała ona tendencję do wzrostu cen, ale nie miało to znaczenia dla jej klientów. Potwierdzeniem tego faktu było to, że wzrostowi cen towarzyszył wzrost sprzedaży. Kiedy dobrzy klienci telefonowali do niej i pytali jaki rodzaj wina powinni podać w czasie małego zebrania, Marie wysyłała do ich domu kilka butelek właściwych win bez opłaty.

Marie nie reklamowała się. Ona nie wierzyła w reklamę i czuła, że najlepszą reklamą jest jej reputacja. To nic nie kosztowało lecz jedynie wymagało z jej strony i ze strony jej pracowników obsługi na wysokim poziomie. Na początku Marie sama gotowała wszystko. Zaczęła jedynie szkolić i nadzorować innych w sztuce. Próbowała ona zatrudnić swoich przyjaciół, kucharzy z Francji obiecując im świetne płace. Jej wysiłki zakończyły się niepowodzeniem. Stąd skoncentrowała uwagę na pracy z

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własnym, miejscowym personelem. Miała kilku pracowników, którzy odmówili nauki francuskiego więc musiała ich zwolnić. Na początku nie obawiała się zwalniać ludzi, gdyż wiedziała, że musi mieć perfekcyjną kadrę. W pewnym momencie rozwinęła jednak załogę w pełnym wymiarze czasu pracy i zaczęła obawiać się związków zawodowych. Marie miała grupę ludzi, nadzorujących pracę kucharzy, którzy mogli obiecać, że zrobią coś zgodnie z jej życzeniem, zaś gdy przystępowali do pracy wprowadzali swoje zmiany. Miała rownież problemy z niektórymi kelnerami, którzy usiłowali zaprzyjaźnić się z jej gośćmi. Wiadomo było bowiem, że niektórzy z jej młodszych pracowników mogli używać swojego czasu próbując zaprzyjaźnić się z niektórymi z gości. Marie nie miała programu premiowania osób przez siebie zatrudnionych. Jej pracownicy byli wynagrodzani kwotą 10 $ za godzinę, a rachunek dla klienta był rachunkiem całkowitym nie zawierającym prowizji na "napiwki". Czasami klienci dawali napiwki kelnerom, ale Marie podkreślała, że są oni zobligowani do zapłaty rachunku, a napiwek nie był konieczny. Kelnerzy nie lubili tego, gdyż przywykli do innego systemu. Marie miała rownież problem z wyglądem zewnętrznym pracowników. Obowiązkiem każdego kierownika było sprawdzać wygląd zewnętrzny pracownika, czyli być pewnym, że każdy pracownik ma wszystko pod ręką i nie zapomniał białych rękawiczek. każdy kierownik był zobowiązany dostarczyć materiały do czyszczenia ubrań, butów i rękawic. Ta polityka nie była realizowana i Marie otrzymywała skargi.

Zaczęły się również pojawiać skargi, że posiłki nie były gorące i że kelnerzy przyspieszali posiłki. Skarżono się również, że pracownicy przygotowujący drinki nie mieszali ich właściwie lub świadomie usiłowali upić niektórych klientów. W jednym przypadku klient relacjonowal, że gospodarz przyjęcia był pijany już 30 minut po jego rozpoczęciu.

Marie usiłowała uporządkować sprawy z pracownikami, ale wydało się , że oni nie chcieli pracować z nią. Mniej klopotów miała wprawdzie z kobietami, ale potrzebowała mężczyzn by zrównoważyć załogę. Miała również problemy z kuchnią. W jednym przypadku bardzo ważny klient z biznesu olejowego zamówił Beef Willington dla wszystkich gości, a w zamian za to otrzymał "Aroz con Polo" /ryż z kurczakiem/.

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Ciastko, które było specjalnie przygotowane przez Marie zostało pomylone z małym ciastkiem z napisem "Happy Birthday Milagros". Cała ta sprawa była kompletną klęską i wprowadziła Marie w stan ogromnego zdenerwowania. Było oczywistym, że kierownik mógł pomylić ciastka, ale nie mogła zrozumieć zamiany dań, jako że w tym dniu nie było żadnych zamówień na kuchnie hiszpańską. Pomimo, że gościom posiłek smakował, Marie przeprosiła ich i nie obciążyła za zorganizowanie przyjęcia. Po tych wszystkich wypadkach Marie zrozumiała, że coś musi się zmienić. Była zdeterminowana, wziąć właściwych ludzi, do zespołu usługowego. Jeden z przyjaciół powiedział jej, że powinna zdecydować się na system podziału zysku, ale ona zdecydowanie odrzuciła tę wskazówkę. W końcu kierownicy, spotkali się z Marie i powiedzieli jej, że nie mogą znieść sposobu w jaki są przez nią traktowani. Oni czuli się urażeni z powodu, jej krzyków i obsesyjnej dbałości o czystość. Nie akceptowali również programu wynagradzania, a w szczególności polityki dotyczącej "napiwków". Skarżyli się na zbyt długi czas pracy. Jeżeli ona nie zmieni się to ostrzegli, że opuszczą firmę w najmniej oczekiwanym momencie. Marie była wzburzona. Nigdy nie miała pracowników rozmawiających z nią w ten sposób i w dodatku nie chciała pokazać swojej słabości, dopóki nie otrzyma porady. Powiedziała im, że wróci do nich i podziękowała za szczerość. Czuła, że wszystko można tak zmienić aby dać im satysfakcję. Marie nie zrobiła nic w tej sprawie przez tydzień. Któregoś wieczoru miała telefon na swój numer prywatny, ktory dała jedynie najważniejszym klientom. Wydawało się, że T.R. Sanders był wściekły, gdyż na przyjęciu, które zorganizował dla swojej córki przygotowujący drinki byli nieprzyjemni, nieokrzesani i mieszali zamówienia. Jego małej córce Mandy Lou, która nie pije, podano Skirely Temples z dżinem. Kelnerzy zaczęli wymyślać niektórym gościom i kiedy Sanders zwrócił im uwagę jeden z kelnerów podszedł i wylał cały talerz zupy na jego spodnie. Przyjęcie było więc całkowitą klęską. Sanders zagroził podaniem do Sądu sprawy upicia jego córki i innych upokorzeń, które przyszło mu znosić w czasie przyjęcia. Zamierzał powiedzieć wszystkim w Dallas i Worth, że nie powinni kontynuować korzystania z usług Marie dopóki nie powróci w swojej działalności do obowiązujących standartów. Marie usprawiedliwiała sie przed Sandersem. Kiedy

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opowiedziała mu o wszystkich swoich problemach zdecydował się wyciszyć sprawę. W końcu zaoferował on nawet Marie wysłanie kilku swoich ekspertów z zakresu zarządzania, żeby sprawdzili co mogliby zrobić, aby jej pomóc. Sander dodał "Marie my lubimy ciebie i potrzebujemy twojego typu usług w Dallas ale nie w tej wersji, którą mieliśmy dzisiejszego wieczoru". Powiedział również "zrobię wszystko co jest w mojej mocy. żeby pomóc nawet, gdy będę musiał wysłać moich menadżerów aby uporządkowali twój interes. Jeżeli to nie pomoże kupię ten interes od ciebie za każdą cenę i ciebie uczynię prezesem". W ten sposób Sanders zapewnił Marie, że nie ma powodów do zmartwienia. Wszystko to zmusiło jednak Marie do dojścia do porozumienia z załogą, która teraz liczyła łącznie z kucharzami 254 osoby.

Pytania

1) Jak myślisz, dlaczego interes Marie był tylko chwilowo dobrym interesem?

2) Czy myślisz, ze jej firma rozwinęła się za szybko? Myślisz, że powinna rozwijać się wolniej? Dlaczego?

3) Jak myślisz, co było głównym problemem Marie? Dlaczego jej kierownicy i inni pracownicy nie chcieli robić tego o co ona ich prosiła? Czy to było mądre z jej strony, aby wymagać od pracowników nauki zwrotów francuskich? Czy myślisz, że Marie miała rację sprawdzając zapach pracowników?

4) Czy myślisz, że Marie potrzebuje lepszego programu szkoleniowego dla swoich pracowników? Jakie inne rodzaje programów zalecałbyś?

5) Czy myślisz, że program Marie dotyczący napiwków był satysfakcjonujący czy też, że powinna przygotować inne programy?

6) Jakie zmiany powinny być wprowadzone do systemu wynagrodzania?

7) Co powinna Marie zrobić z kucharzami? Czy powinna sprowadzić z Europy mistrza kucharskiego, bez względu na

cenę jaką przyszłoby za to zapłacić? Jakie jest twoje podejście do tego problemu? Czy Marie powinna spędzać więcej czasu w kuchni? Czy myślisz, że w krótkim okresie czasu Marie może wyszkolić kucharzy tak dobrych jak kucharze z Francji.

8) Jakie inne wskazówki miałbyś dla Marie nie tylko po to by wzmocniła swoją organizację, ale również po to aby odzyskała tych klientów, którzy byli rozczarowani jej usługami.

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OCZEKIWANIA PERSONELU

1. Dobre zarobki
2. Ciągłość zatrudnienia
3. Racjonalne godziny pracy
4. Przyjemne i bezpieczne warunki pracy
5. Poczucie że ich sytuacja się polepsza
6. Odczucie współpracy
7. Szacunek
8. Możliwość doskonalenia
9. Możliwość awansu

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OCZEKIWANIA PRACODAWCY

1. Odpowiednie kwalifikacje
2. Doświadczenia z poprzednich miejsc pracy
3. Referencje
4. Umiejętności i zdolności
5. Zdrowie i młodość
6. Zainteresowanie pracą
7. Zaangażowanie
8. Dyspozycyjność
9. Solidność
10. Punktualność
11. Uprzejmość

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Przyklad tabeli ocen w kwalifikowaniu według oceny punktowej

Rodzaj wymagań	Rejestr wymagań		Liczba punktów dla wymagań									
	Wiadomości	Wykształcenie	0	1	2	3	4	5	6	~~7~~	8	9
		Doświadczenie	0	1	2	3	4	5	~~6~~	7	8	
		Zdolność rozumowania	0	1	2	3	4	~~5~~	6	7		
	Obciążenie psychiczne	Uwaga	0	1	2	~~3~~	4					
		Myślenie	0	1	2	~~3~~	4	5				
	Zręczność	Zręczność	0	1	2	3	4	~~5~~	6	7		
		Sprawność fizyczna	0	1	2	~~3~~	4	5				
	Obciążenie fizyczne	Dynamiczna praca mięśni	0	1	2	~~3~~	4					
		Statyczna praca mięśni	0	1	~~2~~	3	4	5	6			
		Jednostronna praca mięśni	0	1	2	3	~~4~~	5				
	Odpowiedzialność	Za siebie	0	1	2	~~3~~	4	5	7			
		Za inne osoby	0	1	~~2~~	3	4	5	6			
		Za funkcję, strukturę, proces	0	1	2	~~3~~	4	5				
	Warunki otoczenia	Klimat	~~0~~	1	2	3						
		Halas	0	~~1~~	2							
		Oświetlenie	0	~~1~~	2							
		Drgania	0	~~1~~	2							
		Kurz	~~0~~	1	2	3						
		Wilgoć	~~0~~	1	2	3						
		Olej, tłuszcz, brud	0	1	~~2~~	3						
		Gazy, pary	~~0~~	1	2							
		Odzież ochronna	~~0~~	1	2							
		Mały prestiż społeczny zawodu	~~0~~	1	2	3	4					

1. Kierownicy powinni czynnie i świadomie motywować podwładnych.
2. Kierownicy powinni znać własne silne i słabe strony, zanim podejmą próby ich modyfikowania u innych.
3. Kierownicy muszą dostrzegać, że pracownicy mają różne motywacje i uzdolnienia.
4. Nagrody powinny wiązać się z efektywnością, a nie ze stażem czy innymi względami nie związanymi z zasługami.
5. Zadania należy projektować tak, aby stawiały wyzwania i umożliwiały różnorodność. Podwładni muszą jasno rozumieć, czego się od nich oczekuje.
6. Kierownicy powinni pielęgnować kulturę organizacji, zorientowaną na efektywność.
7. Kierownicy powinni przebywać blisko podwładnych i zaradzać problemom w miarę ich powstawania.
8. Należy dążyć do czynnego współudziału pracowników w zwiększaniu wydajności organizacji; pracownicy są przecież także zainteresowani w jej powodzeniu.

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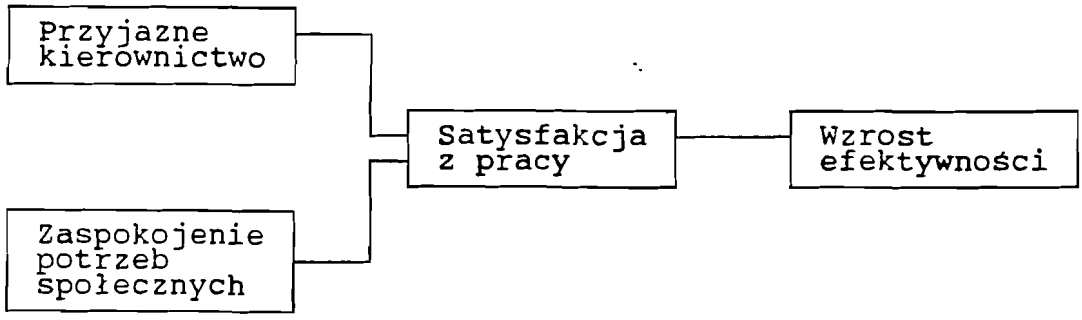
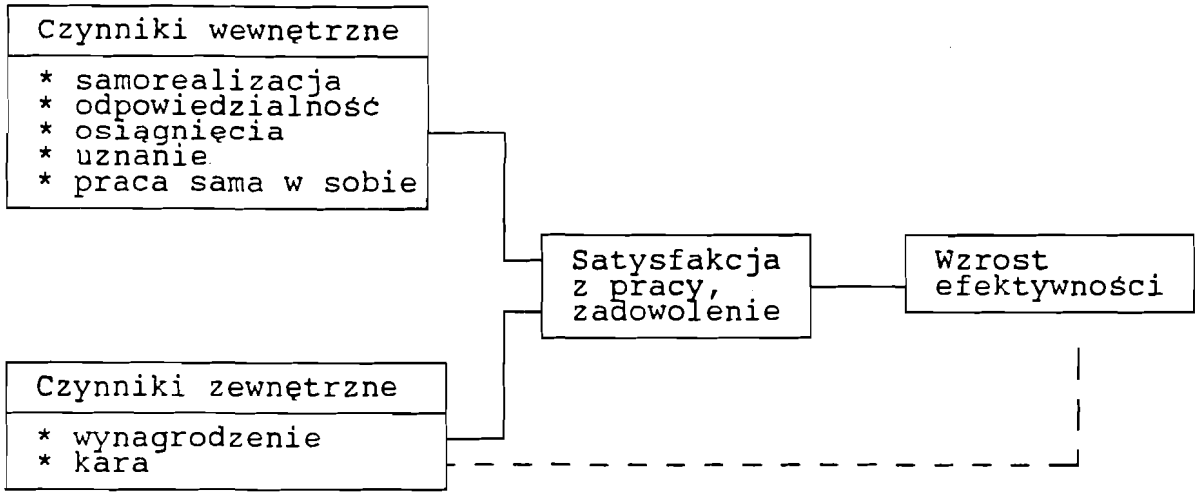
MODELE MOTYWACJI

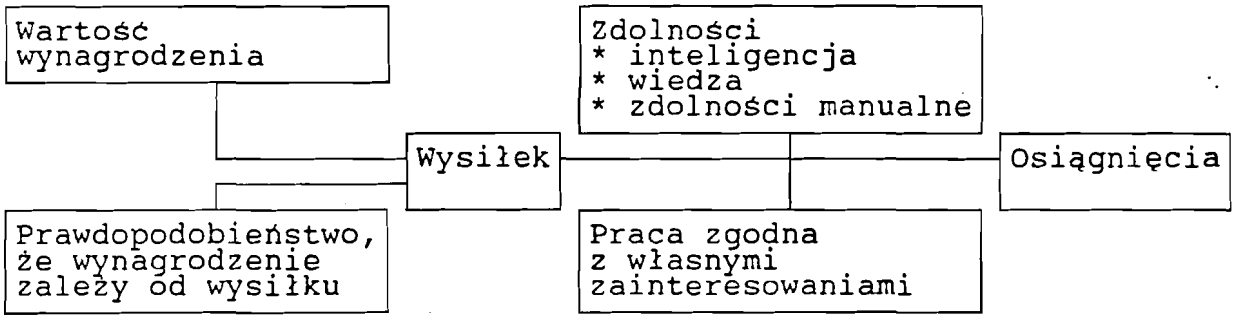
MODEL MOTYWACJI W KONCEPCJI "CZŁOWIEKA SPOŁECZNEGO"



MODEL MOTYWACJI W KONCEPCJI "CZŁOWIEKA SAMOREALIZUJĄCEGO SIĘ"



MODEL MOTYWACJI PORTERA I LAWLERA



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Opracowanie własnej polityki personalnej

Podstawą dobrego zarządzania zasobami ludzkimi jest posiadanie koncepcji polityki socjalnej i systemu motywacyjnego jakie twoja firma może zaproponować pracownikom przed podjęciem pracy.

Odpowiedzi na pytania pomogą ci określić prawidłową dla twojej firmy politykę ~~kredytową~~ kadrowej.

1. WYPISZ CECHY, których oczekujesz od twoich pracowników w kolejności od najważniejszej do najmniej ważnej i nadaj im wagi w skali od 1 do 10.
2. Sporządzono na podstawie BADAŃ SOCJOLOGICZNYCH listę czynników, które mają wpływ na postawę pracownika, szeregując je w kolejności od najważniejszej dla pracownika począwszy. Zaznacz /x/ te pozycje, które zaproponujesz twoim przyszłym pracownikom. Wyjaśnij, jak to zrobisz?

Czynnik	Czy zaproponujesz ?	Jak ?
1. Bezpieczeństwo zatrudnienia		
2. Zainteresowanie pracą		
3. Możliwość awansowania		
4. Uznanie ze strony zarządu firmy		
5. Wysoka pozycja firmy na rynku		
6. Różnorodność pracy		
7. Wysokość wynagrodzenia		
8. Niezależność, samodzielność		
9. Społeczne aspekty pracy		
10. Warunki pracy		
11. Porozumiewanie się		
12. Godziny pracy		
13. Trudności /jakie?/		
14. Korzyści /jakie?/		

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ZASADY USTALANIA MOTYWACYJNYCH SYSTEMÓW WYNAGRODZEŃ

1. Uwarunkowania organizacyjne i środowiskowe
   - dostępność siły roboczej na rynku pracy
   - rynkowe ceny siły roboczej
   - wymagania prawne /np. płace minimalne/
   - możliwości płatnicze firmy
   - praktyki przemysłowe
   - filozofia organizacji /szkolić i rozwijać umiejętności czy pozyskiwać pracowników wykwalifikowanych/
   - zakres działania Związków Zawodowych
2. Techniki organizacyjne
   - analiza pracy
   - ocena pracy
   - wartość pracy
   - organizacja stanowiska pracy
   - system wynagrodzeń /regulamin/
   - badanie motywacyjnej roli płacy
3. Rezultaty
   - struktura płac
   - zgodność wewnętrzna /sprawiedliwość/
   - zgodność zewnętrzna /poziom ceny rynkowej/
   - zgodność indywidualna /akceptacja pracowników/

Wzbogacanie treści pracy i jego motywacyjne efekty

Cechy pionowej strukturyzacji pracy	Czynniki motywacyjne
Przekazanie części nadzoru wraz z zakresem odpowiedzialności	Odpowiedzialność, potwierdzenie kwalifikacji i uzdolnień
Zwiększenie indywidualnej odpowiedzialności za zadania	Uznanie i odpowiedzialność
Powierzenie pracownikowi szerszej, wyodrębnionej części zadania	Samorealizacja, uznanie, odpowiedzialność
Zwiększenie samodzielności pracownika i jego autorytetu	Samorealizacja, uznanie, odpowiedzialność
Okresowa samoocena pracownika dla zespołu	Podwyższenie osobistego autorytetu pracownika
Podejmowanie innowacyjnych i bardziej złożonych zadań	Rozwój pracownika i podwyższenie kwalifikacji
Formułowanie zindywidualizowanych specjalistycznych	Rozwój, awans, poczucie odpowiedzialności

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Proces pracy	Wejście	Transformacja	Wyjście
Przedmiot oceny	Zdolności pracownika	Zachowania	Wyniki pracy
Koncepcja	Według cech	Według czynności	Według wyników

Koncepcje oceny pracowników

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1. **Koncepcja oceny według cech (wejście)**

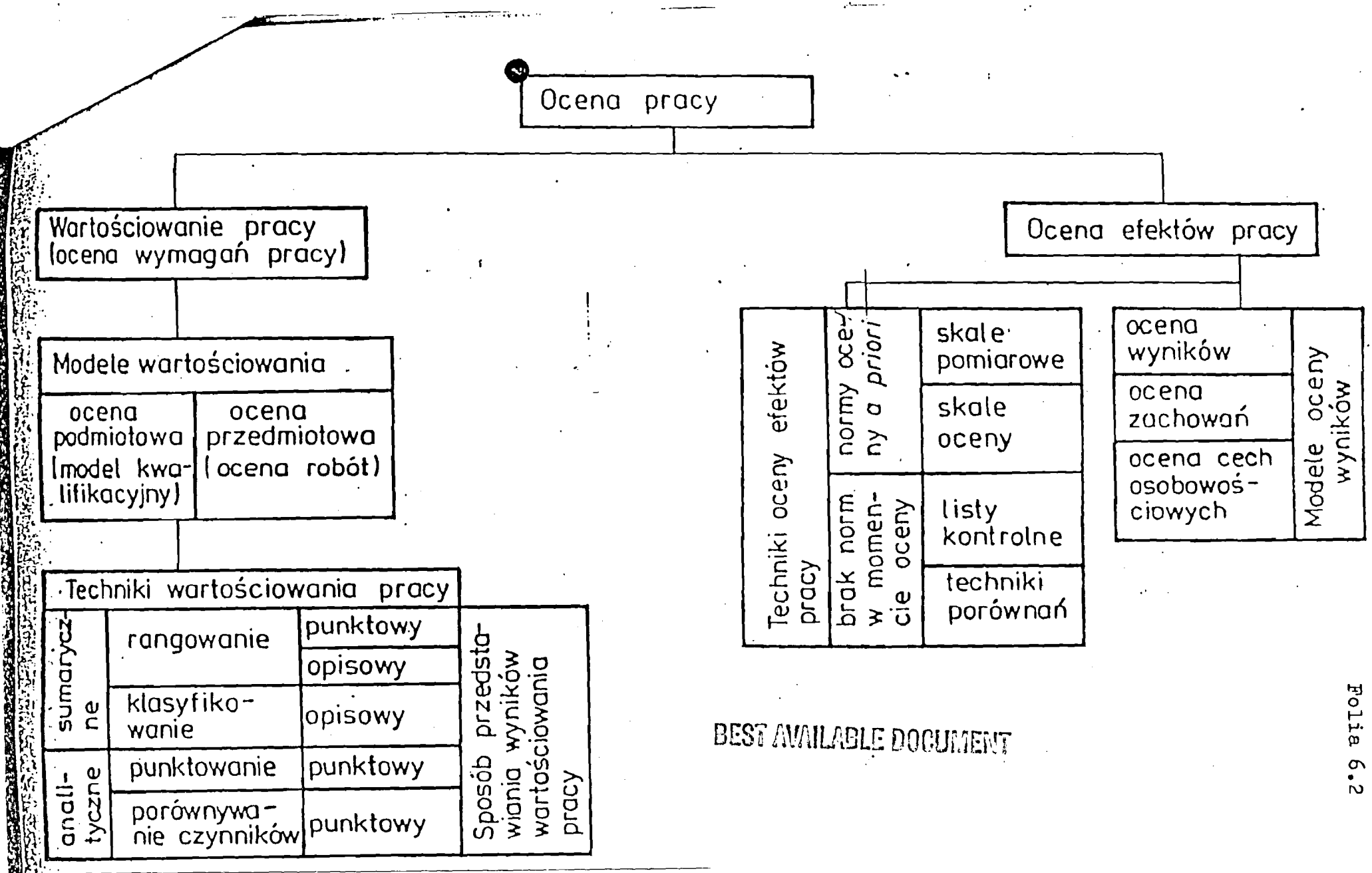
W centrum oceny znajduje się osobowość pracownika. Interesuje nas tu przede wszystkim istnienie cech uważanych za ważne (np. lojalność, dążenie do dominacji, inteligencja, kreatywność). Cechy traktowane są przy tym jako uniwersalne i generalne źródła postaw.

2. **Koncepcja oceny według czynności (transformacja)**

Należy ocenić „co" i „jak" robi dana osoba, tzn. sposób wykonywania czynności. Wychodząc od specyfiki wymagań należy ocenić, na ile zachowanie odpowiada tym wymaganiom. Oceniana jest więc nie osobowość jako taka, lecz konkretne zachowanie się obserwowane w pracy.

3. **Koncepcja oceny według wyniku (wyjście)**

Przedmiotem oceny jest rezultat czynności, oceniany na podstawie z góry ustalonych celów. W centrum uwagi znajduje się więc to, co pracownik rzeczywiście osiągnął.



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Katalog pytań do oceny rozmowy oceniającej

Wstęp

1. Czy przełożony wytworzył otwarty i akceptowalny klimat?
2. Czy była zgodność co do celu i przebiegu wywiadu?
3. Czy obie strony były jednakowo dobrze przygotowane?

W czasie wywiadu

4. W jakiej mierze przełożony próbował rzeczywiście zrozumieć swego pracownika?
5. Czy zagadnienia ogólne postawiono na początku?
6. Czy nawiązanie przełożonego do określonych sytuacji było jasne i właściwe?
7. Czy przełożony przygotował się? Zwłaszcza co do odczuć i systemu wartości podwładnego?
8. Czy podwładny oponował wobec przełożonego i czy konfrontował go z innymi wyobrażeniami?
9. Czy wywiad zakończył się wzajemnym zrozumieniem co do problemów i koncepcji poprawy?

Wyniki

10. Czy rozmowa motywowała podwładnego?
11. Czy wymiana zdań doprowadziła do lepszych relacji?
12. Czy po ukończeniu rozmowy podwładny miał jasny obraz oceny?
13. Czy przełożony doszedł do bardziej sprawiedliwej oceny swego podwładnego?
14. Czy dowiedział się czegoś nowego o swym podwładnym?
15. Czy podwładny dowiedział się czegoś nowego o swym przełożonym i ciążącej na nim presji?
16. Czy podwładny posiada jasne wyobrażenie tego, co należy zrobić dla poprawy pracy?

Folia 6.3

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OCENA WYDAJNOSCI

Folia 6.4

Pracownik .....
Stanowisko .....

WYDAJNOSC	OCENY 1	2	3	4	UWAGI
Ilość wykonanej pracy	....	....	....	....	_____
Dokładność w pracy	....	....	....	....	_____
Szybkość działania	....	....	....	....	_____
Opanowanie metod działania stosowanych w firmie	....	....	....	....	_____
Zaangażowanie w pracy	....	....	....	....	_____
Umiejętność rozwiązywania problemów dotyczących:					
* wykonywanych zadań	....	....	....	....	_____
* integracji w firmie	....	....	....	....	_____
* inne	....	....	....	....	_____
Jakość decyzji	....	....	....	....	_____
Planowanie pracy	....	....	....	....	_____
Dotrzymywanie terminów	....	....	....	....	_____

CECHY CHARAKTERU

Stosunek do:					
* zwierzchników	....	....	....	....	_____
* podwładnych	....	....	....	....	_____
* klientów	....	....	....	....	_____

Inne cechy: punktualność, przestrzeganie porządku, przestrzeganie przepisów, współpraca z kolegami, wypełniania swoich obowiązków, inicjatywa i niezalezność, lojalność, grzeczność.

_____ _____

Podpis osoby oceniającej Data

KARTA OCENY STANOWISKA .....

1. Kto przeprowadził ocenę (stanowisko, nazwisko i imię)

_____

2. Oceniany (stanowisko, nazwisko i imię)

_____

3. Data ostatniej oceny i wyniki: _____
4. Data aktualnej oceny i wynik: _____
5. Stosowana skala ocen: 1 - niedostateczny, 2 - mierny, 3 - dostateczny, 4 - dobry, 5 - bardzo dobry, 6 - wybitny

Oceny negatywne	Lp.	Oceniane cechy:	Oceny pozytywne
2.1.	1.	Kwalifikacje - przygotowanie do zawodu	3.4.5.6.
2.1.	2.	Wydajność pracy - sprawność, efektywność, produktywność	3.4.5.6.
2.1.	3.	Jakość pracy - solidność, staranność	3.4.5.6.
2.1.	4.	Pomysłowość - inicjatywa, radzenie sobie w nowych sytuacjach	3.4.5.6.
2.1.	5.	Sprawność - łatwość uczenia się nowych metod	3.4.5.6.
2.1.	6.	Odpowiedzialność - terminowość, pewność	3.4.5.6.
2.1.	7.	Zdyscyplinowanie - subordynacja, obowiązkowość	3.4.5.6.
2.1.	8.	Zrównoważenie - spokój, opanowanie w sytuacjach trudnych	3.4.5.6.
2.1.	9.	Koleżeńskość - życzliwość, chęć udzielania pomocy innym	3.4.5.6.
suma ocen: $\frac{\Sigma \text{ocen } 2.1.}{\text{ilość cech } (9)}$ = = przeciętna ocen negatywnych		Przydatność dla firmy obliczenie wyników Σprzeciętna ocen pozytywnych — —Σ przeciętna ocen negatywnych = = przeciętna ocen cech pracowniczych	suma ocen: $\frac{\Sigma \text{ocen } 3.4.5.6.}{\text{ilość cech } (9)}$ = = przeciętna ocen pozytywnych

BŁĘDY OCENY

BŁĄD OSLEPIENIA

OCENIAJĄCY SUGERUJE SIĘ JEDNĄ CECHĄ (DODATNIĄ LUB UJEMNĄ) I UOGÓLNIA OCENĘ TZN. OCENA WSZYSTKICH WYMIARÓW WYPADA MNIEJ WIĘCEJ RÓWNO. PRZYKŁAD: WRAŻENIE "WYSOKIEJ INTELIGENCJI" PRZYĆMIEWA WSZYSTKIE INNE ASPEKTY ZACHOWANIA, JAK NP. PUNKTUALNOŚĆ LUB NIEZAWODNOŚĆ TZN. OCENIANE SĄ ONE TAKŻE DODATNIO, CHOĆ Z PUNKTU WIDZENIA FAKTYCZNEGO ZACHOWANIA NALEŻAŁOBY JE RACZEJ OCENIĆ PRZECIĘTNIE.

BŁĄD POBŁAŻLIWOŚCI

OCENIAJĄCY Z REGUŁY WYDAJE ŁAGODNE OCENY, NIEZALEŻNIE OD FAKTYCZNYCH OSIĄGNIĘĆ OCENIANEGO. BADANIA EMPIRYCZNE WYKAZAŁY, IŻ EFEKT POBŁAŻLIWOŚCI SZCZEGÓLNIE OSTRO WYSTĘPUJE WTEDY, GDY OCENA JEST SPORZĄDZANA W CELU AWANSU. PRZECIWIENSTWEM TEGO BŁĘDU JEST BŁĄD SUROWOŚCI.

TENDENCJA ŚREDNIEJ

OCENIAJĄCY KLASYFIKUJE WSZYSTKICH OCENIANYCH NA ŚREDNIEJ POZYCJI; NIE JEST ON GOTOWY DO JASNEGO RÓŻNICOWANIA POSZCZEGÓLNYCH OSIĄGNIĘĆ.

EFEKT HIERARCHII

OCENA WYPADA TYM LEPIEJ, IM WYŻSZA JEST HIERARCHICZNA RANGA OCENIANEGO. JEST TO ZJAWISKO SPOTYKANE PRAWIE WE WSZYSTKICH ORGANIZACJACH A SWÓJ POCZĄTEK BIERZE CHYBA Z DĄŻENIA DO STWORZENIA SPÓJNOŚCI MIĘDZY STATUSEM A OCENĄ.

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GALLAGHERA ZASADY DOBREJ ORGANIZACJI

- Sformułuj w formie pisemnej i przedstaw wszystkim jasno określone cele.
- Na czele działów postaw ekspertów.
- Wyeliminuj nepotyzm i faworyzowanie.
- Przekaż decyzje na możliwie najniższy szczebel.
- Zapewnij jedność zarządzania.
- Określ dokładnie, kto jest odpowiedzialny za wykonanie każdego zadania.
- Unikaj zbytniego rozproszenia zarządzania, utrzymaj rozpiętość struktury w rozsądnych granicach.
- Unikaj podwójnego zwierzchnictwa.
- W przypadku zdecentralizowanego podejmowania decyzji scentralizuj kontrolę.
- Zapewnij równowagę organizacyjną.
- Przygotuj charakterystyki stanowisk podkreślające oczekiwane rezultaty.
- Wyraźnie ustal zasady funkcjonowania firmy i regularnie aktualizuj je.
- Stwórz możliwość rozwijania się nieformalnej struktury organizacyjnej i staraj się ją poznać.
- Dokonaj integracji celów osobistych — twoich własnych i pracowników — z celami organizacji.
- Wyznacz swojego następcę.

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KONTROLA CZASU

MARNOWANIE CZASU

* NIEZAPOWIEDZIANE WIZYTY
* PRÓBY PRZEPROWADZANIA ROZMÓW TELEFONICZNYCH
* NIEPRZEWIDZIANE WYDARZENIA
* SYTUACJE KRYZYSOWE
* BRAK PLANOWANIA ORGANIZACYJNEGO DOTYCZĄCEGO CELÓW, PRIORYTETÓW
* NIEUPORZĄDKOWANE PRZERWY W PRACY
* DEZORGANIZACJA
* ZADANIA, KTÓRE ZAJĘŁY WIĘCEJ CZASU NIŻ PIERWOTNIE ZAKŁADANO
* ROZDRABNIANIE SIĘ NA BŁAHO STKACH
* BŁĘDY W ORGANIZACJI PRACY
* ZŁE, OPÓŹNIONE, NIEPOPRAWNE, NIEKOMPETENTNE INFORMACJE
* NIEZDECYDOWANIE I ZWLEKANIE
* NIEUMIEJĘTNOŚĆ POWIEDZENIA "NIE"
* ZMĘCZENIE
* OBAWA PRZED OPINIĄ INNYCH
* BEZPRODUKTYWNA PRACA

OSZCZĘDNOŚĆ CZASU

* PRZECHOWYWANIE NOTATEK
* PRZEPROWADZANIE ROZMÓW TELEFONICZNYCH WÓWCZAS, GDY WIADOMO, ŻE ROZMÓWCA JEST WOLNY
* USTALENIE DOBREGO SYSTEMU REJESTRACJI INFORMACJI
* REZYGNACJA Z ODKŁADANIA SPRÁW NA PÓŹNIEJ
* PEWNOŚĆ SIEBIE
* PLANOWANIE (KRÓTKO- I DŁUGOOKRESOWE) I REALIZACJA PLANÓW
* PRZENOSZENIE CZĘŚCI ZADAŃ NA INNYCH
* REALISTYCZNE PODEJŚCIE DO ZADAŃ
* ELASTYCZNOŚĆ

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Samoocena organizacji pracy własnej kierownika

	Prawie nigdy	Czasami	Często	Prawie zawsze
1. Mam zapiski dotyczące większej części mego dnia roboczego.				
2. Najmniej interesujące mnie zajęcie odsuwam do czasu osiągnięcia szczytu swej energii.				
3. Deleguję te uprawnienia, z których ktoś inny może zrobić tytek tak samo dobrze, jak ja.				
4. Mam czas na to, by robić to, co chcę i to, co powinienem zrobić.				
5. Analizuję przebieg swej pracy po to, by wyeliminować z niej niektóre czynności.				
6. Zaczynam od tych przedsięwzięć, które dają wyniki w krótkim czasie, przed zadaniami długofalowymi.				
7. Mój szef zleca mi więcej pracy, niż sam sądzi, że będę w stanie wykonać.				
8. Zajmuję się więcej czynnościami bieżącymi (telefony, korespondencja) niż pracą planistyczną.				
9. Zastanawiam się nad jakością swej pracy i staram się ją ulepszać.				
10. Wydzielam zadania priorytetowe, kierując się ważnością ich celu.				

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Instrukcja

1. Postaw krzyżyk w rubryce, która najlepiej charakteryzuje twoje postępowanie w pracy.

2. Spójrz do „klucza", który zawiera punktację za poszczególne odpowiedzi i postaw odpowiednią liczbę punktów za udzielone przez siebie odpowiedzi.

3. Podlicz sumę punktów i spójrz na wyniki z „klucza", które pozwolą ci ocenić organizację własnej pracy.

Klucz do samooceny organizacji pracy własnej

Pozycja	Prawie nigdy	Czasami	Często	Prawie zawsze
1	2	3	2	1
2	0	1	2	3
3	0	1	2	3
4	0	1	2	3
5	2	3	2	1
6	2	3	2	1
7	3	2	1	0
8	3	2	1	0
9	1	2	3	2
10	0	1	2	3

Po udzieleniu odpowiedzi kierownik powinien porównać swoje odpowiedzi z sugerowanymi „najlepszymi" odpowiedziami.

Wynik powyżej 25 — czas pracy użytkowany jest właściwie; poniżej 15 — pracujesz mało efektywnie, konieczne są szybkie usprawnienia w organizacji pracy własnej.

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Reguły stosowania technik modyfikowania zachowań

Reguła 1 *Nie nagradzaj wszystkich jednakowo*

ABY NAGRODY SKUTECZNIE WZMACNIAŁY ZACHOWANIA, POWINNY WYNIKAĆ Z DOKONAŃ. RÓWNE NAGRODY DLA WSZYSTKICH W EFEKCIE WZMACNIAJĄ SŁABE LUB PRZECIĘTNE WYNIKI, A IGNORUJĄ WYBITNE

Reguła 2 *Pamiętaj, że brak reakcji również może zmieniać zachowania*

KIEROWNICY WPŁYWAJĄ NA PODWŁADNYCH TYM, CZEGO NIE ROBIĄ, PODOBNIE JAK TYM, CO ROBIĄ. NA PRZYKŁAD BRAK POCHWAŁY DLA PODWŁADNEGO, GDY NA TO ZASŁUGUJE, MOŻE SPOWODOWAĆ, ŻE NASTĘPNYM RAZEM JEGO WYNIKI BĘDĄ SŁABE

Reguła 3 *Nie zapomnij powiedzieć podwładnym, co mogą zrobić, aby uzyskać nagrodę*

USTALENIE NORMY EFEKTYWNOŚCI POZWALA PRACOWNIKOWI NA ZROZUMIENIE, CO POWINIEN ZROBIĆ, ABY OTRZYMAĆ NAGRODĘ. UMOŻLIWIA MU TO ZMIANĘ JEGO WZORCÓW PRACY.

Reguła 4 *Powiedz podwładnym co robią źle*

JEŚLI KIEROWNIK POWSTRZYMUJE SIĘ OD NAGRADZANIA PRACOWNIKA BEZ WSKAZANIA, DLACZEGO NIE UZYSKAŁ NAGRODY, PRACOWNIK NIE BĘDZIE WIEDZIAŁ, JAKIE ZACHOWANIE KIEROWNIK UWAŻA ZA NIEPOŻĄDANE.

Reguła 5 *Nie udzielaj kary w obecności innych*

PUBLICZNA NAGANA UPOKARZA PRACOWNIKA I MOŻE WYWOŁAĆ NIECHĘĆ U WSZYSTKICH CZŁONKÓW GRUPY ROBOCZEJ WOBEC KIEROWNIKA.

Reguła 6 *Bądź sprawiedliwy*

NALEŻY DAWAĆ PODWŁADNYM TAKIE NAGRODY, NA JAKIE ZASŁUGUJĄ. NIEDOSTATECZNE LUB NADMIERNE NAGRADZANIE PODWŁADNYCH ZMNIEJSZA WZMACNIAJĄCY EFEKT NAGRÓD.

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Siatka kierownicza

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Troska kierownika o ludzi

Duża 9

8

7

6

5

4

3

2

1 Mała

Kierowanie klubowe – 1,9

Produkcja ma znaczenie uboczne wobec dobrych stosunków. Kierownik odpowiada głównie za ustanowienie harmonijnych stosunków między ludźmi oraz stworzenie przyjemnej i bezpiecznej atmosfery pracy

Kierowanie zespołowe – 9,9

Produkcja jest wynikiem integracji zadań i potrzeb ludzkich. Można osiągnąć zarówno dobre stosunki, jak i wysoką produkcję, a kierownik odpowiada głównie za efektywną produkcję przez uczestnictwo oraz zaangażowanie ludzi i ich pomysłów

Kierowanie zrównoważone – 5,5

Celem jest równowaga między wysoką produkcją i dobrymi stosunkami międzyludzkimi. Głównym zadaniem kierownika jest znalezienie złotego środka, aby osiągnąć rozsądne rozmiary produkcji bez zniszczenia morale

Kierowanie zubożone – 1,1

Wysoka produkcja i zdrowe stosunki pozostają w sprzeczności, a zadaniem kierownika jest nie dać uwikłać się w ten konflikt. Odpowiada on raczej za zachowanie neutralności i dopilnowanie przestrzegania procedur ustalonych w przeszłości

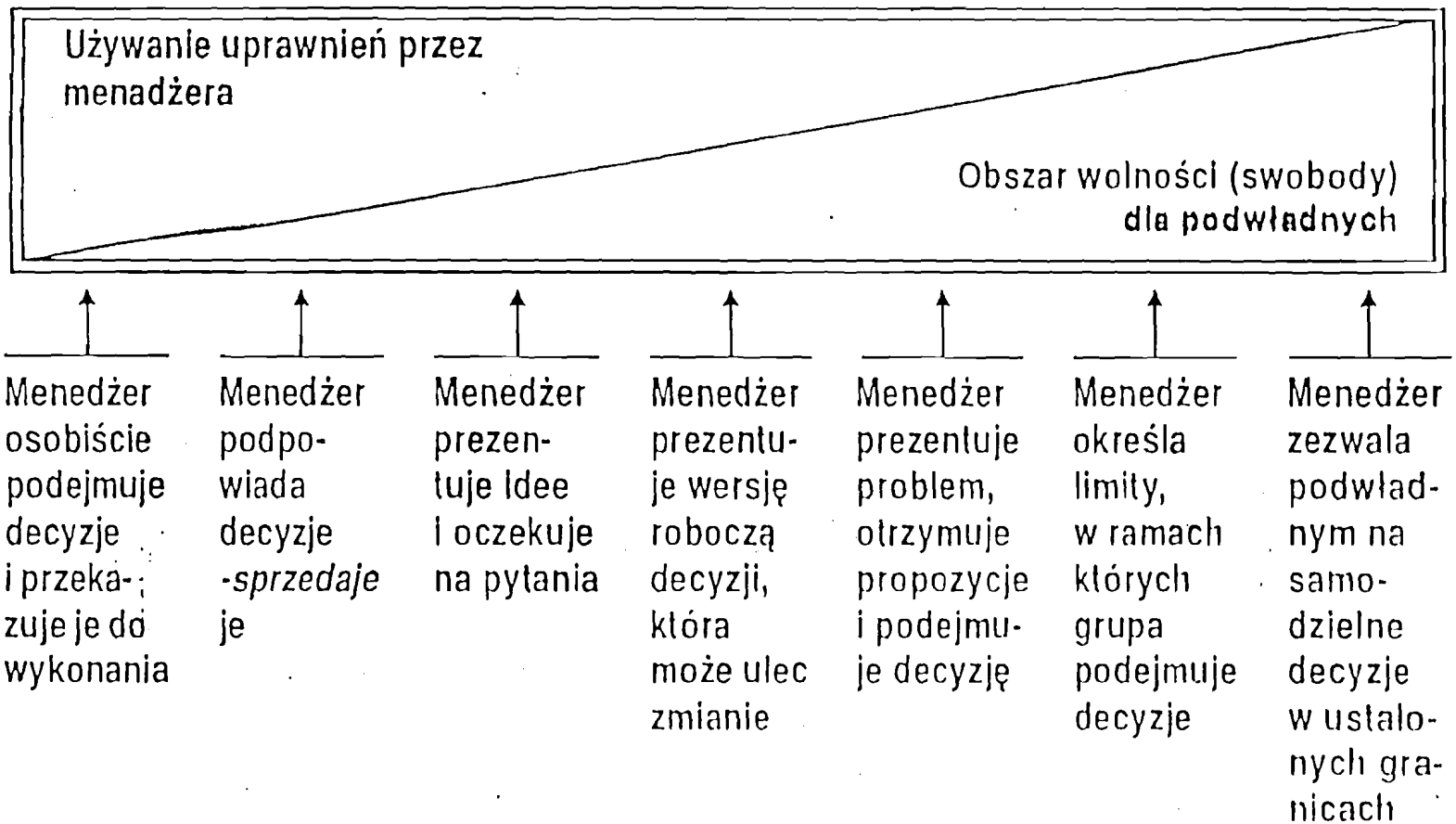
Kierowanie realizacją zadań – 9,1

Dobre stosunki mają znaczenie uboczne wobec wysokiej produkcji. Kierownik odpowiada głównie za dopilnowanie realizacji celów produkcyjnych przez planowanie, kierowanie i kontrolę całej pracy

1 2 3 4 5 6 7 8 9

Mała — Troska kierownika o produkcję — Duża

Styl kierowania a udział pracowników w procesach decyzyjnych



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STOPNIE DELEGOWANIA UPRAWNIEŃ

1. Rozpoznaj sytuację - przedstaw mi fakty. Ja zadecyduję co należy robić.
2. Przedstaw mi możliwe warianty decyzji oraz argumenty za i przeciw każdemu z nich. Ja zadecyduję, co wybrać.
3. Wskaż mi najwłaściwszy twoim zdaniem wariant działania Wezmę to pod uwagę przy podejmowaniu decyzji.
4. Powiadom mnie, co zamierzasz zrobić. Wstrzymaj się z działaniem, do czasu aż wyrażę zgodę.
5. Powiadom mnie, co zamierzasz zrobić i rób to, chyba że ci tego zabronię.
6. Decyduj i działaj samodzielnie, powiadom mnie o uzyskiwanych wynikach.
7. Decyduj i działaj samodzielnie, powiadom mnie o wynikach, gdy są negatywne.
8. Decyduj i działaj samodzielnie - nie są potrzebne żadne kontakty ze mną.

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KIEROWNICY NIECHĘTNI DELEGOWANIU UPRAWNIEŃ

EGOIŚCI - traktują delegowanie uprawnień jako naruszenie ich prestiżu i pozycji. Utrwalają przekonansie, że wiedzą wszystko najlepiej. Przypisują sobie możliwie najwięcej sukcesów (także nie swoich)

KONIE ROBOCZE - przyzwyczajeni do ponoszenia ofiar, wszystko robią sami, także za podwładnych. Uważają, że są solidni. Nie odróżniają pracy rutynowej od ważnych zadań kierowniczych. Wierzą, że mogą wszystkim zająć się sami. Nie mają twórczej wyobraźni i perspektywicznego myślenia, opierają się na rutynie i doświadczeniu. W stosunku do podwładnych są autokratyczni, okazują swą władzę, nie dopuszczają do dyskusji.

NIEDOŚWIADCZENI - w rozwijających się firmach specjaliści awansujący na stanowiska kierownicze mają kłopoty z ogarnięciem całości spraw i zależności. Nie orientują się, co należy do ogólnych zadań kierowniczych, jakie decyzje podejmować. Nie zdają sobie sprawy, jakie znaczenie dla nich i podwładnych może mieć delegowanie uprawnień. Są tak zajęci, że nie mają czasu zadbać o rozwój podwładnych. Starają się unikać błędów, wierzą, że ich zdolności techniczne pozwolą pokonać trudności.

NIEPEWNI - chętnie podejmują się kierowania, ale czują się niepewnie, gdyż nie znają środków oddziaływania na podwładnych. To jedna z przyczyn niechęci do delegowania uprawnień - nie rozumieją jego znaczenia. Poza tym obawiają się, że podwładni okażą się lepsi od nich w wykonywaniu przekazywanych zadań. Boją się ryzyka współzawodnictwa z innymi, dlatego dbają o sprawowanie kontroli nad podwładnymi. Nie delegują, żeby nie okazało się, że przekazali zbyt dużo uprawnień.

MAJĄCY ZAWSZE GOTOWE WYMÓWKI - nie mogą ogarnąć wszystkich przypisanych im spraw. Nie potrafią zaplanować swego czasu i go wykorzystać, mają problemy z koordynacją i kontrolą. Natomiast potrafią ciągle narzekać na niskie kwalifikacje swoich podwładnych, co zmusza ich do przejmowania odpowiedzialności na swoje barki. Wykazują umiejętność stawiania pułapek, mają zawsze gotowe wymówki, kiedy nie wywiążą się z czegoś - ubolewają nad nieefektywnością podwładnych. Twierdzi, że nie może delegować, bo podwładni nie są przygotowani, albo nie ma czasu na tłumaczenie podwładnym istoty zadań, albo ma złe doświadczenia, albo brakuje pracowników, albo to co musiał, to już przekazał.

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PROBLEMY KONTROLI

NIECHĘĆ I ODRZUCANIE INSTRUMENTÓW KONTROLI

PRZYCZYNY:

* sprzeczność celów
* wyniki zależą od czynników nie podlegających ich kontroli
* sprzeczność ocen
* niesprawdzalność ocen
* nieprzewidywalność ocen
* nieosiągalność ocen
* niezgodność między stylem przywództwa a kontrolą
* nierealność zadań

PRZESTARZAŁE WYTYCZNE I PROCEDURY

PRZEDWCZESNE, GWAŁTOWNE REAKCJE

NADMIERNE KOSZTY

CECHY SKUTECZNYCH SYSTEMÓW KONTROLI

SCISŁOSC

AKTUALNOSC

OBIEKTYWIZM I ZROZUMIAŁOSC

KONCENTRACJA NA STRATEGICZNYCH PUNKTACH KONTROLI

REALIZM EKONOMICZNY

REALIZM ORGANIZACYJNY

KOORDYNACJA

ELASTYCZNOSC

NORMATYWNOSC I OPERACYJNOSC

AKCEPTACJA PRZEZ CZŁONKÓW ORGANIZACJI

OBJECTIVES OF THE TEAM BUILDING SEMINAR

1. TO UNDERSTAND DIFFERENT TECHNIQUES IN DEVELOPING SEMINARS
2. TO LEARN HOW TO DESIGN A TEAM BUILDING SEMINAR
3. TO EXPERIENCE EXERCISES WHICH ILLUSTRATE THEORIES OF TEAM BUILDING
4. TO UNDERSTAND THE ROLE OF THE SELF IN TEAMS
5. TO DISCUSS THE ROLE OF THE SUPERVISOR AND OTHER TEAM MEMBERS
6. TO LEARN HOW TEAMS DIFFER FROM GROUPS
7. TO STUDY SURVEYS OF TEAM PERFORMANCE
8. TO UNDERSTAND EFFECTIVE TEAMS
9. TO LEARN ABOUT LEADERSHIP AND TEAM DEVELOPMENT
10. TO PRACTICE EVALUATING SEMINARS

GROUND RULES FOR THIS SEMINAR

1. PARTICIPATE AS MUCH AS POSSIBLE IN THIS SEMINAR
2. BE WILLING TO COMMIT YOURSELF TO TRYING NEW BEHAVIOR
3. BE OPEN TO NEW IDEAS
4. LEARN WITH YOUR AUDIENCE IN MIND
5. THINK ABOUT HOW TO TELL YOUR EMPLOYEES ABOUT TEAMS
6. THIS IS YOUR SEMINAR
7. UNDERSTAND THE CONCEPTS OF POSITIVE CRITIQUING AND EFFECTIVE FEEDBACK
8. WATCH YOURSELF AND OTHERS AND LEARN
9. HAVE FUN

INDIVIDUAL LEARNING

- BE AUTHENTIC AND CARING
- BE SPECIFIC
- BE TIMELY
- GIVE BOTH POSITIVE AND NEGATIVE FEEDBACK
- OWN THE FEEDBACK
- BE BEHAVIORAL
- BE BALANCED
- ADOPT GOOD MANNERS
- PRESERVE THE OTHER PERSON'S SELF-ESTEEM
- ACCEPT FEEDBACK YOURSELF

BRAINSTORMING AS A CREATIVE TECHNIQUE

- NO CRITICISM
- ALL IDEAS ARE ENCOURAGED
- AS MANY IDEAS AS POSSIBLE
- IDEAS SHOULD BE BUILT ON
- MUST CONTINUE FOR A SPECIFIC AMOUNT OF TIME

WHY ARE TEAMS IMPORTANT?

1. Fast pace of change:

   Technology, market analysis and marketing more sophisticated; synergy is 2 + 2 = 5.

2. To compete, we need specialists:

   "left hand not knowing what right hand is doing" problems.

3. Worker values emphasize individual input into decisions:

   these values need to be reflected in new structures that allow for each individual's input

4. Increasingly diverse workforce:

   Need vehicles for incorporating diverse ideas to tap creativity and resolve conflicts.

WHY IS KNOWING ABOUT YOURSELF IMPORTANT TO TEAM BUILDING?

UNDERSTANDING YOURSELF ALLOWS YOU TO KNOW HOW YOU ARE GOING TO REACT TO CHANGE AND TO SUPERVISION

UNDERSTANDING YOURSELF ENCOURAGES YOU TO BE MORE EMPATHETIC

UNDERSTANDING YOURSELF ALLOWS YOU TO BE MORE FLEXIBLE

UNDERSTANDING YOURSELF IS A WAY OF BECOMING A COMMITTED TEAM MEMBER

THE FIRO THEORY
FUNDAMENTAL INTERPERSONAL RELATIONSHIP ORIENTATION

INCLUSION IS THE NEED TO ESTABLISH AND MAINTAIN SATISFACTORY RELATIONSHIPS WITH PEOPLE THAT WITH REGARD TO BEING INCLUDED. (IN/OUT)

THE NEED FOR CONTROL IS THE NEED TO ESTABLISH AND MAINTAIN SATISFACTORY RELATIONSHIPS WITH PEOPLE WITH REGARD TO CONTROL AND POWER. (UP/DOWN)

THE NEED FOR AFFECTION IS THE NEED TO ESTABLISH AND MAINTAIN SATISFACTORY RELATIONSHIPS WITH PEOPLE ABOUT LOVE, FRIENDSHIP AND CARING. (NEAR/FAR)

The FIRO-B

	Inclusion	Control	Affection
Expressed			
Wanted			

HIGH PERFORMING TASK GROUP

share a specific performance objective or recognizable goal

they are <u>actively interdependent</u>

DISTINGUISHING A TEAM FROM A GROUP

1. Size -- grps. can be unlimited; teams rarely go above 9 members (not feasible to function effectively)

2. Duration: Some people have argued that teams are a fixed collection of people who work together -- but teams can be temporary or ad-hoc.

3. Sense of identity -- people think of themselves as members, as "belonging" (in groups, people do not always have this sense of identity -- e.g., people who work for a large company may not identify with the company as a whole).

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Types and Purposes of Teams

Strategic Teams:

Teams that are supervised by top managers or owners who chart course of the company and serve as links to external environment.

Management Teams:

Usually individual managers and their subordinates. Handle the work on a day to day basis (e.g., running the factory, producing the product, delivering product to customers).

Training Teams:

Groups charged with developing organization's managerial skills and resources; function as trainers providing programs; objectives are to get other managers to own team building approaches.

Project Teams:

Project teams are charged with solving specific problems and developing/improving products and processes. They have a mix of skills and often have to make decisions using incomplete or ambiguous data.

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Types and Purposes of Teams (cont'd.)

Representative Teams and Committees:

Are formed to represent interest groups or may be created of individuals with particular skills, viewpoints or experience.

Work Groups:

Emphasis in effective workgroups is on participation and more workplace democracy so that workers' individual energy goes toward benefiting the organization; team concepts help implement "shop floor" democracy and counter indifference and lack of care that affect many production and service units.

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WHAT HAPPENS WHEN YOU USE SURVEYS FOR NEGATIVE PURPOSES?

1. THE TEAM'S MORALE CAN DIP

2. IT CAN CAUSE LOW MOTIVATION

3. PEOPLE GET ANGRY

4. TEAMS CAN SABOTAGE YOUR EFFORTS

5. TEAMS WILL "TELL YOU WHAT THEY THINK YOU WANT TO HEAR"

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Practices of Exemplary Leaders

Challenging the Process

- Searching for Opportunities
- Experimenting

Inspiring a Shared Vision

- Envisioning the Future
- Enlisting Others

Enabling Others to Act

- Fostering Collaboration
- Strengthening Others

Modeling the Way

- Setting an Example
- Planning Small Wins

Encouraging the Heart

- Recognizing Contributions
- Celebrating Accomplishments

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Challenge the Process

Commitment Number 1

Search out challenging opportunities to change, grow, innovate, and improve.

Commitment Number 2

Experiment, take risks, and learn from the accompanying mistakes.

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Inspire a Shared Vision

Commitment Number 3

Envision an uplifting and ennobling future.

Commitment Number 4

Enlist others in a common vision by appealing to their values, interests, hopes, and dreams.

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Enable Others To Act

Commitment Number 5

Foster collaboration by promoting cooperative goals and building trust.

Commitment Number 6

Strengthen people by sharing information and power and increasing their discretion and visibility

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Model The Way

Commitment Number 7

Set an example for others by behaving in ways that are consistent with your stated values.

Commitment Number 8

Plan small wins that promote consistent progress and build commitment.

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Encourage The Heart

Commitment Number 9

Recognize individual contributions to the success of every project.

Commitment Number 10

Celebrate team accomplishments regularly.

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The Ten Commitments of Leadership

1. Search for challenging opportunities to change, grow, innovate, and improve.

2. Experiment, take risks, and learn from the accompanying mistakes.

3. Envision an uplifting and ennobling future.

4. Enlist others in a common vision by appealing to their values, interests, hopes, and dreams.

5. Foster collaboration by promoting cooperative goals and building trust.

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The Ten Commitments of Leadership (continued)

6. Stengthen others by sharing information and power and increasing their discretion and visibility.

7. Set an example for others by behaving in ways that are consistent with your stated values.

8. Plan small wins that promote consistent progress and build commitment.

9. Recognize individual contributions to the success of every project.

10. Celebrate team accomplishments regularly.

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Mean and Standard Deviation Comparisons Between Public and Private Sector Managers on the LPI

Practice	Self and Others				Self				Others			
	Public Sector (N = 137)		Private Sector (N = 197)		Public Sector (N = 22)		Private Sector (N = 35)		Public Sector (N = 115)		Private Sector (N = 162)	
	Mean	S.D.	Mean	S.D.	Mean	S.D.	Mean	S.D.	Mean	S.D.	Mean	S.D.
Challenging the Process	22.45	4.70	22.99	3.93	24.05	3.05	23.54	3.35	22.14	4.90	22.87	4.04
Inspiring a Shared Vision	20.32	5.10	19.90	5.24	21.05	4.12	20.34	4.34	20.18	5.28	19.81	5.42
Enabling Others to Act	23.64	4.40	23.99	4.28	25.36	1.81	25.49	2.50	23.30	4.67	23.66	4.52
Modeling the Way	21.74	4.36	22.44	4.29	24.27	2.05	22.83	3.27	21.25	4.52	22.36	4.49
Encouraging the Heart.	22.18	5.64	22.63	4.73	24.36	4.75	23.54	3.90	21.76	5.72	22.43	4.88

Comparisons Between Male and Female Managers on the LPI-Self

Practice	Males (N = 549)		Females (N = 159)	
	Mean	Standard Deviation	Mean	Standard Deviation
Challenging the Process	23.42	3.10	23.52	3.17
Inspiring a Shared Vision	20.94	4.06	21.28	4.54
Enabling Others To Act	25.12	2.58	24.99	2.79
Modeling the Way	22.97	3.17	23.29	3.12
Encouraging the Heart*	22.97	3.90	24.42	3.57

*Two-tail t-test was statistically significant ($p < .001$).

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THE EFFECTIVE TEAM LEADER

- √ Builds openness
- √ Empowers other to develop their unique competencies and skills
- √ Harnesses team initiative to achieve shared objectives

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CREATING A POSITIVE CLIMATE FOR TEAMS

THE PROBLEM OF BEING "STUCK"

1. PAST EXPERIENCES DICTATE WHAT INDIVIDUALS AND TEAMS BELIEVE THEY CAN OR CANNOT DO

2. THE GROUP HAS COMMONLY HELD BELIEFS AND BEHAVIOR PATTERNS THAT HINDER HIGH PERFORMANCE.

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THE PROCESS OF GETTING UNSTUCK AND CREATING A POSITIVE CLIMATE

1. RECOGNIZE: LEARN TO KNOW PHRASES THAT MEAN RESISTANCE LIKE "WE TRIED THAT" OR "OH, THEY'LL NEVER DO THAT; BELIEVE ME, I KNOW THEM"

2. DESCRIBE: TRY DESCRIBING A NEGATIVE THOUGHT THAT YOU HEAR SOMEONE ELSE SAYING AND THEN COME UP WITH A POSTIVE ALTERNATIVE. "I KNOW YOU'VE WORKED HERE LONGER THAN I HAVE, BUT LET'S TRY SITTING DOWN AND THINKING THIS THROUGH BEFORE WE JUST GIVE UP."

3. CHALLENGE: ALWAYS CHALLENGE THE ASSUMPTIONS THAT THINGS WON'T GO RIGHT OR THAT CHANGE IN STRUCTURE SUCH AS TEAMS, WILL ALWAYS BE BAD.

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DECIDING HOW TO MAKE DECISIONS

- DECISIONS MADE BY THE LEADER ALONE
- DECISIONS MADE BY THE LEADER WITH INPUT FROM THE GROUP
- DECISION BY THE GROUP
- DECISIONS MADE ANY OF THE METHODS ABOVE (IT DOESN'T MATTER WHICH)

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ELEMENTS OF AN EFFECTIVE DECISION

- THE QUALITY OF THE DECISION (ITS APPROPRIATENESS TO THE OBJECTIVES OF THE TEAM OR BUSINESS)

- THE DECISION SUPPORT BY THOSE PEOPLE REQUIRED TO IMPLEMENT IT.

THE JOB OF THE SUPERVISOR IS TO:

-MAINTAIN QUALITY
-BE SURE THAT THE DECISION WILL BE CARRIED OUT

DECISION EFFECTIVENESS =
f(decision quality x decision support)

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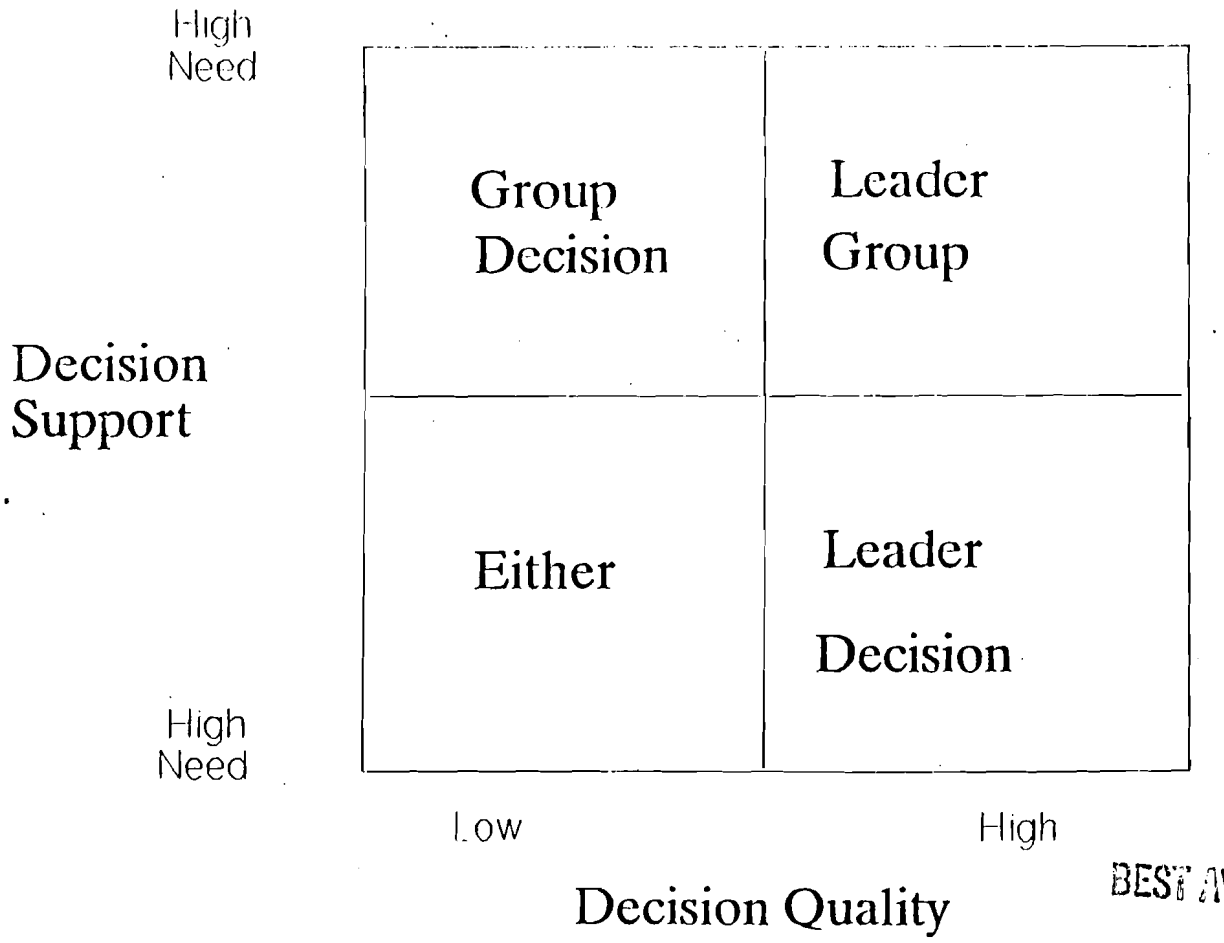
Leader-Team Decision Situations



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GENERATING PARTICIPATION IN TEAM MEETINGS

- ASK OPEN-ENDED QUESTIONS
- CALL ON PEOPLE DIRECTLY
- ASK PEOPLE TO COME PREPARED
- REINFORCE ON-PURPOSE STATEMENTS
- ASK MEMBERS OF THE GROUP TO ACKNOWLEDGE EACH OTHER
- USE PROMPTS: VERBAL AND NONVERBAL
- USE APPROPRIATE SILENCE--WAIT FOR ANSWERS
- REDIRECT QUESTIONS ASKED OF YOU TO OTHER MEMBERS OF THE TEAM (SOMETIMES BACK TO THE PERSON WHO ASKED)
- USE ICE BREAKERS AND WARM-UP EXERCISES

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GENERATING PARTICIPATION IN TEAM MEETINGS (CONT'D.)

- AVOID WIN/LOSE SITUATIONS
- SUMMARIZE AND RESTATE KEY COMMENTS
- SELF-DISCLOSE--SHARE PERSONAL EXPERIENCES
- WRITE KEY STATEMENTS ON FLIPCHARTS AND POST
- MAKE EYE CONTACT
- MOVE CLOSE TO THE PERSON YOU WANT TO REINFORCE
- USE HUMOR
- STAY OPEN TO THE VIEWPOINT OF OTHERS
- DESCRIBE TO THE GROUP WHAT YOU SEE OCCURRING

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Assessment of Leadership Actions

The following checklist gives you an opportunity to assess some of your strengths and development areas related to five key practices. How would you rate your leadership competence in each of the areas listed below using the following scale?

3 = Strength – I do this very well
2 = Competent – I do this moderately well
1 = Development Area – I definitely need to increase my competence

Record the appropriate number in blank for each item.

Challenging the Process: Confronting and Changing the Status Quo

___ 1. Searching for opportunities to initiate change

___ 2. Experimenting and taking risks; learning from mistakes and successes.

Inspiring a Shared Vision: Communicating Your Hopes So That Others Understand and Accept Them as Their Own

___ 3. Envisioning the future; having a mental image or personal agenda of a positive and desirable future state.

___ 4. Enlisting others in that vision by communicating it in a way that attracts others and links with their goals

Enabling Others to Act: Building Coalitions of Supporters and Collaborators

___ 5. Fostering collaboration by getting people to work together.

___ 6. Strengthening others by sharing power and information.

Modeling the Way: Showing My Philosophy, Standards and Personal Values About How Employees and Customers are Treated

___ 7. Setting the example and leading by doing.

___ 8. Planning small wins by breaking projects into small, manageable chunks.

Encouraging the Heart: Showing Pride and Love for People, For What They Do, For Customers

___ 9. Recognizing contributions and linking rewards to performance.

___ 10. Celebrating accomplishments based on key values, making public recognitions and being personally involved.

Adapted from Kouzes & Posner, The Leadership Challenge.

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FUNDAMENTAL INTERPERSONAL RELATIONSHIP ORIENTATION - BEHAVIOR (FIRO-B)

This questionnaire is designed to explore the typical ways you interact with people. There are, of course, no right or wrong answers: each person has his or way of behaving. Sometimes people are tempted to answer questions like these in terms of what they think a person should do. This is not what is wanted here. We would like to know how you actually behave.

Some items may seem similar to others. However, each item is different, so please answer each one without regard to the others. There is no time limit, but do not debate long over any item.

DIRECTIONS:

For each statement below, decide which of the following answers best applies to you. Place the number of the answer on the line at the left of the statement. Please be as honest as you can.

1. Usually 2. Often 3. Sometimes 4. Occasionally 5. Rarely 6. Never

___ 1. I try to be with people.

___ 2. I let other people decide what to do.

___ 3. I join social groups.

___ 4. I try to have close relationships with people.

___ 5. I tend to join social organizations when I have an opportunity.

___ 6. I let other people strongly influence my actions.

___ 7. I try to be included in informal social activities.

___ 8. I try to have close, personal relationships with people.

___ 9. I try to include other people in my plans.

___ 10. I let other people control my actions.

___ 11. I try to have people around me.

___ 12. I try to get close and personal with people.

___ 13. When people are doing things together, I tend to join them.

___ 14. I am easily led by people.

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___ 15. I try to avoid being alone.

___ 16. I try to participate in group activities.

For each of the next group statements. choose one of the following answers:

1. Most People	2. Many People	3. Some People	4. A Few People	5. One or Two People	6. Nobody

___ 17. I try to be friendly to people.

___ 18. I let other people decide what to do.

___ 19. My personal relations with people are cool and distant.

___ 20. I let other people take charge of things.

___ 21. I try to have close relations with people.

___ 22. I let other people strongly influence my actions.

___ 23. I try to get close and personal with people.

___ 24. I let other people control my actions.

___ 25. I act cool and distant with people.

___ 26. I am easily led by people.

___ 27. I try to have close. personal relationships with people.

For each of the next group of statements. choose one of the following answers:

1. Most people	2. Many People	3. Some People	4. A Few People	5.One or Two People	6. Nobody

___ 28. I like people to invite me to things.

___ 29. I like people to act close and personal with me.

___ 30. I try to influence strongly other people's actions.

___ 31. I like people to invite me to join in their activities.

___ 32. I like people to act close toward me.

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___ 33. I try to take charge of things when I am with people.

___ 34. I like people to include me in their activities.

___ 35. I like people to act cool and distant toward me.

___ 36. I try to have other people do things the way I want them done.

___ 37. I like people to ask me to participate in their discussions.

___ 38. I like people to act friendly toward me.

___ 39. I like people to invite me to participate in their activities.

___ 40. I like people to act distant toward me.

For each of the next group of statements, choose one of the following answers:
1. Usually 2. Often 3. Sometimes 4. Occasionally 5. Rarely 6. Never

___ 41. I try to be the dominant person when I am with people.

___ 42. I like people to invite me to things.

___ 43. I like people to act close toward me.

___ 44. I try to have other people do things I want done.
___ 45. I like people to invite me to join their activities.

___ 46. I like people to act cool and distant toward me.

___ 47. I try to influence strongly other people's actions.

___ 48. I like people to include me in their activities.

___ 49. I like people to act close and personal with me.

___ 50. I try to take charge of things when I'm with people.

___ 51. I like people to invite me to participate in their activities.

___ 52. I like people to act distant toward me.

___ 53. I try to have other people do things the way I want them done.

___ 54. I take charge of things when I'm with people.

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SCORING THE FIRO

The FIRO-B produces six scores. If you selected any of the responses noted below, i.e., "2" for question 1 under eI, give yourself a "1". The range of possible scores for each subscale is 0-9. Count the number of "1s" you get for each subscale and not it in the appropriate box.

Scoring Key for FIRO-B

	eI		wI		eC
1.	1-2-3	28.	1-2	30.	1-2-3
3.	1-2-3-4	31.	1-2	33.	1-2-3
5.	1-2-3-4	34.	1-2	36.	1-2
7.	1-2-3	37.	1	41.	1-2-3-4
9.	1-2	39.	1	44.	1-2-3
11.	1-2	42.	1-2	47.	1-2-3
13.	1-2	45.	1-2	50.	1-2
15.	1	48.	1-2	53.	1-2
16.	1	51.	1-2	54.	1-2

	wC		eA		wA
2.	1-2-3-4	4.	1-2	29.	1-2
6.	1-2-3-4	8.	1-2	32.	1-2
10.	1-2-3	12.	1	35.	5-6
14.	1-2-3	17.	1-2	38.	1-2
18.	1-2-3	19.	4-5-6	40.	5-6
20.	1-2-3	21.	1-2	43.	1
22.	1-2-3-4	23.	1-2	46.	5-6
24.	1-2-3	25.	4-5-6	49.	1-2
26.	1-2-3	27.	1-2	52.	5-6

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THINGS TO WATCH FOR IN TEAMS

One typical method of observing how people operate in groups is to seem them in action. Simulations produce "realistic" reactions in participants. Some of the ways in which people act in these settings are predictable. They are also helpful data for transfer of learning to real-life, back-at-work situations. Please take time to read these handouts. Thanks.

Hints to the Observers:

1. Take this seriously. Most of us don't often get feedback on our behavior from others, even in the performance appraisal. You will be asked to tell people what you saw them doing. They may be apprehensive or react defensively. They may laugh or try to defer your feedback. Be sensitive to their needs as you would want others to be sensitive to yours.

2. Read the handout on Effective Feedback and review it.

3. Always give more rather then less feedback to individuals. Each person will be expecting some data from you. Most of the time they want to hear how they looked to you and what you saw, in great detail. Try not to skimp or rush because you are uncomfortable with the process. If you think you will have difficulty doing this, let someone know and we can substitute someone else.

4. Try to give honest data observation, but do not judge. Since this is all in a spirit of learning and fun, everyone will need some information. Be assertive.

5. Take all the time you need (within our time frame.) I will ask you to take your group off into a corner.

6. After you have given the group members feedback, ask each of them to react and talk about what happened in their group. Try to elicit transferable learning information from this simulation to back-to-work situations. You and your group will be asked to report out at the end of the simulation, when the whole group gets back together.

WHAT HAPPENS IN COMPETITIVE SITUATIONS:

1. Each group usually becomes more closely knit and elicits greater loyalty from its members; members close ranks and bury some of their internal differences.

2. Group climate changes from informal, casual to work- and task-oriented; concern for members' psychological needs declines and concern for task increases.

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3. Leadership patterns tend to change from more democratic toward more autocratic; the group becomes more willing to tolerate autocratic behavior.

4. Each group becomes more highly structured and organized.

5. Each group demands more loyalty and conformity from its members in order to be able to present a "solid front."

Competing Groups:

1. Each group begins to see the other groups as antithetical, rather than neutral.

2. Each group begins to experience distortions of perception; it tends to perceive only the best parts of itself, denying its weakness, and tends to perceive only the worst parts of the other groups, denying their strengths. Each group develops perceptions of the others (they cheat; we don't).

3. Less interaction evolves with other groups; less communication evolves with other groups. Members become secretive and "steal" ideas or "spy" on other groups.

Winners and Losers:

1. Winners retain their cohesion and become more cohesive.

2. Winners tend to release tension--rah, rah behavior, complacency, etc.

3. Winners tend toward high concern for psychological needs and lower concern for work.

4. There is often little interest in learning about the behavior of individual group members, since the group feels that as the sinners, they don't really need to learn anything new.

5. Losers tend to rationalize the loss, especially if it is "close."

6. Losers tend to splinter, unresolved conflicts erupt and arguments or whatever supplants arguments, occurs, all as ways to find reasons for the loss.

7. Losers are more tense, looking for something to blame--the facilitator, the game (this is a stupid game anyway), the organization (why are we even doing this).

8. Losers tend to learn a lot about themselves, the loss forcing a re-evaluation of perceptions; as a consequence, the losers often reorganize and become more cohesive and effective.

Observer's Sheet

1st 15 mins.

2nd 15 mins.

3rd. 15 mins.

4th 15 mins.

5th 15 mins.

Communication Patterns

PROCESS OBSERVATION SHEET

Watch for these important functions in your team as you watch them solve the problem. Please read the sheet on Feedback first. Always use behavioral examples. You will be asked to give feedback to your team and to the large group.

1. Communication--Who speaks; who doesn't; who do they speak to; what are the non-verbal ques; what communication patterns emerged

2. Leadership--Who emerges as the leader; why; how do you know; who were the followers; was there a struggles for leadership

3. Decisions--How were they made; what method (if any) was used; was everyone ok with the final decision; how do you know

4. Power--Who was in charge; was it the leader; if not, why; was there an "expert;" did everyone agree on who had power/status

5. Teamwork--Did they operate as a team or as individuals; did anyone drop out, give up, not play; what roles did people play (task, maintenance, individual)

6. Other--Was anyone keeping the team from working

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Boguslaw Plawgo, Bialystok Business School
Enterprise Institute

Business Negotiations Seminar
- 12 hours

Content	Process
I. Introduction - Negotiation as a part of our daily life - Can you learn to become a good negotiator? - Overview of the seminar	
II. Negotiation styles - an exercise	Participants are asked to fill out a questionnaire what will help the instructor to define negotiation styles their represent.
III. Conflict and conflict management	
IV. When are you ready to negotiate? - Understand mutual gains - Conflict perception	
V. Positional negotiation - "A used car" example - Criteria for evaluating the negotiation style - Hard and soft bargaining	
VI. Negotiation on the merits - Separate the people from the problem - Focus on the interests, not on the stated positions - Invent options for the mutual gains - Base the agreement on objective standards and fair procedures	
VII. "Prisoner Dilemma" example	

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Content	Process
VIII. The Psychology of Negotiations - Perceptions - Communication - Characteristics of an effective negotiator - Assertiveness	
IX. Role plays and simulations to illustrate some issues	
X. The power of negotiation	
XI. The negotiation process and the role of preparation	
XII. Collective Bargaining - exercise	

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BASIC NEGOTIATION STRATEGIES

Prepared by Roy J. Lewicki, Ph.D.
College of Business
The Ohio State University
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(614) 292-0258
(614) 488-0546 Fax

Resources: *Negotiation* by Roy J. Lewicki; Joseph Litterer; John Minton; and David Saunders. Richard D. Irwin, Burr Ridge, Illinois USA, 1994

Negotiation Readings, Exercises and Cases by Roy J. Lewicki and Joseph Litterer. Irwin, Homewood, 1985.

DEFINITION OF NEGOTIATION

Interaction that occurs when two or more parties attempt to agree on a mutually acceptable outcome in a situation where their preferences for outcomes are negatively related.

Use of information and power to affect the other party's behavior within a web on tension.

COMMON ELEMENTS OF ALL DEFINITIONS

Two or more parties

Conflict of interest

Voluntary relationship

Two kinds of activity at stake:

- Dividing up the "tangibles"
- Resolving "intangibles"

Expectation of give and take

DEFINING THE TANGIBLES

Rate

Price

Length of agreement

Quantity purchased

Delivery, installation

Financial terms and conditions

DEFINING THE INTANGIBLES

Getting the deal

Making the customer happy

Standing by my principles

Being fair

Beating the opponent, competition

Preserving my reputation

Saving face, looking good to my constituency

Maintaining a precedent

SOURCES OF POWER IN NEGOTIATION

1. Information

   - Knowledge, expertise
   - Good preparation
   - Competitive advantages

2. Organizational pressure

   - Number of parties
   - Role of constituencies

     - Constituencies and accountability
     - Negotiator binds
     - Use of authority

   - Role of audiences
   - "Public" and "private" phases

3. Time

- Deadlines and how they work
- Who has deadline advantage?
- Who defines the deadline?

4. Legitimacy

- Organizational position or trappings
  - Position
  - Office, furniture, etc.
- Precedent, past performance
  - "Policies"
- Laws, rules, regulations, procedure
  - Who makes the rules
  - How the rules apply
  - How the rules change

5. Quantity/Quality of Options

- Role of Alternatives
- Best Alternative To A Negotiated Agreement (B.A.T.N.A.)
- My alternatives, BATNA
- Opponent's alternatives, BATNA

6. Personal Power

- Persuasiveness
- Patience and tenacity
- Integrity, character
- Capacity to reward and punish

TWO MAJOR MODELS OF NEGOTIATION

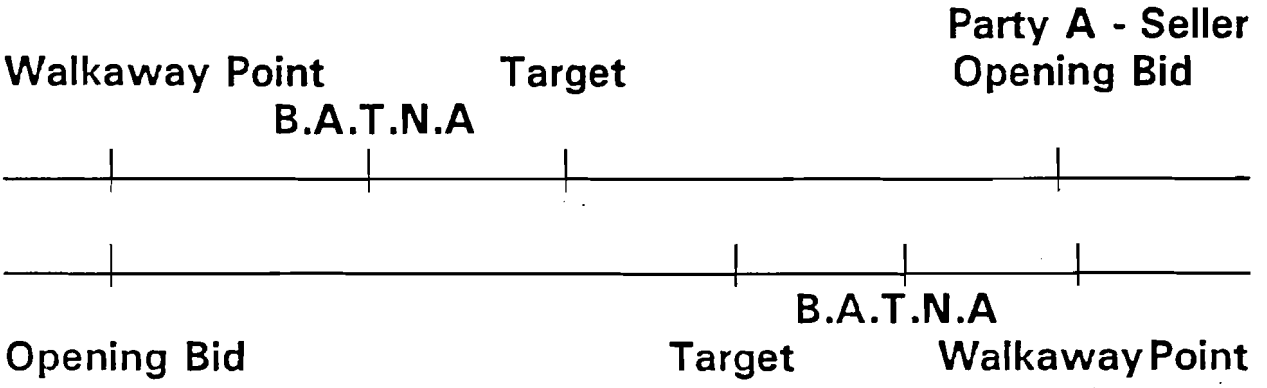
- Distributive (win-lose) Negotiation
- Integrative or Principled (win-win) Negotiation

FACTORS WHICH DETERMINE WHICH MODEL IS USED:

DISTRIBUTIVE (WIN-LOSE)	INTEGRATIVE (WIN-WIN)
Short term goals	Long term goals
Perceived incompatible goals	Perceived compatible goals
Emphasis on tangibles	Emphasis on intangibles
Mistrust, suspicion, defensiveness, perceived weakness	Trust, openness, perceived strength

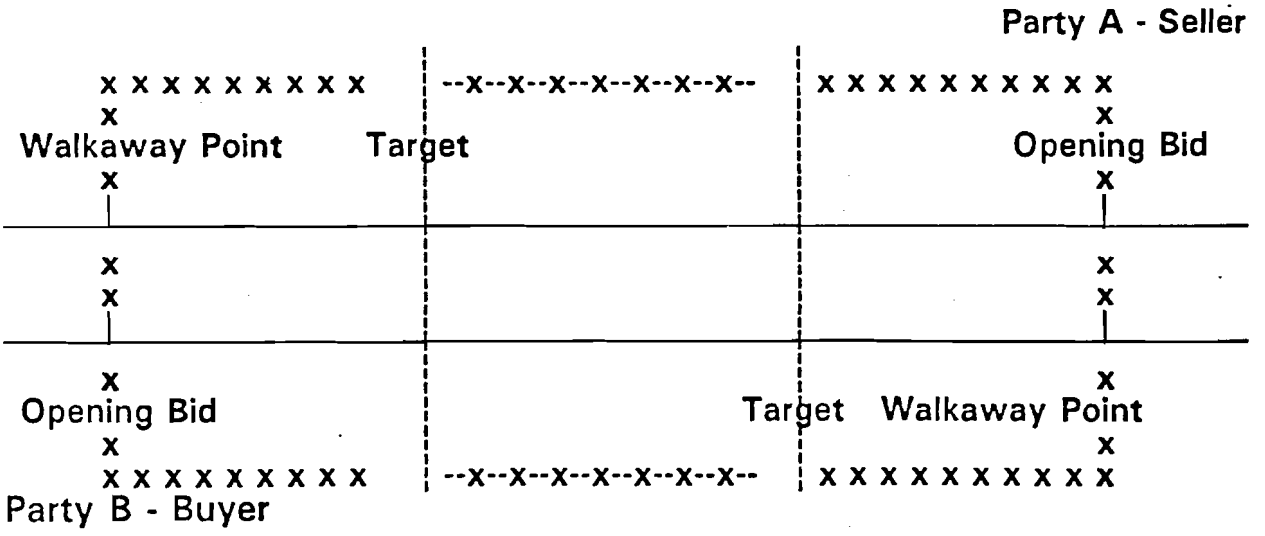
A MODEL OF DISTRIBUTIVE BARGAINING I

KEY POINTS:
- Opening Bid -
- Target -
- Walkaway -
- B.A.T.N.A. -
- Bargaining Mis -



A MODEL OF DISTRIBUTIVE BARGAINING II

Zone of Potential Agreement (xxxxx)
Zone of Likely Agreement (x--x--x--x)



SETTING KEY POINTS

1. How to Set a Target
   - Where we want to be
   - Past settlements
   - Comparable industry settlements or targets
   - What's "possible"
   - (Less than opening and more than resistance point)

2. How to Set an Opening Bid

- Reasonable distance from target
- Where they will "stop"
- Extreme vs. moderate:
  - Extreme: more room to move, they have to give some, "aim for the middle"
  - Moderate: won't be rejected outright, more credible, not as "tough"

3. How to Set a Resistance Point

- Current Agreement
- Minimally affordable (worth x cost)
- Other comparable settlements
- Painful but not intolerable
- Costs of delay and difficulty for them and us (Who needs the agreement more?)
- Value relative to Alternatives available

4. Role of Alternatives
   - What to do if we don't settle
   - How easy or difficult is it to pursue these?
   - What are their alternatives?

5. Bargaining Mix

- What is the collection of items that might constitute the "package"?
- What's important to us?
- What's important to them?
- Complimentary on importance vs. direct conflict?

THE STRATEGY OF DISTRIBUTIVE BARGAINING

Planning for Distributive Negotiation:

- Learn about the situation--get information--self and others
- Set priorities
- Define objectives and mix:
  - Target
  - Walkaway Point
  - Opening Bid
  - Alternatives
- Learn other's priorities, objectives, limits
- Learn other's "style", approach

Key Strategic Questions

- Opening Stance ("Attitude")
  - Nice vs. belligerent
  - Consistency with opening bid
- Proactive vs. Reactive
- Initial Concessions
  - Don't escalate!
  - Big vs. little moves
  - Start with important vs. unimportant issues in the mix
  - Firm vs. flexible
- Patterns of concessions
  - Overall pattern
  - "Packaging"
- Final Offers

STRATEGY

Objective	Strategy and Tactics
1. Maximize the value of this deal.	1. Start high. Be "tough." Keep asking them for more. Make small concessions.
2. Get them to concede first.	2. Stall for time. Don't concede first.
3. Hide your own bottom line.	3. Start high. Bluff and bully. Misrepresent limits.
4. Learn their bottom line.	4. Research. Ask lots of questions. Bully.
5. Get them to move their bottom line.	5. "Sell" your proposal. Threaten to walk away. Keep asking for more.
6. Move your own bottom line.	6. Develop options. Minimize pressures to settle.

TYPICAL DISTRIBUTIVE NEGOTIATION TACTICS

TACTIC	DESCRIPTION
Low Ball/ High Ball	Extremely low offer/high demand
Bogey	Argue strenuously for what you don't want, trade for what you do want
"What's Your Best Offer?"	Is this the best you can do?
"You've Got To Do Better Than That"	I can't believe your offer could be that low.
"What's Your Cost Breakdown?"	What are the calculations or background information that lead you to that offer?
"My Expert is More Expert Than Your Expert	Whose information is accurate?
Information Clam/ Silent Treatment	A refusal to speak or respond or offer any explanations.
Final Offer	This is the best I can do.
Limited Authority	I don't have the authority to discuss that issue or agree.
Power Tip	A negotiator into his/her own power.
Temper Tantrum	"Faked" anger to get you upset.
Good Guy/Bad Guy	Two negotiators: one rigid, one flexible

TACTIC	DESCRIPTION
Super-Contract Bait	Offering the opportunity for a giant deal to get a good price, but then only buying a small amount at that price.
Misleading Facts/ Lies	Bluffs, deceptions, distortions, misrepresentations.
Nibble	An additional small request after the deal has been tentatively wrapped up.
"Split the Difference"	Move the "middle" of the range in my direction, then split the difference in my favor.
Deadline/Delay	Using the power of time to pressure an opponent.
Poor Country Boy	Feigned ignorance to get the other side to disclose more information than they would prefer.
Commitments	Willingness to tie my hands by committing myself to a clear course of action.
Threats	Contingency statements that if certain actions are not forthcoming, bad things will happen.
"Chicken"	Publicly tie my hands and initiate the unstoppable.
Final Offer	This is the last offer I will make. I have reached my resistance point.

Key Dimensions of Commitments

- Finality of commitment
- Flexibility vs. certainty of commitment
- Specificity of commitment
- Consequences of commitment
- Public vs. private declaration of commitment

Abandoning them: "Trap Doors"--
need to have a way out!

- Let them die silently
- Restate more gently
- Help the other save face by getting out of an untenable commitment

How to Deal with the Others' Competitive Tactics:

1. Ignore them.
2. Respond in kind.
3. Raise them to the level of discussion.
   - Identify what happened in your eyes.
   - Offer to change to different behaviors.
4. Co-opt them before things get dirty.

SPECTRUM OF NEGOTIATIONS

DISTRIBUTIVE	INTEGRATIVE
Extreme positions and demands.	Work to satisfy mutual needs
Ignore relationship; act expediently	Build trust and a working relationship
Use emotional ploys	Be rational, reasonable
Don't make concessions; make little ones	Make concessions and personalize them
No authority to agree	Controlled authority
Ignore deadlines	Observe deadlines

KEY ELEMENTS OF INTEGRATIVE NEGOTIATION

(Adapted from Fisher and Ury, Getting to Yes)

The Principle: Negotiate on the merits of the problem

1. Be nice to the people but hard on the problem.
2. Focus on interests, not positions.
3. Insist on achieving the interests, needs of both sides.
4. Exchange information freely--but not your bottom line!
5. Get creative--create value--invent options for mutual gain.
6. Develop "objective" criteria for what is fair, reasonable, appropriate.

INTERESTS IN NEGOTIATION

- Distinguish interests from positions:

  POSITIONS: Starting points on issues

  INTERESTS: The "why" of positions

  Example: Negotiating a price on bed springs

  Position: $28.00 for springs on a rush order.

  Interest: "Make a profit on a rush order because it diverts other work and requires quick attention."

- Discussion of positions does not always lead to understanding the other's interests, or disclosure of one's own.

  Second Example: The Fresh Air Problem

  Positions: Open window vs. closed window

  Interests: Fresh air vs. no draft

- Stating interests often requires us to "reframe" what's important, from "hard", firm positions to "softer" statements of broad objectives.

Third Example--Salary negotiation in a new job:

Issue: Salary

Position: Starting level (e.g., $45,000)

Interests:
- status level
- comparable offers to peers
- future opportunities
- preferred lifestyle

TYPES OF INTERESTS

- Substantive Interests (Relate to the issues)
- Process Interests (Relate to how we settle the issues)
- Personal Interests (Relate to goals, needs, values of organization, what organization holds the negotiator accountable for)
- Relationship Interests (Relates to underlying goals of building or sustaining a relationship between the parties)

ANALYZING INTERESTS

1. Identify the key interests at stake.

2. Move beyond the "obvious".

   - Listen very carefully!

   - Ask open questions!

3. Interests are usually subjective--"intangibles":

   - Get to know the other

   - Learn the other's frame of reference--assumptions, feelings, perceptions.

   - Requires probing clear communication; may also require third parties.

4. Interests can change.

   - Can change over time and as people interact with one another.

5. Focus on interests to enhance solution creativity.

NEGOTIATOR BALANCE SHEET

What are the other's interests?	What are my interests?
Substantive	Substantive
Process	Process
Personal	Personal
Organizational	Organizational
Relationship	Relationship

How do we design a proposal that meets the interests of both sides?

STRATEGIES FOR INVENTING OPTIONS

Situation: A vacation at the mountains or the beach?

She:	He:
Sun	Mountain Air
Sand	Fishing
Night life	Privacy, Rest

1. Expand the Pie

   - Find more resources so that all obtain "more than" 50%

     - Take a two-week vacation and go both places

2. Nonspecific Compensation

   - Pay disadvantaged party off

     - Spouse who elects to forfeit their first choice gets compensation of their choice

3. Logrolling

   - Add more issues
   - Trade off on issues of different value
   - Give parties those elements which matter most to them
     - Choose location with amenities equally attractive to each spouse

4. Exploit Differences in Time Preference

- Trade gains now for gains later
- Payment over time
  - Go to beach this year, go to mountains next year

5. Exploit differences in Beliefs about the Future

- Contingent agreements, "Renewable"
  - Make agreement contingent on availability of locations, reservations

6. Cost Cutting

- Minimize the cost to the disadvantaged party
- Exploit differences in risk orientation ("insurance protection")
  - Spouse not receiving their choice of locations gets first choice of accommodations
  - Give assurances that minimum needs will be met

7. Bridging

- Find a solution that meets all interests and needs
  - Stay at an island resort that has a lake and beach, but that is close to a stream and mountains

8. Reframe the Negotiation Problem

- Redefine the problem (bigger-smaller, broader-narrower, short-long term)

USE OF QUESTIONS IN NEGOTIATION

The objective of questions is to get the opponents to express needs, desire and prejudices.

1. Open, Nondirective questions

   Objective: Give an opinion, relate an experience, draw people out.

   "What do you think of...?"
   "What has been your experience with...?"
   "How do you feel about...?"

2. Direct, structured, closed questions

   Objective: Give a specific answer, provide further, more specific information.

   "How long do you think it would take to get approval?"
   "How would you benefit if we did this?"
   "What would be the best way to handle that problem?"

3. Reflective questions

   Objective: Follows response to an open question, clarify understanding of what the respondent really means or intends.

   "So you believe that..."
   "And so you feel that..."
   Paraphrase of respondents key words of ideas.

Why questions are used:

1. Open the discussion.
2. Probe for facts and feelings.
3. Probe "deeper" for true needs, interests, motivations.
4. Get an opinion.
5. Keep the opponent talking.
6. Check the opponent's reactions.
7. Assure that the opponent understands your presentation, perspective.
8. Set the stage for closing.

HOW TO LISTEN EFFECTIVELY

Why we don't listen well:

1. Don't pay attention.
2. Miss the real point.
3. Let emotions interfere.
4. Allow distraction to interfere.
5. Don't give the other a chance to speak completely.
6. Assume we know where the other's thoughts are going.

Keys to effective listening:

1. Focus your attention on listening.
2. Pay attention.
3. Tune out distractions.
4. Control emotions.
5. Listen for the keys to the sale.
6. Focus on their ideas, interests, needs.
7. Listen for more than their words--emotions.
8. Repeat back, use paraphrase or open questions to clarify any misunderstanding.
9. Watch for the nonverbal signals as well.

NEGOTIATION AT THE CLOSING

1. Use questions to get commitments.
2. Start with the easy agreements.
3. Deal with the objections.
4. Use inducements ("Blue Light Specials") to complete the negotiation.
5. Use "salami" tactics if necessary.
6. Watch out for their distributive tactics at the end!

EVALUATING THE AGREEMENT--IS IT SOUND?

1. Is there a preamble in which the intent of the agreement is clearly spelled out?

2. Are all the issues of interest to either side addressed?

3. Are the proposals workable?

4. Have all parties impacted by the agreement been consulted?

5. For each point of agreement, is it absolutely clear what you have agreed to, including what is to be done, by whom, by what time, and how?

6. Does the agreement in total make sense?

7. Is the agreement reasonable and equitable?

8. Have you considered the major barriers to fulfilling the agreement? How?

9. Do you have a vehicle for managing disagreements arising out of this agreement? Is it clear to all parties how this vehicle works?

SPECIAL NEGOTIATING SITUATIONS

1. What is they continue to bargain positionally?
   - Focus on needs and undermine their positional tactics
   - Use negotiation ju jitsu

     Look for needs and interests
     Ask questions: "Why?", "How?", "What will that do for your position?"
     Invite criticism of your ideas
     Turn attacks on you into attacks on problem

   - Try a one-text procedure

2. What if they are more powerful?
   - Protect yourself
   - Cultivate your best alternative
   - Formulate a trip wire alert system

3. What if they use dirty tricks?
   - Ignore them
   - Raise them to the level of discussion: "call" their tactic and give them a choice to change
   - Offer the change to more productive techniques

ELEMENTS OF SUCCESSFUL NEGOTIATION

I. Preparation: (Key: avoid egocentric planning)

- Do better (not more) planning.
- Understand the situation, including points of agreement.
- Establish upper and lower limits, not a fixed point for agreement.
- Do flexible process planning, not fixed sequence planning.
- Explore other's interest and invent a wide range of options to meet them.

II. Entry and exploration: (Keys: put opponents at ease, give more accurate information)

- Ask lots of questions (preferably open-ended).
- Avoid immediate counterproposals.
- Express feelings.
- Tacitly negotiate process: authority, etiquette and procedure.
- Warn opponent about what you are going to do.

III. Inventing and bargaining: (Key: establish a desire to agree)

- Avoid gratuitous and defending/attacking language.
- Provide reasons for disagreement.
- Test for understanding.
- Give a very few good reasons to back up your positions.
- Probe for and solve opponent's problems.

IV. Closure and implementation: (Key: a good idea is not enough)

- Do not be pressured.
- Make the agreement operational.
- Follow through on the agreement.
- Review and learn from negotiation.

ENTREPRENEURSHIP INSTITUTES IN POLAND

Eleventh Quarterly Report
January - March, 1994
Volume 2

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CENTER ON EDUCATION AND TRAINING FOR EMPLOYMENT

The Ohio State University
Columbus, Ohio

APPENDIX

4.0

SUPPORT
INSTITUTE
LEADERSHIP

BIAŁYSTOK SCHOOL OF BUSINESS
ENTREPRENEURSHIP INSTITUTE

MONTHLY ACTIVITY REPORT

JANUARY 1994

1. Teaching activity

course	date	module	faculty	hrs.	particip.
Basic Course Training for Entrepre-preneurs	20.I	Comp.applic.	M.Kaczan	5	10
	21.I	Strategic Planning	A.Chmielak M.Cywoniuk	5	10
	27.I	Entrepreneur.	A.Dakowicz	5	10
	6. I	Negotiations	A.Dakowicz B.Plawgo	5	10
	7,13,14	Management	J.Paszkowski	15	10
Number of teaching hours: 350					
One Year Management Course	8, 9	Marketing		12	30
	22,	Finance		6	30
	23 I	Business Law		6	30
Number of teaching hours: 720					
One Year Tax Course	8, 9 22,23 I	Taxes		24	28
Number of teaching hours: 672					
Tax seminar in Suwałki	21.I			4	31
Number of teaching hours: 124					
Tax Course in Bielski Podlaski	19- -20		L.Etel J.Kownacki	8	12
Number of teaching hours: 96					
Marketing Workshop in Poznań				16	2
Number of teaching hours: 32					

Number of consulting hours [5 % of t-hrs.]: 100

Total number of teaching and consulting hours: 2.094

2. We promoted next edition of Basic Course.
3. John Turner's Visit
   * working on Human Res. Mgt. t-outline,
   * participation in classes,
   * testing e-male
4. We prepared 60 Sucess Stories and we were working on case studies
5. Dinner with entrepreneurs [business owners recived certificates]

BIAŁYSTOK SCHOOL OF BUSINESS
ENTREPRENEURSHIP INSTITUTE

MONTHLY ACTIVITY REPORT

FEBRUARY 1994

1. Teaching activity

course	date	module	faculty	hrs.	particip.
Basic	12.II	Business Law	M.Łapiński	3	28
Course	12.II	Finance	Maksymiuk	3	28
One Year	13.II	Entrepreneur.	K.Lipska	3	28
Management	13.II	Entrepreneur.	A.Kamińska B.Kazberuk	3	28
Course	26.II	Business Law	M.Łapiński	3	28
	26.II	Finance	Maksymiuk	3	28
	27.II4	Entrepreneur.	K.Lipska A.Kamińska B.Kazberuk	6	28
Number of teaching hours: 572					
One Year Tax Course	5, 6 19,20 I	Taxes	J.Kownacki G.Michalczuk A.Dyhdalewicz	32	28
Number of teaching hours: 896					
Marketing Course in Bielski Podlaski	3-19	Mark.(56) Fin.(8) Man.(8)	J.Paszkowski A.Walicki A.Kopczuk	72	26
Number of teaching hours: 1872					
Retailing Workshop in Poznań	7-18			14	1
Number of teaching hours: 14					
Selling Workshop in Rzeszów	11-12			8	1
Number of teaching hours: 8					
Retailing Seminar in Białystok	21-22			7	10
Number of teaching hours: 70					
Secretarial School		Entr.	M.Cywoniuk O.Gierba S.Ejsmont M.Kaczan J.Gierba A.Kondracka D.Małaszkiewicz	48	28
		Finance	G.Michalczuk E.Roszkowska	23	28
		Marketing	A.Walicki K.Kaczynska	8	28
		Management	J.Paszkowski	4	28
Number of teaching hours: 2324					

Number of consulting hours [5 % of t-hrs.]: 288

Total number of teaching and consulting hours: **6.044**

2. Dr John Turner's from the Ohio State University visit in Białystok

* during the second week of his stay in Białystok keep working on testing e-mail for E.I.

*cooperation in working out programme for Human Resource Managment seminar.

*visitation at school

*visit in "Everest" firm

*partisipation in a party for entrepreneurs organized at the end of the course

3.Our faculties participated in three workshops:

*Individual Selling - in Rzeszów

*Retailing - in Poznań

*Retailing - in Białystok

4.18-19 February-the coordinators of the project participated in two meetings in Warsaw;

*Task Force meeting

*Coordinators meeting

5.Analysing "success stories"cases base on datas coming from the questionnaire

6.20-23 February - visit of Dr Catherine Ashmore and Prof. Wayne Talarzyk from the Ohio State University in Białystok.

*Prof.Talarzyk's lecture about Retailing

*visitation at school and Institute

*meeting with faculties

.....

Andrzej Jurgilewicz
Coordinator

BIAŁYSTOK SCHOOL OF BUSINESS ENTREPRENEURSHIP INSTITUTE

MONTHLY ACTIVITY REPORT

MARCH 1994

1. Teaching activity

course	date	module	faculty	hrs.	particip.
Basic Course One Year Management Course	12	Finance	N. Maksymiuk	3	28
	12	Labour Law	B. Cudowski	3	28
	12,13	Strategic Plan.	W. Jeżak	12	28
	13	Entrepreneurship	. Żuchowski	3	28
	26	Business Law		3	28
	26	Finance		3	28
	27	Business and Strategic Plan		6	28
Number of teaching hours: 924					
One Year Tax Course	5, 6 19,20	Accountancy	A. Dyhdalewicz G. Michalczuk E. Maliszewska	32	28
Number of teaching hours: 896					
Running a Business Course in Suwałki	1-11	Marketing	J.Paszkowski A.Walicki	60	10
		Managment	J.Paszkowski		
		Finance	Ołdakowski		
		Business Law	Kondracka		
			Sobolewskai		
		Taxes	Helbrych Janusz		
Number of teaching hours: 600					
Income-Tax Seminar in Łomża	18	Preferences Application Form	Poznański Kownacki	6	6
Number of teaching hours: 36					
Finance Seminar in Suwałki	21		G.Michalczuk	6	10
Number of teaching hours: 60					
Human Resource Managment Seminar in Białystok	15,16		prof.Pukniel prof.Turner	6	6
Number of teaching hours:36					
Business Computer Application Course for Students of the First, Second and Third Year From Suwałki			Małaszkiewicz Konopko	12	60
	8,9,10			9	40
	14,15,16,17,18			9	40
	21,22,23,24,25				
	29,30,31				
Number of teaching hours: 1440					

Number of consulting hours [5 % of t-hrs.]: 200

Total number of teaching and consulting hours: 4.192

2. Dr John Turner s from the Ohio State University stay in Białystok.

* 2-day seminar for staff on topic "Human Resource Managment"

  * working out the frames of the futher seminar

  * participation in lecture on topic "Strategic Plan" organized for the students of the One Year Managment Course

  * visit in English classes

3. 5-March - Official celebration at the end of Secretarial School.

4. Start new course - Business Computer Application for the students from Suwałki

5. 8-March - conference of Advisory Committe of Entrepreneurship Instiute.

6 .11-March - meeting in Warsaw the coordinators of E.I. responsible for project sponsored by U.S. Agency for International Development.

.....
Andrzej Jurgilewicz
coordinator

Białystok
Entrepreneurship
Institute

Financial Report
February 1994

	EXPENCES						
	U.S. AID			RESERVE			
	plan.	real	dif.	plan.	real	dif.	
salaries: coordin.	900	900	0	1000	1000	0	
salaries: secretary	300	340	+ 40	-	-	-	
salaries: faculty	1500	791	- 709	-	-	-	
trips	100	70	- 30	-	-	-	
materials	200	356	+ 156	-	-	-	
translations	0	0	0	-	-	-	
promotion	230	237	+ 7	-	-	-	
office:-rent, phone -equipment	- -	- -	- -	100 0	52 0	- 48 0	
Total:	3230	2694	- 536	1100	1052	- 48	- 584
Satelite Cities		4712					
Workshops		103					

1 USD = 20.960 PLZ

July 1933 - February 1994

	EXPENCES						
	U.S. AID			RESERVE			
	plan.	real	dif.	plan.	real	dif.	
salaries: coordin.	7200	7200	0	8000	8000	0	
salaries: secretary	2400	2697	+ 297	-	-	-	
salaries: faculty	12000	8209	-3791	-	-	-	
trips	800	982	+ 182	-	-	-	
materials	900	1265	+ 365	-	-	-	
translations	300	0	- 300	-	-	-	
promotion	2152	1910	- 242	-	-	-	
office:-rent, phone -equipment	- -	- -	- -	600 6816	632 3165	+ 32 -3651	
Total:	25752 25752	22263	-3489	15416	11797	-3619	- 7108
Satelite Cities	20000	14597	-5403				
Workshops	5000	2839	-2161				

Coordinator Andrzej Jurgilewicz ... JURGILEWICZ

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Quarterly Report

Location: BIAŁYSTOK

Dates: JANUARY – MARCH, 1994

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship			10 6 27	10 30 28	1036	52
Marketing			12 56	30 26	1816	91
Management			20 8	10 26	408	20
Finance			6 / 6 3 / 6 3 / 12 3	30 / 6 31 / 10 12 / 28 26	1040	52
Strategic Planning			5 18	10 28	554	28
Export/Import						
Faculty Training			7 22 16 6	10 1 2 6	160	8
Bankers/Government						
Media RADIO TV						6 6
Business Start-up			60	10	600	30
Students (Traditional)			83 12 18	28 60 40	3764	188
Business Managers			88	28	2464	123
Other (Describe on back)						
Other (Describe on back)						
TOTAL					11842	600

BEST AVAILABLE DOCUMENT

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

Institution: BIAŁYSTOK ENTREPRENEURSHIP INSTITUTE

Quarter: JANUARY - MARCH 1994

Contact Person Regarding this Report: ANDRZEJ JURGILEWICZ

Project Component

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER: 12.446

STUDENT CONTACT HOURS	MANAGMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	160		8			BIAŁYSTOK POZNAŃ RZESZÓW
Students (Traditional)	3764		188			BIAŁYSTOK
Government Officials						
Business Community/ Business Managers	7318		366			BIAŁYSTOK, SUWAŁKI ŁOMŻA, BIELSK PODLASKI
Journalists - Media			12			BIAŁYSTOK
Other Groups/Individuals Business Start-up	600		30			SUWAŁKI
Other Groups/Individuals						
Other Groups/Individuals						

COMMENTS:

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TOTAL HOURS FOR THE POLISH-AMERICAN ENTERPRISE INSTITUTE in Białystok

	Year I		Year II		Year III					
					Quarter 1		Quarter 2		Quarter 3	
Course:	Training	Consulting	Train.	Consult.	Train.	Consult.	Train.	Consult.	Train.	Consult.
Total Institute Program	*920	*80	*162	*67						
Entrepreneurship			864	26			627	32	1,036	52
Marketing			820	28			715	36	1,816	91
Finance			1.762	48			671	33	1,040	52
Strategic Planning			280	10			297	15	554	28
Management			804	26			704	36	408	20
Export Import			256	9			154	8		
Faculty Training	1,320	240	560				320	13	160	8
Bankers/Government	208					20		96		
Media		150		18		6		24		12
Business Start-up	3,845	10	2,390				1,152	58	600	30
Students							2,592	26	3,764	188
Business Managers			3,100	162	970	80	1,837	92	2,464	123
Other										
Total	6,293	480	15,498	394	970	106	9,069	469	11,842	604

* The total series were included as one course in the original reporting system.

Poznan

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Polsko-Amerykański Instytut Przedsiębiorczości
sponsor: US Agency for International Development
ul. Powstańców Wlkp. 16, tel./fax 54-35-21
60-967 Poznań

Report on the Activities of the Polish – American Enterprise Institute in Poznań
January 1994

1. On January 8th, another edition of the " Successful company management in a competitive environment " workshop was commenced.
   The 150–hour workshop comprises the following modules: entrepreneurship, finance, marketing, strategic management, import – export.
   The workshop has attracted 14 participants, all of them business owners.

2. Between January 14–15th, the Institute organized a seminar, part of the Marketing module. The main objective of the seminar was to exchange experience on teaching marketing between representatives of the three enterprise institutes.

3. Between January 8 – 21st, the Institute hosted John Turner. Enclosed is the schedule of his visit.

4. At the direction of the Automatics and Telecommunication Works of the Polish Railways, we organized a training on " Basic Computer Operations ". The training attracted 10 participants.

5. On January 21st, the Institute purchased 4 computers for training purposes.

DYREKTOR INSTYTUTU
dr Zdzisław Krajewski

Report on Activities of the Polish-American Enterprise
Institute in Poznań - February 1994

1. The continuation of the workshop "Successful Company Management in a Competitive Environment" which attracted 14 participants. The Finance Module was commenced on February 2, 1994.

2. Between February 21-25 the Institute organized 50-hour seminar for employees of PKO BP (Polish Bank). The seminar attracted 22 participants - employees who were responsible for evaluating credit applications.

3. Between February 16-17 the Institute conducted a seminar "Retail Management". It attracted 8 participants.

4. Each Friday the coordinators of the project met with managers of newly established satellite centers to discuss currents matters related to the project management.

5. Between February 18-19 coordinators of the Institute attended Task Force meeting with Cathy Ashmore in Warsaw.

Polsko-Amerykański Instytut Przedsiębiorczości
sponsor: US Agency for International Development
ul. Powstańców Wlkp. 16, tel./fax 54-35-21
60-967 Poznań

Sprawozdanie z działalności Polsko–Amerykańskiego Instytutu Przedsiębiorczości.

Luty 1994.

1. Kontynuacja warsztatów szkoleniowych "Jak skutecznie kierować własną firmą w warunkach konkurencji". W warsztatach uczestniczyło 14 przedsiębiorców. W dniu 6.02.1994 rozpoczęto realizację modułu "Finanse".

2. W dniach 21 – 25 lutego zrealizowano szkolenie dla pracowników banku PKO BP. Szkolenie trwało 50 godzin. W szkoleniu uczestniczyło 22 pracowników banku PKO BP zajmujących się głównie oceną wniosków kredytowanych firm.

3. W dniach 16 –17 lutego Instytut zorganizował seminarium "Zarządzanie handlem detalicznym". W seminarium uczestniczyło 8 osób.

4. W każdy pierwszy piątek miesiąca koordynatorzy spotykają się z kierownikami Filii i omawiają funkcjonowanie i problemy poszczególnych oddziałów.

5. W dniach 18 –19 lutego koordynatorzy Instytutu uczestniczyli w spotkaniu Task Force z C. Ashmore w Warszawie.

DYREKTOR INSTYTUTU

dr Zdzisław Krajewski

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Report on Activities of the Polish-American Enterprise
Institute in Poznań - March 1994

1. The continuation of the workshop "Successful Company Management in a Competitive Environment". Marketing Module was conducted on March 19 and attracted 16 participants.

2. March 11, 1994 the Institute started new seminar "Postgraduate Study in the Area of Cooperative Banking" organized for Wielkopolski Economic Bank. It was 150-hour seminar conducted by the faculty of PAEIP which used the Institute's materials. The seminar attracted 18 persons.

3. March 4, 1994 the Institute hosted Mr Donald Pressley from the U.S. AID Office who attended a meeting with the Institute's coordinators - Dr. Zdzisław Krajewski, Łukasz Pawelczak, Ms Magdalena Wyganowska, Dr. John Turner and R. Polcyn. During that meeting the coordinators presented the current situation of the Institute and its plans for future development.

4. March 3, 1994 the Institute hosted the representative of Solidarity Foundation Ms Alicja Unterschuetz.

5. March 30, 1994 the Institute signed an agreement with Konin Municipal Council about writing a business plan for the Prefabricated Elements Factory.

Sprawozdanie z działalności Polsko-Amerykańskiego Instytutu Przedsiębiorczości.

Marzec 1994.

1. Kontynuacja warsztatów szkoleniowych "Kierowanie własną firmą w warunkach konkurencji". W dniu 6 marca zakończono realizację modułu "Finanse". W dniu 19 marca 1994 rozpoczęto realizację modułu "Marketing". W szkoleniu uczestniczyło 16 przedsiębiorców.

2. W dniu 11.03.1994 rozpoczęto szkolenie "Pomaturalne Studium Bankowości Spółdzielczej" na zlecenie Gospodarczego Banku Wielkopolski. W szkoleniu uczestniczyło 18 osób. Całe szkolenie obejmuje 150 godzin zajęć. Szkolenie prowadzone jest przez wykładowców PAIP oraz wykorzystywane są materiały szkoleniowe Instytutu.

3. W dniu 4.03 1994 wizytę w Instytucie złożył pan Donald Pressley z USAID. W spotkaniu uczestniczyli:

- dr Z.Krajewski
- prof J.Turner
- mgr Ł.Pawelczak
- p. M. Wyganowska
- p. R. Polcyn

Koordynatorzy Instytutu przedstawili aktualną sytuację PAIP oraz perspektywy jego dalszego funkcjonowania.

4. W dniu 11.03.1994 wizytę w Instytucie złożyła kierownik projektu z F.G."Solidarność" p. Alicja Unterschuetz.

5. Dnia 30.03 1994 podpisano umowę z Urzędem Wojewódzkim w Koninie dotyczącą opracownia business planu dla Zakładów Elementów Prefabrykowanych.

DYREKTOR INSTYTUTU

dr Zdzisław Krajewski

Quarterly Report

Location: Poznań

Dates: 1st Jan. 1994 – 31st March 1994

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship	Business Managers	8.01.94	30	14	420	10
Marketing	— " —	19.03.94	30	16	480	5
Management	—	—	—	—	—	—
Finance	— " —	6.02.94	30	14	420	12
Strategic Planning	—	—	—	—	—	—
Export/Import	—	—	—	—	—	—
		Total :		1320		
Faculty Training	Marketing seminar Retail management	14-15 01.1994	16 16	12 8	192 128	
Bankers/~~Government~~	Bank employees Marketing sem	21-25 02.1994	50	22	1100	
Media	Undergraduate Bank College Marketing sem.	11.03 26.03	21	18	378	
Business Start-up	—	—	—	—	—	
Students (Traditional)	—	—	—	—	—	
Business Managers	—	—	—	—	—	
* Other (Describe on back)	computer training	10.01.94	50	10	500	
Other (Describe on back)	—	—	—	—	—	

Total: 2298 + 1666 (branches) = 3964

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

Institution: SGH-Poznan, Poland

Quarter: III / 3rd yr

Contact Person Regarding this Report: Z. Krajewski, L. Pawelczak

Project Component: Ohio State University

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

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STUDENT CONTACT HOURS	MANAGMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	320					Poznan
Students (Traditional)						
Government Officials						
~~Business Community~~/ Business Managers	1320		27			Poznan
Journalists - Media						
Other Groups/~~Individuals~~ computer				500		Poznan
Other Groups/Individuals bankers				1478		Poznan
Other Groups/Individuals see the other side				1666		Konin, Gondz, Leszno, Gniezno

COMMENTS: Bankers group : 1100 + 378 = 1478
Faculty Training - Management seminar : 192 hrs + Retailing seminar : 128 = 320 hrs

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Rzeszow

POLSKO-AMERYKAŃSKI INSTYTUT
PRZEDSIĘBIORCZOŚCI
POLISH-AMERICAN
SMALL BUSINESS INSTITUTE
35-030 Rzeszów, ul.Zygmuntowska 2a, tel./fax;(0 17)328-58
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

FUNDACJA GOSPODARCZA
NSSZ "SOLIDARNOSC"
A.UNTERSCHUETZ

RZESZÓW 28-01-1994

ACTIVITY UNDERTOOK BY POLISH-AMERICAN SMALL BUSINESS INSTITUTE

IN RZESZÓW

JANUARY 1994

1. Organizing and managing the current Institute activity.

2. Organizing meetings with teachers hired by Institute.

3. Preparing the materials from USA on selling, team building.

4. Participating in team working out economic-finanse analysis of Industrially-Land Works, Sieniawa.

5. Continuation of teaching course in Przemyśl-Dubiecko for representatives of Co-operative Banks.

6. Representing the Institute on the meeting with entrepreneurs members of the Association of the Entrepreneurs SBI Century Club and with members of the Regional Business Counsel and Regional Members of Commerce.

7. Continuation of post-diploma studies in Rzeszów, in cooperation with Economic Department, Maria Curie-Skłodowska University in Rzeszów.

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8. Continuation of the course for entrepreneurs in Rzeszów.

9. Organizing the next teaching course of the investment strategies in Rzeszów and Przemyśl.

10. Furnishing entrepreneurs with individual consultation - about 20 consultations.

11. Participating in meeting with the General Consul of the United States of America, Dianne E.Markowitz, Kraków on January 14, 1994.

12. Organizing the participation of Rzeszów faculty in marketing seminar in Poznań, on 13-15 January 1994.

13. Training new coordinators from Satelite in Krosno, Przemyśl and Leżajsk.

14. Preparing schedule for dr John Torner stay in Rzeszów in February 1994.

K. Kaszuba

A. Góral

POLSKO-AMERYKAŃSKI INSTYTUT
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FUNDACJA GOSPODARCZA
NSSZ "SOLIDARNOSC"
A. UNTERSCHUETZ

RZESZÓW 28-02-1994

ACTIVITY UNDERTOOK BY POLISH-AMERICAN SMALL BUSINESS INSTITUTE

IN RZESZÓW

FEBRUARY 1994

1. Organizing and managing the current Institute activity.

2. Organizing meetings with teachers hired by Institute.

3. Preparing the materials from USA on selling, team building.

4. Participating in team working out economic-finanse analysis of Industrially-Land Works, Sieniawa.

5. Continuation of teaching course in Przemyśl for representatives of SANWIL firm.

6. Representing the Institute on the meeting with entrepreneurs members of the Association of the Entrepreneurs SBI Century Club and with members of the Regional Business Counsel and Regional Members of Commerce.

7. Continuation of post-diploma studies in Rzeszów, in cooperation with Economic Department, Maria Curie-Skłodowska University in Rzeszów.

8. Continuation of the course for entrepreneurs in Rzeszów.

9. Organizing the meeting with vice-consul United States of America, Mr. Andrew H. Hogenboom.

10. Furnishing entrepreneurs with individual consultation - about 20 consultations.

11. Participating in Task Force and coordinators meetings in Warsaw, 18-19 Feb. 1994.

12. Organizing the participation of Rzeszów faculty in Retailing seminar in Poznań, on 16-17 February 1994.

13. Training new coordinators from Satelite in Krosno, Przemyśl and Leżajsk.

14. Organizing the stay of dr John Tarner in Rzeszów in 7-20 February 1994.

15. Organizing the new seminar "selling" in Rzeszów, 13-14 Feb. 94

16. Organizing the stay of Prof. W. Talarzyk and Dr. Cathy Aschmore in Rzeszów, 23-27 Feb. 1994.

17. "Retailing" seminar in Przemyśl and Rzeszów, 25-26 Feb. 1994

18. Preparing teaching materials on selling and finance.

K. Kaszuba

A. Góral

POLSKO-AMERYKAŃSKI INSTYTUT
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PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

FUNDACJA GOSPODARCZA
NSSZ "SOLIDARNOSC"
A.UNTERSCHUETZ

RZESZÓW 28-03-1994

ACTIVITY UNDERTOOK BY POLISH-AMERICAN SMALL BUSINESS INSTITUTE

IN RZESZÓW

MARCH 1994

1. Organizing and managing the current Institute activity.
2. Organizing meetings with teachers hired by Institute.
3. Preparing the materials from USA on selling, team building.
4. Continuation of teaching course in Przemyśl for representatives of SANWIL firm.
5. Representing the Institute on the meeting with entrepreneurs members of the Association of the Entrepreneurs SBI Century Club and with members of the Regional Business Counsel and Regional Members of Commerce.
6. Continuation of post-diploma studies in Rzeszów, in cooperation with Economic Department, Maria Curie-Skłodowska University in Rzeszów.

7. Continuation of the course for entrepreneurs in Rzeszów and Krosno.

8. Representing the Institute on the meeting with ministry of privatization W.Kaczmarkiem and representatives of European Union and Polish Agency of Regional Development.

9. Participating in Regional Fotum in Rzeszów - 3rd March 1994.

10. Organizing the meeting with representatives of Taiwan Development Association.

11. Furnishing entrepreneurs with individual consultation - about 20 consultations.

12. Training new coordinators from Satelite in Krosno, Przemyśl and Leżajsk.

13. Organizing the stay of dr John Tarner in Rzeszów in 21-31 March 1994.

14. Working on e-mail system in Rzeszów Institute.

K.Kaszuba

A.Góral

JANUARY, FEBRUARY, MARCH 1994

Quarterly Report III rd

Location: RZESZÓW

Dates: 30.03.1994

Course	Target Audience	Dates Offered	Hours per course	No. of Students	Total Hours	Total Consulting Hours
Total Institute Program						
Entrepreneurship		FEB-MARCH	30	14	420	
Marketing		FEB-MARCH	15	15	225	
Management		FEB-MARCH	15	15	225	
Finance		FEB-MARCH	20	15	300	
~~Strategic Planning~~ SELLING		FEB-MARCH	10 4	6 40	60 160	
~~Export/Import~~ RETAILING		FEB	6	15	90	
Faculty Training		JAN, FEB, MARCH				604
Bankers/Government						
Media						30
Business Start-up		FEB-MARCH	60	15	900	
Students (Traditional) POST-GRADUATE		JAN-MARCH	80	62	4960	
Business Managers		JAN-MARCH	30	15	450	200
Other (Describe on back)						
Other (Describe on back)						
INVESTORS		JAN-MARCH	30	70	2100	

DYREKTOR
Krzysztof Kasznia

BEST AVAILABLE DOCUMENT

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

Institution: RZESZÓW SMALL BUSINESS INSTITUTE

Quarter: III rd JANUARY FEBRUARY MARCH 1994

Contact Person Regarding this Report: KRZYSZTOF KASZUBA

Project Component: _____

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER: 9430

STUDENT CONTACT HOURS	MANAGMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER FINANCE	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)			60			PRZEMYŚL-KROSNO RZESZÓW-LEŻAJSK
~~Students (Traditional)~~ POST GRADUATE	3000	1000		960		RZESZÓW
Government Officials						
Business Community/ Business Managers	1770		200	310		RZESZÓW - KROSNO PRZEMYŚL
Journalists - Media			30			RZESZÓW
Other Groups/Individuals INVESTORS				2100		RZESZÓW - PRZEMYŚL
Other Groups/Individuals						
Other Groups/Individuals						

COMMENTS: Good quarter.

DYREKTOR Krzysztof Kaszuba

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999.

POLSKO-AMERYKAŃSKI INSTYTUT
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POLISH-AMERICAN
SMALL BUSINESS INSTITUTE
35-030 Rzeszów, ul.Zygmuntowska 2a, tel./fax;(0 17)328-58
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QUANTITATIVE DATA – RZESZÓW

JANUARY, FEBRUARY, MARCH 1994

EXPLANATARY NOTES

1. Course for entrepreneurs

RZESZÓW	- 30 h	x	14 participants	=	420 h
KROSNO	- 60 h	x	15 participants	=	900 h
PRZEMYŚL	- 30 h	x	15 participants	=	450 h

2. Course for investors

PRZEMYŚL	- 30 h	x	45 participants	=	1 350 h
RZESZÓW	- 30 h	x	25 participants	=	750 h

3. Post graduate study in cooperation with Maria Curie-Skłodowska University

managemant	- 80 h	x	32 participants	=	2 560 h
banking	- 80 h	x	30 participants	=	2 400 h

4. Selling course

RZESZÓW	- 10 h	x	6 participants	=	60 h
	4 h	x	40 participants	=	160 h

5. Retailing cours

PRZEMYŚL	- 6 h	x	15 participants	=	90 h

6. Training faculty — 60 h

7. Consultation for entrepreneurs — 200 h

8. Journalists + media (TV, Radio) — 30 h

Total: 9 430 h

DYREKTOR
Krzysztof Kaszuba

400

POLSKO-AMERYKAŃSKI INSTYTUT
PRZEDSIĘBIORCZOŚCI
POLISH-AMERICAN
SMALL BUSINESS INSTITUTE
35-030 Rzeszów, ul.Zygmuntowska 2a, tel./fax;(0 17)328-58
PKO BP/I ODDZ. w Rzeszowie, konto nr 69515-31453-132

INSTITUTE FINANCIAL REPORT

RZESZÓW

QUARTER	Ist JULY, AUGUST SEPTEMBER 1993	IInd OCTOBER, NOVEMBER DECEMBER 1993	IIIrd JANUARY, FEBRUARY MARCH 1994
AID INCOME (USD)	17 500	22 500	22 500
AID EXPENSES (USD)	7 809,89	24 736,45	25 532,24
OTHER INCOME (USD)	1 714,02	8 135,25	4 650,09
OTHER EXPENSES (USD)	3 018,21	2 647,75	3 224,56

Krzysztof Kawka

TOTAL HOURS FOR THE POLISH-AMERICAN ENTERPRISE INSTITUTE in Rzeszów

	Year I		Year II		Year III					
					Quarter 1		Quarter 2		Quarter 3	
Course:	Training	Consulting	Training	Consulting	Train.	Consult.	Train.	Consult.	Train.	Consult.
Total Institute Program	*10,200	*560	*600	*40						
Entrepreneurship Computers			1,740	130	400		660		420	
Marketing: - Selling - Retailing			1,440	70	60		600		225 220 90	
Finance			1,460	100	480		2,800		300	
Strategic Planning			1,800	240			220			
Management			1,160	20			2,120		225	
Export Import			360	10			300	80		
Faculty Training	1,320	240	840	100	80			100		60
Bankers/Government	120					300		20		
Media		40	20	50	20					30
Business Start-up	1,300	32							900	
Business Managers			1,472	200	300	200		200	450	200
Other High School Students			90							
Other Post Graduates			5,300				2,220		4,960	
Other: Investors							330		2,100	
Total	12,940	872	16,782	1,040	1,340	500	9,250	400	9,140	290

* The total series were included as one course in the original reporting system.

ENTREPRENEURS PROFILES
Rzeszów

Name (1)	Address (2)	Company Name (3)	Type of Business (4)	Number of Employees (5)	Education & Training Background: - highest level - specialty (6)	Job Description (7)	Total Hours* (8)
1. Zenon Wajda	Misztale 38 Jarosław	"Jarlan" S.A.	textile production	3,000	- University - economist	specialist in selling	150
2. Wiesław Chorzępa	Paderewskiego 1/20; Rzeszów	"Euromed"	drugs wholesale	45	Academy of Phisical Education	sales manager	150
3. Jarek Noga	Niepodległości 13/25 Rrzeszów		private trade company		Academy of Agriculture Horticulture engineer		150
4. Wanda Hubert	Goździkowa 8/4 Rzeszów	"Budowlanych"	housing cooperative	10	Technical University of Cracow; engineer	director	150
5. Anna Zwierzyk	Goździkowa 8/3 Rzeszów	"ROSSA" Ltd.	promotion company	100	Technical University of Cracow; engineer	shareholder, specialist in investments	150
6. Bieleń Julian	Smugowa 11 37-433 Bojanów	-	-	-	Engineering College of Lublin; engineer	unemployed	150
7. Grudzień Mariusz	Langiewicza 38 35-101 Rzeszów	"Wspólnota Polska"	association	10	M. Curie-Skłodowska University; lawer	director	150
8. Franciszek Bącal	Mikołajczyka 11/8 Rzeszów		service company	90	Academy of Agriculture economist	manager	150
9. Zbigniew Matych	Łąkowa 3 39-200 Dębica	"Polifarb"	production	700	Technical College engineer	manager	150
10. Andrzej Wójcik	Węglówka 151 38-408 Rzeszów		design-construction company		Academy of Mining and Metallurgy; engineer	engineer	150
11. Zbigniew Andruszek	Zamoyskiego 54/32 22-400 Zamość	-	-	-	-	unemployed	150

(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
12. Marek Kijowski	29 Listopada 13 Ustrzyki Dolne	"Marbol"	trade, services	24	University economist	proprietor	150
13. Anna Krysa	Szczebrzeska 41 22-400 Zamość	ZSM	high school		M.Curie-Skłodowska University; economist	teacher	150
14. Wojciech Chmura	Pułaskiego 9/59 35-011 Rzeszów	EXBUD	housing company	120	Engineering College of Rzeszów	engineer	150
15. Dorota Szpunor-Ciba	Sonina 500 A	Bureau of Treasury		50	Academy of Agriculture engineer	official	150
16. Magdalena Maksiewicz	Ossolińskich 27 35-618 Rzeszów	Primary School 15		30	Pedagogical College	teacher	150
17. Dariusz Zima	Świętosława 52 39-200 Dębica	WUCH Dębica	factory of refrigirator	1500	Engineering College engineer	instructor	150
18. Janusz Para	Jagiellońska 3/10 37-200 Przetworsk	City Council, Przewask	self-government	31	Engineering College engineer	Secretary of the Town	150
19. Krystyna Gancarz Maciołek	Sikorskiego 8 Rzeszów	Res-Bryt	limited liability	7	Academy of Agriculture	Director	150
20. Bolesław Bujak	Żeromskiego 5/16 Ropczyce	City Council	administration		University of Law - lawer	Chief Officer	150
21. Piotr Kowalski	AK 14/5 36-030 Błażowa	"Wspólnota Polska" Association	education, services		Engineering College engineer	engineer	150
22. Jolanta Piesiak	Podwisłocze 38/118 Rzeszów	Moto-Styl	housing company	14	Engineering College of Wrocław; biomedical engineer	Director's Assistance	150
23. Wojciech Rączka	Szkolna 14/6 38-200 Jasło	"Gamrat"	plastic manufacturing	2,500	Engineering College of Rzeszów; engineer	master of production	150
24. Piotr Paczosa	Akacjowa 48 35-113 Rzeszów	"POLFA"	drugs works	500	Medical Academy	Research and Development Division	150
25. Lesław Wojnar	Osmęckiego 57/1 Rzeszów	Sanitation Company	production	400	Engineering College	Vice-Director for production	150
26. Jacek Rydz	Gwardii Ludowej 9B/24 Mielec	Poultry-Breeder's Works	production and trade	610	Academy of Agriculture; economist	manager	150

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(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
27. Andrzej Ziemniak	Żurawica	Municipal Company	service - production	200	Academy of Agriculture economist	vice-President	150
28. Teresa Kędra	Pulanek 6/16 36-020 Tyczyn	UMC			University	manager	140
29. Maria Staszowa	Gen. Sikorskiego 3 23-300 Janów Lubelski	Bank S.A.	Company Ltd.	30	M.Curie-Składowska University; economist	director	140
30. Wiesława Grzyb	Cytadeli Warsz. 3 35-328 Rzeszów	NBP - Bank		150	Engineering College engineer		140
31. Robert Kiełbowicz	Poręby Dębskie	-	-	-	Pedagogical University; teacher	unemployed	140
32. Czachor Artur	B. Chrobrego 3	High School of Agriculture		50	Jagiellońian University	teacher	140
33. Bogdan Salach	Rudna Mała 211 36-054 Mrowla	PKO-Polish Guardian Bank	Ltd.	100	Academy of Agriculture economist		140
34. Waldermar Długosz	Oś. Gen. St. Maczka 17/7 Łańcut	-	-	-	Academy of Agriculture ecnomist	unemployed	140
35. Roman Dec	Ks. Jalowego 16a/1 35-010 Rzeszów	Bank Ltd.		42	M.Curie-Skłodowska University; economist		140
36. Elżbieta Czapczyńska	Starzyńskieo 7/27 Rzeszów	-	-	-	Engineering College engineer	unemployed	140
37. Ewa Sawk-Rauch	Sikorskiego 12/13 39-200 Dębica	Bank		50	M.Curie-Skłodowska University; economist	loans inspector	140
38. Halina Gębarowska	Albigowa 897 68-204 Łańcut	"Polmos"	liquor production	650	Academy of Economics	manager	140
39. Marta Bochenek	Krzyżanowskiego 16/13 Rzeszów	Bank		145	Academy od Economics economist	specialist	140
40. Wojciech Michnik	Orelec 65; Uherz	High School		50	Jagiellonian University math teacher	teacher	140
41. Krystyna Semen	M. Kolbego 3/9 Rzeszów	Bank		145	Engineering College of Rzeszów; engineer	specialist	140

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(1)	(2)	(3)	(4)	5)	(6)	(7)	(8)
42. Mirosław Sarna	Malwowa 3/2 Rzeszów	"Syndyk"	privatizing services	3	Engineering College engineer	employee	150
43. Elżbieta Drożdż	Łukasiewicz 3 Krosno	Food Processing Company	production and services	4	M.Curie-Skladowska University; economist	economist	140
44. Michał Mona	Bielskiego 56/19	Sanwil	production	470	High school	technician	100
45. Andrzej Słapczyński	Glazera 34/6 37-700 Przemyśl	Sanwil	production	470	University chemist	production manager	100
46. Grażyna Szubartowska	Grunwaldzka 121/113 37-700 Przemyśl	Sanwil	production	470	University chemist	supervisor	100
47. Maria Jankowska	Kościuszki 82 37-700 Przemyśl	Sanwil	production	470	Engineering College chemist	vica-manager	100
48. Jerzy Grabowski	Zielińskiego 13 Przemyśl	Sanwil	production	470	Engineering College chemist	manager	100
49. Kozak Grażyna	Lwowska 52 Przemyśl	Sanwil	production	480	Engineering College chemistry-engineer		100
50. Halina Skórka	Lwowska 53 Przemyśl	Sanwil	production	480	High School		100
51. Grażyna Koweszko	Sikorskiego 3/26 Przemyśl	Sanwil	production	488	Engineering College chemist		100
52. Małgorzata Pikor	Krakowska 18d/41 Rzeszów	Savings Bank		40	University economist	manager	140
53. Wanda Kluz	Krasińskiego 16/2 37-700 Przemyśl	Sanwil	production	500	University economist	economist	100
54. Tadeusz Nowicki	Glawera 3/3 Przemyśl	Sanwil	production	472	High School	technician	100

Białystok
Entrepreneurship
Institute

INCOME
[Training Fees]

1] July-December 1993

168.082.000 PLZ = 8.541 USD [1 USD = 19.679 PLZ]

2] January - March 1994

173. 080.500 PLZ = 8.258 USD [1 USD = 20.960 PLZ]

Total: 16.799 USD

STUDIA RAZ JESZCZE

CZY WIESZ CO ŁĄCZY
MENEDŻERÓW GENERAL MOTORS, IBM, PHILIP MORRIS?

-CIĄGŁE ODNAWIANIE I UZUPEŁNIANIE WIEDZY Z ZAKRESU EKONOMII, FINANSÓW, ZARZĄDZANIA, MARKETINGU, itd.

Jeśli posiadasz dyplom ukończenia szkoły wyższej ZAPRASZAMY!

WYDZIAŁ EKONOMICZNY FILII UMCS

W RZESZOWIE WE WSPÓŁPRACY Z OHIO STATE UNIVERSITY REPREZENTOWANYM PRZEZ POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI W RZESZOWIE OGŁASZA NABÓR NA 2-SEMESTRALNE

STUDIA PODYPLOMOWE

NA KIERUNKACH:

- **MENEDŻERSKIM** (CENA I SEMESTRU 5 MLN. ZŁ)
- **BANKOWOŚCI** (CENA I SEMESTRU 7 MLN. ZŁ)

Informacje i zgłoszenia: Dziekanat Wydziału Ekonomicznego Filii UMCS w Rzeszowie, ul. Grunwaldzka 13, tel. 628-114, wewn. 22
TERMIN SKŁADANIA DOKUMENTÓW (podanie, kserokopia dyplomu ukończenia studiów wyższych, 3 zdjęcia) - 15 luty 1994
Pierwszy zjazd 11, 12 marzec 1994

Masz już akcje Banku Śląskiego
pragniesz kupić następne i co dalej?

JAK INWESTOWAĆ NA GIEŁDZIE

- *RYNEK KAPITAŁOWY BEZ TAJEMNIC (GIEŁDY, BIURA MAKLERSKIE, AKCJE, OBLIGACJE, FUNDUSZE POWIERNICZE)*
- *STRATEGIE INWESTYCYJNE - ANALIZA TECHNICZNA I FUNDAMENTALNA*
- *ANALIZATOR GIEŁDOWY, CZYLI JAK KORZYSTAĆ Z KOMPUTERA NA GIEŁDZIE*
- *KIEDY KUPOWAĆ, A KIEDY SPRZEDAWAĆ?*

Kolejny kurs dla rozpoczynających przygodę z Giełdą Papierów Wartościowych w Warszawie!!!
Specjaliści rynku kapitałowego, licencjonowani maklerzy, 2 weekendy z innymi inwestorami!!!
Termin kursu: 21-29.01.1994, Cena: 1,5 mln zł

PODSTAWY BIZNESU

KURS DLA LUDZI PRZEDSIĘBIORCZYCH

(przedsiębiorczość, finanse, marketing, zarządzanie strategiczne małą firmą)
Termin kursu: marzec-maj 1994, Cena: 2,5 mln zł

Informacje i zapisy:
POLSKO-AMERYKAŃSKI INSTYTUT PRZEDSIĘBIORCZOŚCI,
RZESZÓW, ul. Zygmuntowska 2A, tel./fax 328-58, w godz. 9.00 - 15.30

świat finansów to świat ryzyka - naucz się walczyć z ryzykiem ZAPRASZAMY!!!

AGENCJA BADAWCZO KONSULTINGOWA INSTYTUTU

OFERUJE USŁUGI SZKOLENIOWE W ZAKRESIE:

- PRZYGOTOWANIE BIZNES PLANU - WYCENA PRZEDSIĘBIORSTW - ANALIZA FINANSOWA PRZEDSIĘWZIĘĆ INWESTYCYJNYCH (FEASIBILITY STUDY) - PROGRAMY RESTRUKTURYZACYJNE I NAPRAWCZE - REGULACJA STANU PRAWNEGO NIERUCHOMOŚCI - PROWADZENIE POSTĘPOWANIA LIKWIDACYJNEGO I UPADŁOŚCIOWEGO -

G-450022nf

408

Michael Klecheski
Konsul

Szanowny Pan
Krzysztof Kaszuba
Dyrektor
Polish-American Small Business Institute
ul. Zygmuntowska 2A
35-030 Rzeszow

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AMERICAN LIBRARY

The American Library in Kraków
cordially invites you to a lecture

CAPITAL FORMATION IN THE US - OR HOW ORDINARY AMERICANS BECOME WEALTHY

by

PROF. CHARLES R. B. STOWE
Sam Houston State University

The lecture will be held
on Thursday, April 7 at 3:00 p.m.
at the American Library, ul. Stolarska 9

Krakow ul. Stolarska 9, Tel. 21 67 67 Ext.138

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Leżajsk, dnia 16.03.1994r.

Pan Dyrektor
Amerykańskiego Instytutu
Przedsiębiorczości
35-030 Rzeszów
ul. Zygmuntowska 2A

Leżajskie Stowarzyszenie Wspierania Inicjatyw Gospodarczych dziękuje Państwu za wyrażenie pozytywnej opinii dotyczącej powołania Stowarzyszenia i projektu uruchomienia stałego biura - Centrum Szkoleniowo-Doradczego.

Mamy przyjemność poinformować Państwa, że Stowarzyszenie wzięło udział w konkursie organizowanym przez Fundusz Współpracy w Warszawie w ramach Programu Wspierania Rozwoju Małych i Średnich Przedsiębiorstw oraz Rozwoju Sektora Prywatnego. Projekt uruchomienia Centrum Szkoleniowo-Doradczego, przygotowany i zgłoszony do konkursu przez Zarząd Stowarzyszenia otrzymał ocenę dobrą i został przyjęty do realizacji.

Poparcie Państwa jako reprezentantów środowiska lokalnego dla naszej inicjatywy było ważnym argumentem za przyjęciem i oceną pozytywną wniosku przez komisję konkursową.

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ROBERT MORRIS COLLEGE

Dr. Eugene G. Gomolka
Miles Professor of International Management
Director, Miles International Conference
412-262-8398/FAX: 412-262-8586
Internet: gomolka@rmcnet.robert-morris.edu

February 26, 1994

TO: Krzysztof Kaszuba

FROM: Gene Gomolka Gene Gomolka

RE: Central European Assistance Awards Program

Under a Support for East European Democracy initiative, the Association of International Educators has announced a possible program for upper division undergraduate students or graduate students to study in the U.S. for one year. I am attaching a copy of the announcement which they released.

Do you know of a bright, motivated undergraduate or graduate student in your area who has excellent grades and might be interested in studying Business at Robert Morris College in Pittsburgh for a year?

The awards program would pay transportation, housing, meals, etc.; and the College, or a sponsor, would cover tuition.

Please let me know if you can recommend a student. If so, we will have to move quickly, since this student would have to apply, be accepted, and be selected in anticipation of an April deadline.

I hope that things are going well for you and the Rzeszow Small Business Institute.

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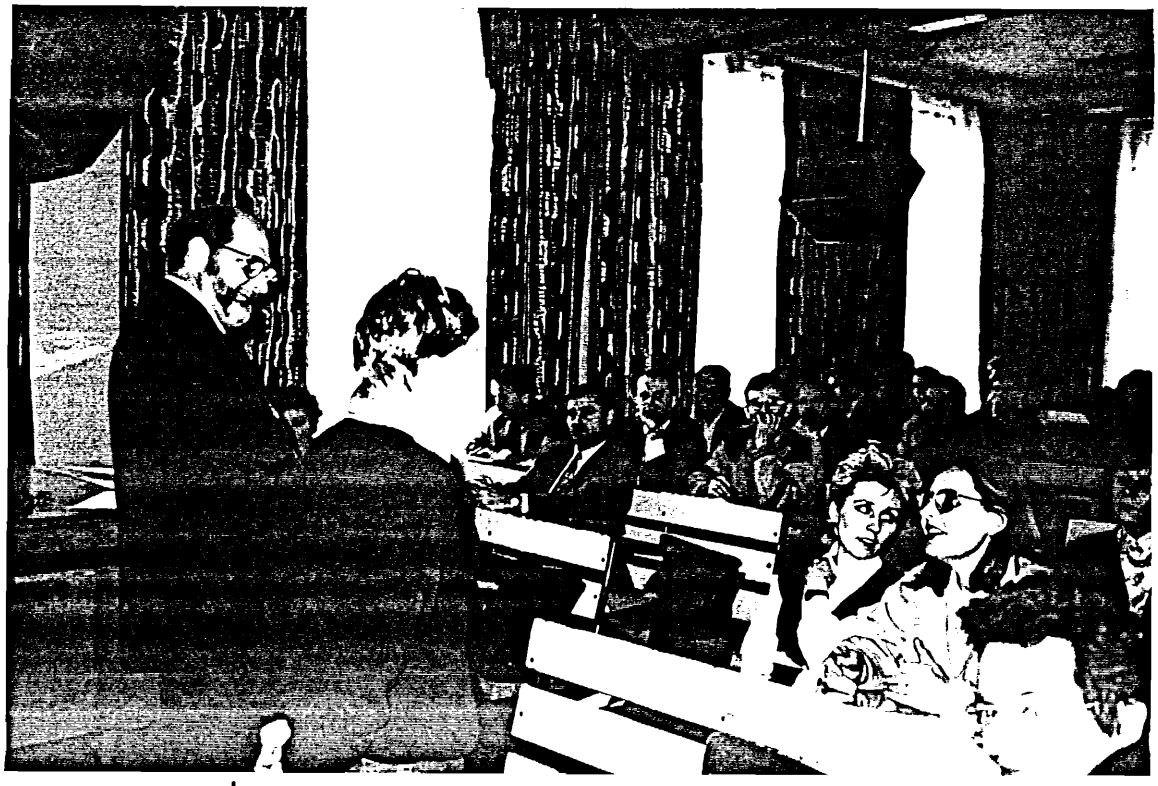
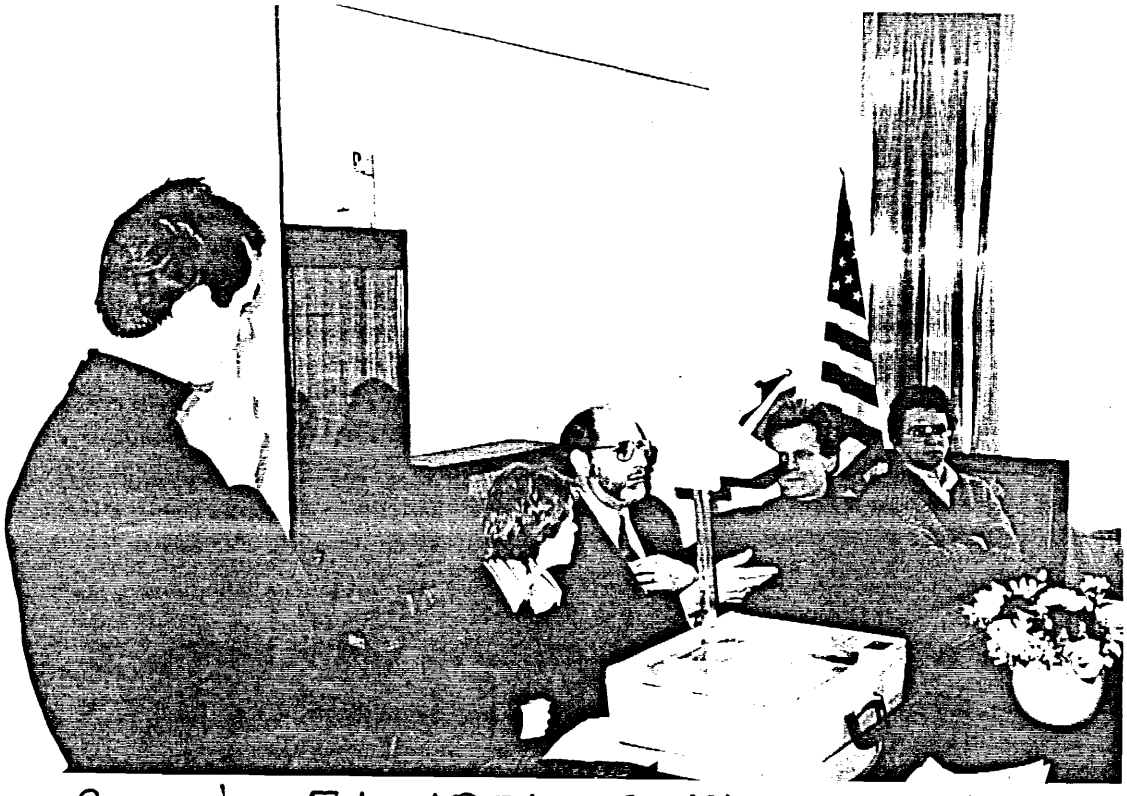


Rzeszów, Feb. 1994 - Selling Seminar



Rzeszów, Feb. 1994 - Selling Seminar

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Dr. Cathy Ashmore, Prof. Wayne Talarzyk
and participants of Retailing Seminar in Rzeszow.

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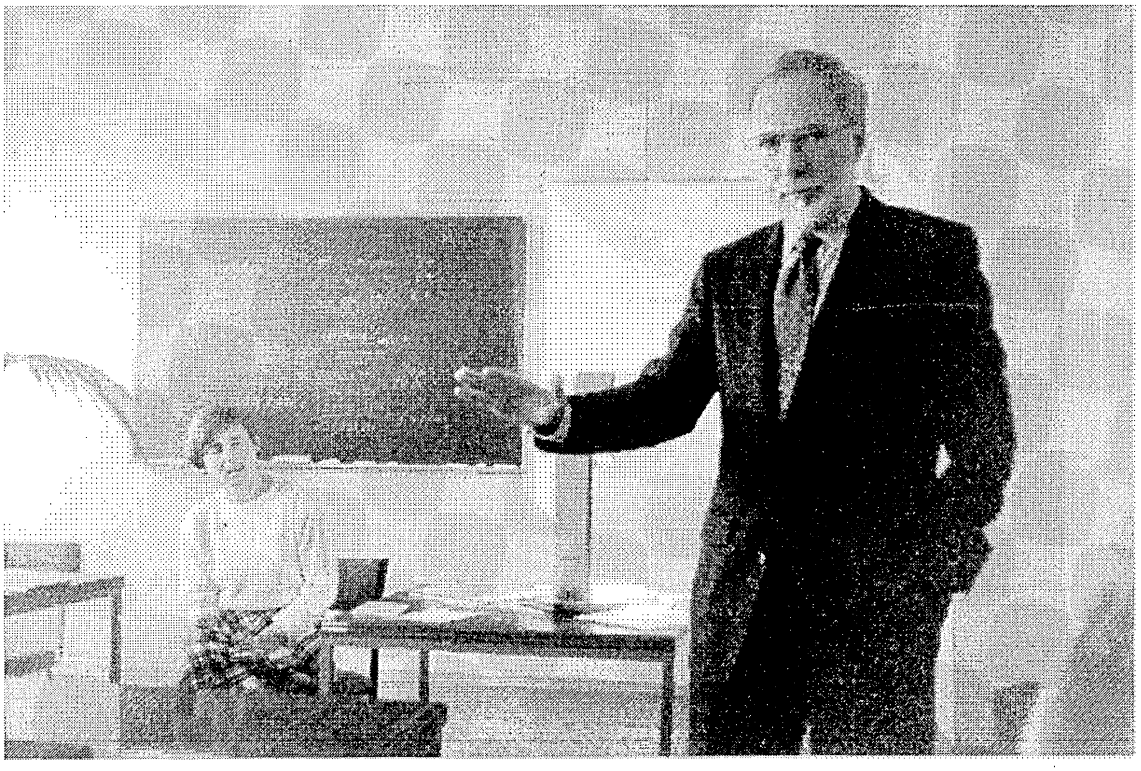
Prof. Wayne Talarzyk presents a new seminar on "Successful Retailing" to the Polish faculty.



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Bialystok

APPENDIX

5.0

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MAINTAIN
TASK
FORCE

ECONOMIC FOUNDATION.
NSZZ SOLIDARNOŚĆ

80-855 GDAŃSK
ul. Wały Piastowskie 24
POLAND

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

AGENDA FOR THE TASK FORCE MEETING
ENTREPRENEURSHIP INSTITUTES IN POLAND PROJECT

Hotel *Europejski*, Warszawa, February 10, 1994
11:30 a.m. - 3:00 p.m.

1. Welcome

2. Introduction - short overview of the Entrepreneurship Institutes in Poland Project year 1994

   * Institutes activities
   * Faculty Workshops
   * New Seminars
   * National Conference May 15-17, 1994
   * Each Institute proposals concerning the future prospects of the Project

3. The role of the Advisory Committee during the third year of the Project realization

   * Proposals of Members of the Advisory Committee
   * Importance of networking and coordination SB promotion

4. Presentations and suggestions of AC Members

A LIST OF PARTICIPANTS - TASK FORCE MEETING
February, 1994

1. Mieczyslaw Bąk
   Krajowa Izba Gospodarcza (National Economic Council)
   Trębacka 4 str.
   00-740 Warsaw
   phone#: 27-47-58

2. Krystyna Gurbiel/Jacek Janczewski
   Fundusz Współpracy (Cooperation Fund)
   Żurawia 4a str.
   00-503 Warsaw
   phone: 5868/5825

3. Jerzy Iwicki
   Ministerstwo Przemyslu i Handlu (Ministry of Trade and Industry)
   Department Małych i Średnich Przedsiębiorstw (Department of Small and Medium - Sized Enterprises
   Wspólna 4 str.
   00-513 Warsaw
   phone#: 21-18-20 fax#: 628-36-42

4. Wojciech Kempisty
   Fundusz Współpracy - Biuro Koordynacji Ksztalcenia Kadr
   (Cooperation Fund - Bureau of Coordination & Staff Training)
   Koszykowa 79 str.
   Warsaw
   phone#: 625-28-61/625-39-37

5. Marek Kozak
   Polska Agencja Rozwoju Regionalnego (Agency for Regional Development)
   (Biuro ds. Pomocy Zagranicznej - Urząd Rady Ministrów)
   Żurawia 4a str.
   00-503 Warsaw

6. Patric La Combe
   Labor Attache
   American Embassy
   Aleje Ujazdowskie 29/31
   00-902 Warsaw

7. Donald Presley
Ms Nina Majer
US Agency for International Development
Ambasada Amerykańska
Al. Ujazdowskie 29/31
00-902 Warsaw

8. Jolanta Tanaś
Departament Promocji Przedsiebiorczości (Department of Entrepreneurship Promotion - Ministry of Industry)
Departament Małych i Średnich Przedsiębiorstw
Wspólna 4 str.
00-921 Warsaw
phone#: 528-38-31

9. Zofia Wyderkowska
Ministerstwo Edukacji Narodowej (Ministry of Education)
Al. 1 Armii Wojska Polskiego 25
00-918 Warsaw
phone#: 29-19-33 ext. 882

10. Ewa Banachowicz
Polsko-Amerykańska Fundacja Doradztwa dla Małej Przedsiębiorczości (Polish-American Advisory Foundation for Small Entrepreneurship)
Emilii Plater str.
00-118 Warsaw
phone#: 24-26-06 fax#: 20-99-74

11. Mieczysław Pyzel
Urząd Pracy (Labor Department)
Departament Pośrednictwa Pracy
Tamka 1 str.
00-349 Warsaw
phone#: 26-70-61 ext. 147 fax#: 263565

12. Alexandra Duda
Ministerstwo Promocji Przedsiębiorczości
Al. Ujazdowskie 1/3
00-583 Warsaw

13. Adam Gałczyński, Ph.D.
Advisor to Minister Office of the Council of Ministers
Cabinet of the Minister of Small Business Promotion
Al. Ujazdowskie 1/3
00-583 Warsaw
phone#: 694-7108 Fax#: 400-604

14. Zbigniew Kowalski
Technical-Agriculture Academy
Katedra Ekonomiki Rolniczej i Informatyki
S. Kaliskiego 7
85-791 Bydgoszcz

15. Grażyna Kopińska
Fundacja Rozwoju Demokracji Lokalnej (Fundation for Local Democracy)
Krzywickiego 9 str.
02-078 Warsaw

16. Andrzej Kisielewicz/Stanisław Mendys
Departament Promocji
Ministerstwo Współpracy z Zagranicą (Ministry of Cooperation with other countries)
Pl. Trzech Krzyży 5 W-wa

17. Ms Kayoko Gotoh, Program Officer
United Nations Development Program
Przedstawicielstwo Narodów Zjednoczonych ds. Rozwoju Gospodarczego
Al. Niepodległości 186 00-608 W-wa
PO BOX 1 W-wa 2
tel. 250-317 Fax: 254-958

18. Mr George L. Metcalfe,
Poland Small Business Gemini Project
Ministerstwo Przemysłu i Handlu
ul. Wspólan 4, r.# 4035, W-wa

19. Mr Ronald A. Dwight
c/o American Study Center IRIS
Warsaw University
Ksawerów 13
02-656 Warsaw

20. Piotr Kowalski
vice-President
Korporacja Finansowania Przedsiębiorczości
(Polish-American Enterprise Fund)
Towarowa 25 str.
00-869 Warsaw
phone#: 321-332; Fax#: 327-542

21. Bogdan Piasecki, Prof./ Anna Rogut
Łódz University,
Rewolucji 1905 str. room #41
90-214 Łódź
phone#: 333 944 fax#: 364-148

Task force meeting in Warsaw.

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APPENDIX 6.0

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POLISH SCHOLARS VISIT U.S.

APPENDIX 7.0

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DEVELOP CASE STUDIES OF POLISH ENTREPRENEURS

Case Study 1

Zbigniew Urbanski
Jaroslaw Majewski
BIG Ltd
Klasztorna str.13
61-779 Poznan

Established: 1992
Employees: 7
Type of activity: design, graphics and preparing of different types of printed materials, forms, promotion materials, other minor printing services.

Establishing of a company:

Competition, especially created by imported consumer goods, along with increasing clients' requirements concerning quality of purchased products, caused together rapid increase of demand on the entrepreneurs part for promotion materials and attractive wrappings for their products. It stimulated a quick growth of the number of firms offering various printing services. BIG was one of such firms.

First problems:

A rapid increase in the number of companies providing such services resulted in substantial increase of competition. One way to overcome others is continuous improvement of equipment--computer hardware and software useful in the whole printing process.

BIG is a small company and its owners--due to the short time of operating--did not manage to gather funds sufficient to finance the development. Since they decide, however, to continue their work, it became indispensable to find resources allowing company growth.

Looking for a Chance:

Partners decided that there are three possibilities to get needed resources. The first was to find an investing party willing to locate its money in this company. The second solution consisted in getting a credit from a bank. Both partners decided that those ways even though solving the problem could create new ones. A new partner could have a negative influence on a company harmonious work. On the other hand, high costs of a credit could cause--in case of decreasing market--financial problems in the company.

The third solution was to use offer of the Governmental Fund for Disabled Rehabilitation. This Fund allowed to obtain investment resources for creation of new or adapting already existing work places. It meant employing disabled people.

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Exploring this possibility allowed, besides investing in the company growth, improving ways of providing services. Newly hired employees were given positions at administration and accounting departments of the company--earlier this job was done by the owners. Thanks to that the owners could spend more time searching for orders and processing them. Together with updated equipment this created an opportunity to expand a company offer and improving the quality of company products without increasing costs of company operations, as it would be the case with bank loan.

Competition:

Technology of printing process in a printing house is composed of three elements. The first phase is to develop a graphic design and then special matrix is required in the second phase--printing. The third phase goes to bookbinding, where printed elements are cut according to required size, glued and sewed together, etc.

Majority of such companies which recently emerged at the market performed only the first phase, the remaining were given to subcontractors. It is caused by the fact that the second and third phase require more expensive equipment, while the price for their produce is lower--in case of some orders they are not required at all.

Such situation results in two phenomena. One of them is the fact that firms get highly specialized in a chosen phase of the printing process. The second is appearance of bottle necks in orders processing due to periodical increase of orders receipt. For instance, during International Poznan Fairs. The result is that companies do not meet time requirements. Because the competition is great, failure to meet time limits often results in losing a client--even if the company was not the only one to blame.

To Overcome Competition:

BIG specializes in the first phase of the technology process. It is a small firm and usually takes relatively small orders. It does not priorities any order with relation to printing--a weak point in orders processing.

The owners of the company while looking for solutions to this problem concluded that their chance is to join some printing house. Such common venture would give both parties certain advantages like lowering costs of company operations, increasing possibility of meeting all client's requirements, flexibility in negotiating profit margin with the client, etc.

Such venture increases the risk hidden in the higher number of decision makers, possibility of losing some of the clients (due to BIG competition), difference in incomes depending on discrepancies of profitability of technology phases, etc. However, according to the BIG owners, advantages are greater than risks connected with such move.

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QUESTIONS:

1. What phenomenon led to poligraphy sector development?
2. Define BIG problems. What did they consist in?
3. What was the opportunity that partners used?
4. Is the solution to the existing company problem final?
5. Try to present specifics of poligraphy branch plus try to find other directions for BIG development which can be implemented by BIG partners.

Prepared by Lukasz PAWELCZAK

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Case Study 2

Cooperative Bank in Buk
Przykop str.4
64-320 Buk

Employment: 30 persons
Type of activity: banking and financial services

Is a Cooperative Bank a Private Firm?

It is difficult and simple to answer this question at the same time. On one hand, any cooperative, including a bank, belongs to its shareholders: natural persons and subjects, like in a company. On the other hand, however, it differs from the company with respect to objectives of the carried activities (it is not only profit oriented), and to the form of decision making by owners.

Not to dwell too much on this question, one can say that cooperatives of different type (labour, involved in food processing, banks) got their chance to function according to original assumptions at the same time as private firms. It was the moment of economic changes and introducing market economy laws. It refers also to cooperative owners, who at the same time faced an opportunity to be able to really influence cooperative operations.

External Conditions:

In the period of 1989-1992 a banking system was reformed. Those reforms led to increase of banks independence and to increase of competition in the field of finance services. It was especially true of big cities--the most attractive markets from banks perspective.

New phenomena appeared, influencing banks operations. Firstly, growing inflation stimulated profitability of their work. At the same time inflation caused the face that many loan applicants could not pay back their debts. This was the reason for limiting loans offer and fluency of financial operations.

These phenomena influenced Cooperative Bank in Buk. A difficult situation was even worse due to growing unemployment and lower level of economic activities in the region. These, specific to small towns, circumstances limited the number of the bank clients.

At the same time, the bank introduced computer networks into performing operations, limiting number of employees.

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A Hard Nut to Crack:

Bank authorities faced complicated problem. On one hand, to increase profitability of its operations and get return on investments, bank had to cut its costs. It meant firing many employees, who were to become jobless in a market where job offers were scarce. Moreover, bank had to undertake some actions to find new clients in a region where recession was at work.

Escape to the Future

Searching for possible solutions to existing problems, bank authorities decided to spend some more and open a few affiliate in Poznan (30 km distance from Buk) -- the most attractive place for offering banking services in the region.

This decision solved many problems of the bank at one time. Employees threatened by unemployment got a chance to work in a new affiliate, in exchange for troublesome commuting. Appearance with an offer at a market with different characteristics increased chances for reaching new clients.

However, what was a chance, was also a risk. First of all, the competition and clients expectations at a new market were much higher. To answer that, the bank had to include new elements in its offer, upgrade bank officers qualifications and thus expose them to continuous training.

Unexpectedly, a good tool in fighting competition was the fact that lower salaries of commuting employees allowed for lowering costs. Services were offered at a better price for customers. Salaries in Poznan were higher due to low unemployment rate.

Feedback:

Expanding an offer and upgrading staff skills gave good effects when presented at local market. New products, more interesting for clients, allowed for getting a good position at a local market. Old clients came back to our bank.

In the end, those effects thanks to brave decisions of bank owners helped to solve problems being results of economic transformations. They gave way to the future growth.

QUESTIONS

1. Try to define which macroeconomic factors influenced the situation of a cooperative bank in Buk, and which influence yours?

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2. Present a scenario of a bank situation if the decisions would have been more pro keeping status quo?

3. Which of 4P of marketing mix were implemented in the described situation?

4. What the "escape to the future" meant in that situation?

5. What did the feedback consist in? Try to present its next phase.

Prepared by Lukasz Pawelczak

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Case Study 3

Cooperative Bakery Company BAHIA
Zeromski str.13/15
60-544 Poznan

Established: 1953
Employment: 300 persons
Type of activity: chocolate assortments and cakes production

Independence of the Company:

The end of Cooperative Union in 1989 gave BAHIA -- being at this time a production cooperative -- a self-dependence allowing for decision making concerning future development strategies. At the same time, import of food products caused problems with selling of goods produced by this company. This was a new market condition for producers working until that time.

Simultaneously, a competition began among in-country producers from the same branch. Some of them, for instance WEDEL or GOPLANA, had more financial and organization resources to utilize. Still, newly emerging private firms were more flexible in making decisions, did not have the burden of old production equipment and extensive employment.

A Way to Survive:

The change of conditions for carrying on activities forced stating ideas for the company structural changes, so that the company could maintain production and develop despite competition and problems with selling. This situation meant developing new strategy for the company and stating steps for its structural changes.

The first step was improving employment scheme and adjusting number of employees to actual needs of the company, plus changes in organization to improve management of the company. One of this step elements was introducing computers into administrative component, in order to verify relation of the numbers of clerical and production staff.

The next step in the company structural changes was verification of the company offer. This caused diminishing production of goods that did not sell well, and focusing on those which had a fairly good chance to stay on the market because of quality and demand.

The following step was product improvement, especially its wrapping. Two types of activities were undertaken in this respect; first of all, the size of a wrapping of a single

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product was prepared in many options to serve needs of various clients -- wholesalers, intermediaries and retailers. Secondly, the quality of the wrapping was improved, its visual aspect. Wrappings were ordered first abroad, and then, when the quality improved, from Polish producers.

The next step meant expanding the variety of products offered. Since it involved investing in new equipment, the final decision concerning investments was made after market research and deciding what type of products can meet interests of clients. Implementation of new products production finished the process for structure changes in the company.

Now -- Growth:

Outcomes of changes which took place in the company allowed for its survival in increasing in-country and foreign competition, and as a result of that process a new company emerged, not only trying to survive but also looking for ways to grow and expand. Optimal use of its potential and strong position at the market are now the present goals of the company.

Due to all these reasons, after adjusting company performance to market requirements and creating a new offer, an advertising campaign began. The promotion focused not on the name of the company but on its individual products (they already had their own names -- HIT, ZOO, MARKIZA, BRAWO, etc) -- they were representative of the company already. The campaign was designed to reach chosen clients. The reason for such structured advertising was to improve relation between expenditures for ads and their results.

Quitting promotion at TV national broadcasts in favor of local ones was one of the results of such policy. Experts said that the company clients were local rather than national. National promotion, more costly, would not increase sales adequately to those expenditures.

Current development strategy of BAHIA is connected with searching new markets, also foreign, which would justify further development of the company potential and would also allow its full use.

QUESTIONS

1. What was the reason for BAHIA success -- bright idea or being consistent?

2. Present the order of steps in structure changes of the company. What did they consist in?

3. Evaluate rationale of the company management activities. Try to present the order of changes steps, justify changes.

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4. Was the decision about promotion strategy justified? Look for pro arguments. Describe situation when it would be improper.

5. What was the stimulus for BAHIA activity? (choosing the best option)

Prepared by Lukasz Pawelczak

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Case Study 4

Jaroslaw Kociecki
Accounting Office TAXPOL Ltd
23 Lutego Str. 7/6
61-471 Poznan

Established: 1992
Type of activity: accounting services for natural persons and subjects

Currently operating TAXPOL company was originally established as "Jawa" in 1988 as a trade and production company. In 1992 their owners decided to sell this firm due to decreasing profitability and strong competition. The company was bought by Kazimiera Kowalska and Jaroslaw Kociecki. The latter became the sole owner of it in September 1992.

Decision:

K. Kowalska and J. Kociecki, students at Poznan Academy of Economics, were looking for ways to earn money to be able to continue studying. The fact that they would work only part time and thus earn little, was a decisive factor in becoming business owners.

Choosing the Product:

There were several reasons why this type of activity was chosen. The first one was would be businessmen interests and knowledge. At the Academy they specialized in financial issues. Moreover, continued education required non set working hours. Plus, they had to find a product which would allow them to be competitive on the market without investing.

Due to all that they decided to offer their services as financial consultants, answering all requirements. In order not to limit the group of potential clients, they decided not to define the field of the company activity too closely.

To Start Up with no Expenses:

While searching for the most economic way to start, they found out that the situation in retail trade was changing. Decreasing profitability was the reason for many firms closing their doors, even those which had been operating for a couple of years. Consequently, they decided to look for such a company, which would allow return on investments (registration

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costs) in a long term run, and for which an alternative solution except sale would be closing at all. "Jawa" Ltd turned up to be such a firm.

To Operate with Minimum Expenses:

The beginning with limited resources and a characteristics of the company activity forced owners to minimize costs. In service sector cutting salaries creates such an opportunity.

Diagram 1. Employment in TAXPOL in 1992-1994

	Years		
Form of Employment	1992	1993	1994
Permanent Contract	1	1-2	2
One Time Job Contract	1-5	1-3	2

To reduce costs of salaries only two persons had permanent work contracts during the whole period of a company operation. Still, all that time 2 to 6 persons worked for the company, depending on a number of orders.

This strategy enabled owners to offer their services at lower price to the clients with the same profit margin--an important factor in searching for new clients and competing with already existing firms.

The Company and the Market:

Graduating the Academy, full engagement in the company management and over two years of work gave the owner an orientation in market characteristics and allowed for its analysis and developing growth strategy.

TAXPOL clients were natural persons and subjects--only private. There are more clients from the first group, but the turnover from both is similar. There is a certain regularity: more clients turn up at the beginning of the year--since new tax system was introduced--and then their number decreases in the year course.

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Diagram 2. Dynamics of TAXPOL Turnover (1st quarter of 1992 = 100)

Years	1992				1993				1994
Quarters	I	II	III	IV	I	II	III	IV	I
Turnover	100	214	672	828	691	847	918	941	1622

For the growth strategy of the firm it is important to notice the division of subjects operating on the market into those acting within law limits--part of them are already TAXPOL clients. The second group constitute those who belong to the so called "grey sphere" in the economy--they are subjects avoiding tax offices, and if they have to pay tax--they close.

According to Kociecki, there will be less and less possibilities to avoid tax payments and law regulations. The number of firms (his clients) forced to use professional accountants and consultants will thus grow.

Due to that, Kociecki expects his company to specialize in serving subjects, that is small and medium enterprises, and giving up natural persons. He intends to expand his offer and give his clients a complex pack of services, like financial services, bookkeeping, tax advising, preparing business plans, and credit applications.

QUESTIONS

1. Present steps of TAXPOL development.

2. What circumstances (and with what purpose) were utilized while company establishing phase?

3. Indicate factors influencing company operations and separate administrative from market ones.

4. What the growth strategy prepared by the owner consisted in?

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EAST TRADE & IMPORT EXPORT

Owner Piotr Zakowicz

EAST TRADE IMPORT & EXPORT imports household goods from the countries of the former Soviet Union and Western Europe. These goods are distributed on the Polish market through dealers and are sold in three thousand stores all over Poland.

The second part of firm's activity is the export of such goods as: paints, coppery fixtures, sheet aluminum, sheet steel, and export Polish technical ideas. The firm has just started to take the first steps in restructurization, modernization and managing of the companies in the countries of the former Soviet Union. Forty people are employed at the main office at Hurtowa Street nr 4.

The owner of the EAST TRADE IMPORT & EXPORT firm started his activity in different branches. First, Zakowicz started a business of imported components for computers. Lithuania and Vilnius were chosen for the localization of the firm because of its provisional, informal, but very liberal law. Pierestrojka and transformation process provided the opportunity to develop private entrepreneurship.

When they changed the activity the knowledge of eastern products and their confidence being the result of their previous cooperation were very helpful. At the time the new business was started it was very difficult to acquire household goods. This lack of supply combined with a high demand influenced ETI&E to choose this market.

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One of the first problems the firm had to face was a banking system unprepared to serve so many new established businesses in foreign exchange. Transferred money was lost for a long period of time without finding its destination. There was a need to adopt to new legal tender — cash flow. Half year cooperation with many banks over the world gave expected results but it cost the firm 100.000 $ lost. This money has never reached an addressee.

Having no expert in book-keeping and law was another important problem that firm had to struggle with. New economic reality surprised even good book-keepers and lawyers. At that time it was very hard to select good qualified staff. Mistakes seemed unavoidable, and some fines were levied.

Initially, the firm also had some other difficulties such as housing (today they work in a beautiful skyscraper with rooms for storage), telecommunication (today they have 8 city lines and central for 80 extension numbers.

Part of the problem was that there were no distribution channels. Each dealer creates their own network; and through them reach thousands of stores all over the country. Another difficulty was service. Searching experts, training them and creating with them new technological process of serving the market (to provide services with spare parts, collection of used parts, evidence of repairs for computer analyse of market.

The clients, and prospective clients of this firm, are young, married and bought appliances twenty years ago and now want, and need to upgrade them. These two groups of clients include people who get average wages. They are firm's biggest market segmentation.

One of the ways of communicating with clients is to gather opinion and comments

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from them about the implements. Another method is to enclose a guarantee bonus coupon which is returned by mail to the firm and is entered into a drawing for valuable rewards. The clients very often enclose their opinions about the implements.

The biggest success of firm is that it represents the products of such firms as Snaige, Saratov, Wiatka, Aqua Vac. This gives the firm very strong position in the market. Today many firms which enjoys a good reputation compete for cooperation with this firm. The competition in this branch is very strong. They are the biggest concerns in the world and in a very good style achieved Polish market. These companies offer Polish clients the variety of products and won them.

In order to raise the standard of efficiency, some changes are required in this firm. There is a need to establish computer connection with main a data base of banks serving the firm and to establish satellite telephone connection. Another need is a helicopter to contact dealers and contrahents all over the country, and a jet for international contracts (especially for eastern market).

The owner of this firm would like to exist on a market as well as a producer. He desires to establish a foundation which would support education, medical services, culture and sport.

Questions for discussion:

1. Do settlement of barter accounts compete with settlement of cash accounts?
2. Do the goods produced in the countries of the former Soviet Union will the purchaser in other European countries during next 10-15 years?
3. The products of which branches of Polish industry can find purchaser in the countries of former Soviet Union?

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"MADORIN, IMPORT-EKSPORT" FIRM

This company owns two retailing stores "Bogart" and "Contessa" and "Power club". In the stores are being sold high quality clothes and cosmetics, in "Power club" you can improve your physical condition by doing various exercises. Very good equipment and nice service make firm's clients happy.

The owners are three young engineers. Working now as the engineers they wouldn't earn enough money and therefore they started this kind of activity. It's more profitable. This is their first enterprise.

At the very beginning the firm was involved in Import and Export of goods. Now it's limited. They were supplying Eastern markets but it wasn't so much profitable and very risky. The most stable market for them is Polish market.

Generally while running a firm, they have lots of problems but they don't need special solutions. The problems that they have to struggle with concern the changing all the time regulations and bureaucracy. Another barrier is cash flow which is too slow to new economic conditions and bad banking system. The banks don't cooperate together too well.

The success for them means the stabilization in business. In their opinion to be a successful businessman you should choose right segment of the market and work hard. Your personal skills--knowledge, scrupulosity, industry also impact on final result.

The clients of their firm are citizens of Bialystok who do shopping in their stores and attend "Power club". They don't have personal contact with them, the intermediaries between them are the managers.

The prices in the store are suitable to the financial possibilities of the middle class. Because a market is very competitive they have to watch competition all the time.

They desire to develop activity by opening new stores. To accomplish this they need help of local government. The case of renting rooms needs to be solved. They also need current information about the situation on the market and in economy and anticipation of inflation.

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DYWERSYFIKOWAC DZIAŁALNOSC CZY NIE ?

W roku 1988,kiedy w Polsce wydawano jeszcze pozwolenia na działalnoś gospodarczą dwaj bracia Grzegorz i Krzysztof K. oraz ich dobry koleg Janusz P. założyli spółkę z o.o. o nazwie Polcom. Spółka została założona z myślą o pojedynczym biznesie,w związku z czym nie przywią zywano większej wagi do umowy spółki i podziału ról między udziałow- cami.Krzysztof K. i Janusz P.byli dyrektorami w poważnych firmach produkcyjnych odpowiednio w branży kosmetycznej i spożywczej.Tworzon spółkę zamierzali traktować jako asekurację na wypadek niepowodzeń w swoich macierzystych firmach.Dla Grzegorza K.,pracownika naukowego uczelni tworzona firma stanowiła szansę z jednej strony uzupełnienia skromnego budżetu rodzinnego,zaś z drugiej strony szansę weryfikacji nauczanej przez niego teorii dotyczącej działania w warunkach gospo- darki rynkowej.Grzegorza K. zgodnie wybrano Prezesem Zarządu Polcomu Pierwszym pomysłem,który stanowił przyczynę założenia firmy był eks- port suszu z wytłoków jabłkowych do RFN.Właściciele firmy wykorzysta li wówczas niegospodarność jednego z przedsiębiorstw państwowych,któ re płaciło wysokie kary za zanieczyszczanie środowiska poprzez wyrzu canie wytłoków jabłkowych(odpad z produkcji soku jabłkowego) w nieod powiednich miejscach.Przedsięwzięcie zakończyło się powodzeniem, a udziałowcy zdecydowali się na przeznaczenie uzyskanego zysku na re lizację kolejnych pomysłów.Tymi kolejnymi pomysłami były:zagospodaro wanie stłuczki szklanej(odpady z produkcji) i pośrednictwo w zakres handlu zapasami magazynowymi.Realizacja powyższych pomysłów stanowi jedynie okres przejściowy w poszukiwaniu przez spółkę właściwego ki runku działania.W połowie 1989 roku udziałowcy zdecydowali się,że Polcom podejmie próbę zaistnienia w branży przetwórstwa owoców i wa rzyw.Wykorzystano do tego celu doświadczenia Janusza P.W oparciu

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o technologię przygotowaną przez jedną z jego pracownic, w kooperacj z jedną ze spółdzielni przetwórstwa owoców i warzyw rozpoczęto produkcję ketchupu. Grzegorz K. zajmował się przez kilka miesięcy zarówno organizacją produkcji, jak i jej sprzedażą. Robił to z dużym powodzeniem dzięki czemu potwierdziła się słuszność wyboru kierunku działania. W połowie 1990 roku, kiedy ketchup Polcomu był już znany na rynku Polski Płd.-Wsch. Janusz P. i technolog Krystyna L. zdecydo li się na opuszczenie swojej macierzystej firmy i podjęcie w Polcom pracy na pełny etat. Począwszy od tego momentu rozwój Polcomu został przyspieszony z wyraźnie określonym profilem działania. Zatrudniono wówczas na pełny etat główną księgową i pracownicę działu sprzedaży Dzięki powyższym ruchom kadrowym działalność stawała się coraz bardziej uporządkowana. Był to jednak ciągle okres spontanicznych dział Grzegorz K., Janusz P. nie podzielili między sobą odpowiedzialności, większość decyzji podejmowali wspólnie, a w niektórych sytuacjach du blowali działania. Pomimo tego w okresie od sierpnia 1990 roku do cz wca 1991 roku rozwój firmy był bardzo znaczący. Zadecydowały o tym głównie: wzrost sprzedaży na rynku krajowym i udane kontrakty barter ze Słowacją. W firmie zaczęły pojawiać się jednak problemy. Wyczuwało się bowiem różnice w stylu zarządzania pomiędzy Grzegorzem K. i Jan szem P. Pierwszy z nich był zwolennikiem takiego systemu zarządzani w którym wszyscy pracownicy mają poczucie uczestnictwa w podejmowar decyzjach a system wynagradzania mocno wiąże płace z wynikiem finar wym firmy. Drugi przeniósł natomiast system, który najprawdopodobniej realizował w swojej poprzedniej firmie, czyli system, w którym pracov nicy odczuwają dystans do szefa i często boją się głośno wyrazić swoje opinie o działaniu firmy. W tym momencie Grzegorz K. wyczuł, że obydwa podejścia tak bardzo różnią się od siebie, że jeden z liderów musi się odsunąć, aby zostawić pole do działania drugiemu. Taką też podjął decyzję pozostawiając pole Januszowi P. w sytuacji, gdy dział sprzedaży wywalczył dla produktów Polcomu znaczącą pozycję na rynku Polski Płd.-Wsch. Sam podjął natomiast próbę stworzenia w ramach Polcomu działu komputerowego, który specjalizowałby się w komputeryzacji banków. Dział ten rozwijany był we współpracy z jedną z firm warszawskich. Polcom znalazł się w nowej sytuacji organizacyjnej. Dział komputerowy, który bardzo szybko rozwijał się był zarządzany

w zupełnie innym stylu niż dział spożywczy. Stworzono bowiem taki motywacyjny, w którym pracownicy mieli poczucie odbioru zapłaty za wykonanie zadania. Tworzony zespół był zespołem typu "self directed". Zaczęły się jednak pojawiać problemy związane z zarządzaniem finansami. Dział spożywczy był bowiem działem, w którym małym firmom jest niezwykle trudno utrzymywać płynność finansową. W dziale komputerowym natomiast płynność tę było było bardzo łatwo utrzymywać. Kolejnym problemem stawał się system wynagrodzeń. Płace w dziale spożywczym były bowiem kilkakrotnie niższe niż w dziale komputerowym chociaż pracownikom działu spożywczego nie można było zarzucić braku zaangażowania. W tej sytuacji Grzegorz K. zdecydował się na oficjalne rozdzielenie obydwu działów i stworzenie niezależnego oddziału firmy warszawskiej, z którą Polcom współpracował. W tym samym okresie Krzysztof K. zdecydował się sprzedać swoje udziały pozostałym wspólnikom. W ten sposób Grzegorz K. i Janusz P. zostali jedynymi udziałowcami firmy. Decyzja dotycząca działów stała się kością niezgody pomiędzy Grzegorzem K. i Januszem P. Ten ostatni widząc bowiem, że Grzegorz K. w coraz mniejszym stopniu angażuje się w sprawy sprzedaży w dziale spożywczym poczuł się samowystarczalny w tym zakresie. Podjął więc działania w kierunku całkowitego rozdzielenia interesów. Zaproponował Grzegorzowi K. wykup posiadanych przez niego udziałów. Grzegorz K. przyjął propozycję i zainteresowani rozpoczęli negocjacje odnośnie ceny tych udziałów.

•• Przedstawiony wyżej przykład oparty jest na faktach autentycznych. Zmieniono jedynie nazwę firmy i imiona i nazwiska występujących w nim osób.

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(Polish version)

P Y T A N I A

Przeczytaj uważnie przykład i odpowiedz na następujące pytania:

1. Czy udziałowcy Polcomu podeszli profesjonalnie do tworzonej przez siebie spółki? Jeżeli nie, to jakie błędy popełnili?

2. Jakie błędy organizacyjne popełnili Grzegorz K. i Janusz P, gdy w 1990 roku podjęli próbę profesjonalnego działania w kierunku rozwoju działu spożywczego?

3. Jak zachowałbyś się na miejscu Grzegorza K, gdybyś podejmował próbę rozwinięcia nowej działalności bez jakiejkolwiek pomoze strony pozostałych udziałowców?

4. Czy w ramach Polcomu można było prowadzić obydwie działalności bez konfliktów między działami? Jeżeli tak, to jakbyś to zorganizował?

5. Jak zachowałbyś się na miejscu Grzegorza K., gdybyś prowadził negocjacje dotyczące sprzedaży jego udziałów w firmie Polcom?

6. Jakie stanowisko odnośnie ceny przyjąłbyś na miejscu Janusza P przy wykupie udziałów? (firma ma niski kapitał zakładowy, zaś wysoki obrotowy).

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Czy "leasing" oznacza sukces?

W 1991 roku Andrzej P. i Roman K. założyli Spółkę Cywiną VICTORIA, której celem była sprzedaż produkowanych we własnym zakresie lodów. Andrzej P. był technologiem i specjalistą w zakresie produkcji lodów.
W latach osiemdziesiątych produkował lody na małą skalę (40 tys. miasto) przy pomocy prymitywnych urządzeń. Roman K. był z kolei osobą bardzo wirygodną dla środowiska. Uważano również powszechnie, że jest on dobrym, doświadczonym organizatorem.
Właściciele VICTORII zdecydowali się na stworzenie firmy nowoczesnej, o dużej skali sprzedaży, a co z tym się wiąże o dużej skali produkcji. Podjęli więc decyzję o wyposażeniu swojej firmy w kompletną, bardzo nowoczesną linię do produkcji i pakowania lodów produkowaną we Włoszech. Ponieważ wspólnicy nie dysponowali środkami finansowymi pozwalającymi na sfinansowanie inwestycji, zdecydowali się na podpisanie umowy najmu z firmą włoską finansującą tego typu transakcje.
W umowie zawarta była opcja umożliwiająca firmie VICTORIA wykup wynajętej linii po zapłaceniu przedostatniej raty wynikającej z umowy.

Treść zawartej umowy dołączono do przykładu.

Umowę podpisano w styczniu 1992 roku. Zgodnie z umową VICTORIA była zobowiązana do zapłąty pierwszej raty w wysokości ok. 65 tys. DM w ciągu 30 dni od daty podpisania.
Właściciele VICTORII w celu sfinansowania przedsięwzięcia zaciągnęli kredyty w DM w polskich bankach mając świadomość ryzyka zmiany kursu DM w stosunku do złotego. Kredyty te były możliwe dzięki przedstawieniu wiarygodnego biznes planu. Plan ten dotyczył już sezonu letniego w 1992 roku.
Zgodnie z umową linia produkcyjna miała być dostarczona w ciągu 8-10 tygodni od daty wejścia w życie umowy, czyli w kwietniu 1991 roku. Tymczasem dostawa nastąpiła dopiero po sezonie, czyli we wrześniu 1991 roku.
Wydawało się, że właściciele VICTORII nie tracili czasu. Okres oczekiwania na maszyny wykorzystali na tworzenie regionalnej sieci dystrybucji. Okazało się jednak, że obsługa zadłużenia związanego z pierwszą ratą jest tak kosztowna, że zmuszeni zostali do dalszego zadłużenia się. Całą nadzieję na opanowanie sytuacji stanowił sezon letni w 1993 roku. Niestety i w tym przypadku nie udało się powstrzymać spirali wzrostu zadłużenia. Wzrost kursu DM i niesprzyjające warunki pogodowe sprawiły, że firma całkowicie utraciła zdolność spłaty kredytu (zyski wynikające z bieżącej działalności okazały się niewystarczające na obsługę zadłużenia).

•• Przedstawiony wyżej przykład oparty jest na faktach . Zmieniono jedynie nazwę firmy i imiona i nazwiska występujących w nim osób

P Y T A N I A

Przeanalizuj fakty zawarte w przedstawionym wyżej opisie oraz przeczytaj uważnie treść umowy pomiędzy firmami VICTORIA i ROMA. W oparciu o swoje przemyślenia odpowiedz na następujące pytania:

1. Czy decyzja właścicieli VICTORII o podjęciu produkcji lodów na szeroką skalę była twoim zdaniem uzasadniona?
   Czym ta decyzja powinna być poprzedzona?

2. Czy wynajem urządzeń był w tym przypadku jedynym rozwiązaniem? Jakie zalety miało tego typu podejście, a jakie zagrożenia?

3. Czy umowa podpisana przez właścicieli VICTORII zabezpieczała ich interesy?
   Jeżeli nie, to które artykuły stanowiły zagrożenie dla udziałowców VICTORII?

4. Co zrobiłbyś, gdybyś znalazł się w sytuacji udziałowców VICTORII?

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U M O W A N A J M U Nr 069/92

zawarta pomiędzy:

VICTORIA
Spółka Cywilna

(zwaną w dalszym ciągu VICTORIA) jako najemcą

i

ROMA S.p.A.

(zwaną w dalszym ciągu ROMA) jako wynajemcą

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W dniu 24 stycznia 1992 roku pomiędzy firmą VICTORIA reprezentowaną przez p. Andrzeja P. i Romana K. oraz firmą ROMA S.p.A. reprezentowaną przez p.Gianini A. z drugiej strony została zawarta niniejsza Umowa:

Artykuł 1. PRZEDMIOT UMOWY

ROMA wynajmuje VICTORII w ramach niniejszej Umowy, linię do produkcji lodów, zwaną w dalszym ciągu maszynami, sprecyzowaną dokładnie w Załączniku A), stanowiącym integralną część Umowy, na okres trzech lat w zamian za kwotę wynajmu w łącznej wysokości DEM 502.227,- (skalkulowaną w oparciu o stopę odsetkową CIRR, obowiązującą w dniu zawarcia niniejszej Umowy).

Artykuł 2. NALEŻNOSCI I TERMINY WYNAJMU

Łączna kwota należności, o których mowa w Artykule 1., obejmuje maszyny na bazie CIF - Polska; wydatki związane z opłatami celnymi oraz ewentualnymi podatkami poza Włochami będą obciążały VICTORIĘ.

Wspomniane należności będą spłacane przez VICTORIĘ według następującego harmonogramu:

- pierwsza płatność równa kwocie DEM 65.685,- stanowiąca równowartość 15% wartości dostawy w ciągu 30 dni od daty niniejszej Umowy

- następne płatności, każda w wysokości DEM 72.757,- winny być dokonywane w sposób następujący:
  - druga rata w szóstym miesiącu od daty dostawy,
  - trzecia rata w dwunastym miesiącu od daty dostawy,
  - czwarta rata w osiemnastym miesiącu od daty dostawy,
  - piąta rata w dwudziestym czwartym miesiącu od daty dostawy,
  - szósta rata w trzydziestym miesiącu od daty dostawy,
  - siódma rata w trzydziestym szóstym miesiącu oddaty dostawy.

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Wyżej wymienione kwoty wolne są od wszelkich opłat, podatków, obciążeń i kosztów, obecnych i przyszłych, nałożonych w Polsce i będą reprezentowane przez weksle własne (Promissory Notes).

Artykuł 3. GWARANCJA SPŁATY

VICTORIA zobowiązuje się dla zabezpieczenia regularnych płatości wymienionych wyżej, spowodować w momencie wejścia Umowy w życie wystawienie przez Bank ..... gwarancji na rzecz ROMY w wysokości DEM 436.542,- treść której określa Załącznik B).

Powyższą gwarancją Bank ..... przyjmuje na siebie wszystkie zobowiązania płatnicze wobec ROMY w przypadku gdyby VICTORIA nie byław stanie wywiązać się ze swoich zobowiązań we właściwym czasie.

Artykuł 4. DOSTAWA MASZYN

Przekazanie VICTORII maszyn nastąpi na bazie CIF Polska.

Artykuł 5. TERMIN DOSTAWY

Maszyny zostaną oddane do dyspozycji VICTORII w ciągu 8-10 tygodni od daty wejścia w życie niniejszej Umowy.

Artykuł 6. WYSYŁKA

ROMA dokona wysyłki maszyn do Polski na podstawie instrukcji spedytora wyznaczonego przez producenta.
Deklaracja przejęcia dostawy, o której mowa w Artykule 1. będzie podpisana przez przedstawiciela wskazanego przez VICTORIĘ.

Artykuł 7. ULOKOWANIE MASZYN BĘDĄCYCH PRZEDMIOTEM WYNAJMU

Maszyny będące przedmiotem niniejszej Umowy będą zainstalowane w siedzibie VICTORII Polska i nie będą mogły być przekazane do innej siedziby bez zgody ROMY.

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Artykuł 8. ODPOWIEDZIALNOSC

VICTORIA zwalnia ROMĘ od odpowiedzialności za szkody wyrządzone osobom lub szkody materialne spowodowane przez użytkowanie wynajętych maszyn.

Artykuł 9. DOCHOWANIE GWARANCJI

Najemca potwierdza, że wybór maszyn oraz gwarancja techniczna i technologiczne uzgodnione zostały bezpośrednio z producentem z tego powodu producent gwarantuje, odrębnym pismem, doskonałe funkcjonowanie maszyn, bezpośrednio najemcy; ROMA jest obciążona z każdej i jakiejkolwiek gwarancji o charakterze technicznym, technologicznym lub jakiejkolwiek związanej z funkcjonowaniem maszyn.

Artykuł 10. KONSERWACJA I UŻYTKOWANIE MASZYN

VICTORIA zobowiązuje się utrzymać i użytkować maszyny, będące przedmiotem niniejszej Umowy, zgodnie z instrukcjami dostarczonymi przez producenta, a szczególnie zgodnie z zasadami ich obsługi i użytkowania.

Artykuł 11. CZAS TRWANIA UMOWY

Niniejsza Umowa wynajmu zostaje zawarta na okres trzech lat poczynając od dnia dostawy maszyn - zgodnie z Artykułem 4..
W ciągu całego czasu trwania kontraktu VICTORIA zobowiązuje się do dotrzymania warunków i utrzymania maszyn w odpowiedniej siedzibie oraz nie rozwiązywania kontraktu przed ustaloną datą jego zakończenia.

Artykuł 12. ZASTRZEŻENIE PRAWA WŁASNOSCI. PRAWO WŁASNOSCI

Maszyny, będące przedmiotem wynajmu, pozostają własnością ROMA przez cały okres wynajmu. ROMA zastrzega sobie prawo inspekcji maszyn u najemcy.
Po upływie okresu przewidzianego na wynajem maszyn, będących przedmiotem niniejszej Umowy, zostaną one zwrócone ROMIE, koszty transportu, opakowania, ubezpieczenia, opłaty celne i inne przy zdawaniu we Włoszech poniesie VICTORIA.

ROMA akceptuje, od zaraz, propozycję ostatecznego odstąpienia VICTORII maszyn będących przedmiotem wynajmu po upływie ważności niniejszej Umowy i po zapłaceniu ostatniej raty w zamian za płatność w wysokości DEM 2.190,-.

W takim przypadku Victoria powinna powiadomić, na miesiąc przed wygaśnięciem Umowy, o zamiarze dokonania zakupu.

Artykuł 13. IMPORT CZASOWY

VICTORIA zobowiązuje się uzyskać od władz polskich zezwolenia na czasowy import maszyn bądących przedmiotem niniejszej Umowy i weźmie na siebie wszelkie ciężary i jakiekolwiek opłaty, których zażądają władze polskie w związku z wprowadzeniem maszyn na teren Polski.

Artykuł 14. CESJA UPRAWNIEŃ

Victoria będzie mogła przenieść swoje uprawnienia przysługujące w ramach niniejszej Umowy jedynie za zgodą ROMY.
VICTORIA przyjmuje, od zaraz, iż wszelkie uprawnienia wynikające z niniejszej Umowy mogą być odstąpione przez Romę osobom trzecim (zmiana wierzyciela).

Artykuł 15. ZMIANY

Niniejsza Umowa będzie mogła być zmieniona wyłącznie w formie pisemnej za zgodą obydwu stron.

Artykuł 16. WEJSCIE UMOWY W ŻYCIE

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Niniejsza Umowa wchodzi w życie po:
- podpisaniu jej przez obydwie strony,
- płatności kwoty DEM 65.685,- stanowiącej zaliczkę w wysokości 15% wartości dostawy, dokonanej w sposób przewidziany w Artykule 2 niniejszej Umowy,
- dostarczeniu Promissory Notes,
- przedstawieniu gwarancji bankowej wspomnianej w Artykule 3.,
- uzyskaniu niezbędnych zezwoleń od kompetentnych władz polskich i włoskich, co powinno być potwierdzone przez strony teleksem.

Gdyby w ciągu trzydziestu dni od daty dzisiejszej strony nie uzyskały wspomnianych zezwoleń, niniejsza Umowa wygasa i będzie musiała, ewentualnie, być zastąpiona.

Artykuł 17. SĄD ARBITRAŻOWY

Wszelkie spory wynikające z niniejszej Umowy, jakie mogą powstać pomiędzy stronami, w przypadku gdyby nie było możliwe ich polubowne rozwiązanie, będą rozstrzygane poprzez zwrócenie się do Sądu Arbitrażowego, powołanego zgodnie z zasadami Międzynarodowej Izby Handlowej w Paryżu, mianowicie trzech arbitrów odbędzie się według tych zasad i będzie powierzone Międzynarodowej Izbie Handlowej w Wiedniu.

Artykuł 18. SPORZĄDZENIE UMOWY

Niniejsza Umowa została sporządzona w dwóch egzemplarzach w języku włoskim, jeden z nich dla Romy i jeden dla VICTORII. Oprócz wspomnianych egzemplarzy do Umowy dołączone są Załączniki A) i B) wymienione poprzednio i stanowiące jej integralną część.

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VICTORIA
Spółka Cywilna

ROMA S.p.A.

Załącznik A)

U m o w a n a j m u Nr 069/92

1	MIXMARK 150 stacja do przygotowania mieszanki lodowej o wydajności 150 l/h	DEM	107.365,-
1	Zbiornik do produkcji wody lodowej z wbudowanym kompresorem 5 HP dla wymiennika płytowego	DEM	31.890,-
2	Serwofrezery	DEM	8.380,-
2	Frezery GELMARK-160	DEM	97.840,-
1	Napełniarka FILLMARK 3000	DEM	71.760,-
1	Urządzenie DVW do tortów	DEM	35.545,-
1	Komplet części zamiennych	DEM	13.515,-
		DEM	366.295,-
2	Urządzenia LIKOLAB-500	DEM	47.690,-
1	Superuno GP	DEM	23.915,-
	RAZEM:	DEM	437.900,-

jak w kontrakcie podpisanym przez firmę VICTORIA Spółka Cywilna.

Wszystkie warunki i gwarancje przewidziane w powyższym kontrakcie będą potwierdzone firmie VICTORIA Spółka Cywilna, przez firmę MOYER S.p.A., wraz z akceptecją zlecenia nabycia wystawionego przez ROMĘ S.p.A.

dostawa - CIF

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Wartość ogólna - DEM 437.900,-

ZAŁĄCZNIK B)

Messrs.
ROMA S.p.A
I t a l y

.....

Our Letter of Guarantee No.

This Letter of Guarantee refers to the undermentioned Promissory Notes subscribed by VICTORIA Spółka Cywilna - POLAND to your order, and we hereby confirm the authenticity and validity of their signatures.

	Amount	Maturity
DEM	72.757,-	six months from issuing
DEM	72.757,-	twelve months from issuing
DEM	72.757,-	eighteen months from issuing
DEM	72.757,-	twenty four months from issuing
DEM	72.757,-	thirty months from issuing
DEM	72.757,-	thirty six months from issuing

TOTAL DEM 436.542,-

We hereby irrevocably and unconditionally guarantee to effectively pay in the Deutsche Marks above mentioned Promissory Notes, without deduction for and free of any present or future taxes, imposts, levies or duties of any nature, to the beneficiary, endorser and bonafide holder upon first demand, in case VICTORIA Spółka Cywilna, fails to pay them at their respective maturities.

This guarantee is in conformity with the official exchange regulations in Republic of Poland.

This letter of guarantee expires two months after the last maturity.

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Yours faithfully.

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ILE KREDYTU ?

Bierzemy pięć miliardów kredytu stwierdził Adam Ważny, właściciel i dyrektor generalny firmy ONEMAN, otwierając ostatnie w 1993 roku posiedzenie zarządu firmy . Dla dwóch pozostałych członków zarządu słowa właściciela nie były niespodzianką. Już od kilku miesięcy Adam Wazny podkreślał, że czas najwyższy by firma rozpoczęła korzystać z bankowych źródeł finansowania rozwoju. Jesteśmy ewenementem w regionie - kontynuował właściciel. W ciągu pięciu lat funkcjonowania firmy ani razu nie skorzystaliśmy z kredytu bankowego . W tym okresie zatrudnienie wzrosło z siedmiu do stu sześćdziesięciu pracowników . Obroty z 800 milionów złotych wzrosły do ponad 50 miliardów. Wartość zapłaconych podatków z 200 milionów w roku 1990 doszła do ponad trzech miliardów w roku obecnym. Rozpoczęliśmy opłacalny eksport. Dalszy rozwój firmy wymaga kredytu. Adam Ważny nie bez powodu przypomniał najważniejsze fakty dotyczące rozwoju firmy.

Doskonale znał niechętny stosunek dyrektora ekonomicznego do swojego pomysłu . Jerzy Grosz odpowiedzialny za finanse, rozliczenie kosztów i właściwą informacje o kondycji firmy wiedział, że tym razem będzie musiał ustąpić ale kwota pięciu miliardów była dla niego dużą niespodzianką . Miliard - to wszystko na co firma może sobie pozwolić, stwierdził. Pracując od trzech lat w firmie ONEMAN , posiadając ponadto dziesięcioletnie doświadczenie w zarządzaniu finansami dużego przedsiębiorstwa państwowego produkującego meble, którego kłopoty finansowe rozpoczęły się na początku reformy Balcerowicza, Jerzy Grosz uważał , że przede wszystkim należy dokładnie przeanalizować konieczność i koszty kredytu. Pamiętał, że kłopoty w jakie popadła jego poprzednia firma nie wynikły ze złego pomysłu. Wówczas zaciągnęli kredyt pod realizację zamówienia eksportowego do Szwecji. Wymagało ono budowy nowego wydziału w przedsiębiorstwie. Wszystko było dobrze do stycznia 1990 roku. Gwałtowny wzrost oprocentowania kredytu z kilku procent w skali roku do ponad stu za styczeń rozłożył przedsiębiorstwo.

Dyrektor ekonomiczny uważał, że płynny rozwoj firmy ONEMAN oparty na harmonijnym połączeniu produkcji mebli oraz ich sprzedaży stał się możliwy dzięki nie tylko właściwej strategii rozwoju produktu i jego sprzedaży. Istotną rolę odegrała jego zdaniem także rozsądna polityka zarządzania finansami.

Panie Jurku nie mamy chyba innego wyjścia ?, stwierdził Henryk Bos, dyrektor techniczny ONEMAN-a. Potrzebujemy pieniądze by zakupić drewno bukowe. Wie Pan bardzo dobrze , że po wydzierżawieniu drugiego tartaku mamy ogromne możliwości przerobu drewna na

łaty i fryzy meblowe.Mamy pełny portfel zamówień od krajowych fabryk mebli.Rownież nasz nowy kontrahent z Niemiec jest bardzo zainteresowany dalszą dostawą tarcicy bukowej.
To wszystko prawda - odpowiedział dyrektor Grosz.Ale?Czy nie zapominamy o kilku istotnych sprawach. Odbiorca niemiecki znowu zalega nam z zapłatą za dwie ostatnie dostawy na kwotę prawie 700 milionów złotych.Krajowym fabrykom mebli dostarczyliśmy elementów ramowych do mebli za ponad trzy miliardy złotych.Otrzymaliśmy co prawda do naszego salonu meblowego zestawy meblowe za 800 milionów złotych ale sprzedaliśmy do tej pory tylko połowe.Sądzę,że powinniśmy rozpocząć poszukiwanie środków na zakup drewna bukowego od bardziej zdecydowanej polityki w stosunku do naszych dłużników krajowych i firmy HUNTER z Baddorfu. Jeśli w ciągu najbliższych czterech tygodni uzyskamy przynajmniej połowę naszych należności to nie widzę potrzeby zaciągania kredytu na kwotę większą niż miliard.
Pieniędzy potrzebujemy za dwa, najpóźniej trzy tygodnie nerwowo replikował szef Ważny. Mimo naszych dobrych kontaktów z nadleSnictwami,które są głównym dostawcą drewna nie możemy liczyć na odroczenie płatności.Ze względu na duży popyt żądają gotówki.Jeśli nie wyłożymy gotówki to sprzedadzą konkurencji!
Niestety ,nie możemy czekać z kupnem drewna,dodał dyrektor techniczny.W okresie letnim buk nie nadaje się do przerobu ze względu na występowanie zaparzeń.Szybkie i terminowe pozyskanie drewna to rzecz najważniejsza!
Zdaję sobie z tego bardzo dobrze sprawę, zdecydowanym głosem włączył się ponownie do dyskusji dyrektor Grosz.Ale przecież nie potrzebujemy drewna aż za pięć miliardów złotych,najwyżej za trzy miliardy.Więcej nie będziemy w stanie w naszych dwóch tartakach przed latem przerobić.Już w tym roku część drewna bukowego przerabialiśmy latem i odbiorcy składali reklamacje odnośnie jakości.Musieliśmy zgodzić się na przekwalifikowanie kilku ostatnich dostaw do niższej klasy.Straciliśmy na tym sto milionów złotych!
Przerobem będziemy się martwić póżniej,na dziś najważniejsze jest drewno odpowiedział nie ustępując szef ONEMAN-a.Lepiej kupić więcej niż wpuścić konkurencję.Jak kupią za dużo to zaczną psuć rynek.A ponadto kredyt to koszty.W tym roku zapłacimy prawie miliard złotych podatku dochodowego.Po to mam dyrektora ekonomicznego żebym nie musiał płacić za dużych podatków.A co do przerobu to jest do kupienia tartak za trzy miliardy złotych.Zastanawiam się właśnie czy nie powinniśmy się tym zainteresować. .

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P Y T A N I A

1. Wybierz argumenty za zaciągnięciem kredytu w kwocie pięciu miliardów złotych.

2. Wybierz argumenty przeciw zaciągnięciu kredytu w kwocie pięciu miliardów złotych.

3. Wskaż argumenty za zaciągnięciem kredytu w kwocie jednego miliarda złotych.

4. Wskaż, która z trzech postaci: właściciel ONEMAN-a Adam Ważny, dyrektor ekonomiczny Jerzy Grosz, dyrektor techniczny Henryk Bos, jest ci najbliższa i uzasadnij dlaczego.

5. Dokonaj analizy SWOT firmy ONEMAN

6. Podaj jakich informacji Twoim zdaniem nie przedstawili uczestnicy dyskusji, które mogły by mieć wpływ na jej przebieg i na podjęcie decyzji.

7. Jaka byłaby Twoja decyzja gdybyś był właścicielem firmy ONEMAN.

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APPENDIX

8.0

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CONDUCT FACULTY UPGRADING WORKSHOPS

PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 15 J 94

Age: 29 Sex: [X] M [ ] F

Title/Topic of this course: Marketing

Location: Rosario

Your Current Occupation:

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education:

Field of Study

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

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INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

Continued on back of page

BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	X	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 14-15T 94

Age: 33 Sex: [X] M [ ] F

Title/Topic of this course: Management

Location: Poznań

Your Current Occupation:

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education:

Field of Study

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	(4)	3	2	1
2.	The instructional materials are well designed.	2.	5	(4)	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	(4)	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	(1)
5.	The instructor seem to be concerned about the participants progress.	5.	(5)	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	(6)	5	4	3	2	1
7.	The course met my expectations.	(7)	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	(1)
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	(1)
10.	The facility was well suited for this program.	10.	(5)	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	(4)	3	2	1

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BEST AVAILABLE DOCUMENT

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2.	I would take this course again.	12.	5	4	3	2	1
3.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
4.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
5.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
6.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 15 J 1994

Age: 32 Sex: [X] M [ ] F

Title/Topic of this course: Marketing

Location: Dawat

Your Current Occupation:

Your Occupational Goals:

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education:

Field of Study

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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BEST AVAILABLE DOCUMENT

Continued from front page.

12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

THE FOLLOWING SECTION IS FOR PARTICIPANTS WHO HAVE COMPLETED A PROGRAM OR HAVE COMPLETED AT LEAST ONE COURSE OF STUDY.

Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

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PARTICIPANT INQUIRY FORM

DEMOGRAPHIC INFORMATION:

Date of Inquiry: 1ST

Age: _____ Sex: [ ] M [X] F

Title/Topic of this course: Marketing

Location: Dorrei

Your Current Occupation:

Your Occupational Goals:

How did you hear of this program?

- [ ] Advertisement
- [ ] Friend
- [ ] Teacher/Professor
- [ ] Work
- [ ] Found out on my own
- [ ] Other _____

Does your current job involve teaching others? [X] Yes [ ] No

Does your current job involve supervising others? [X] Yes [ ] No

Highest Level of Education:

Field of Study

INSTRUCTIONS:

Your response to these questions will be used to improve future programs. Your opinion is important to us.

Please score each statement by either circling a 5 (strongly agree with the remark) or a 1 (strongly disagree with the remark). You may also mark between these numbers (2, 3, or 4) if this seems a more appropriate response. There are no "correct" answers to these questions.

Thank you.

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The quality of instruction was excellent.	1.	5	4	3	2	1
2.	The instructional materials are well designed.	2.	5	4	3	2	1
3.	The content of this course is relevant to my needs.	3.	5	4	3	2	1
4.	The instructor covered material that was beyond my understanding.	4.	5	4	3	2	1
5.	The instructor seem to be concerned about the participants progress.	5.	5	4	3	2	1
6.	The instructors seemed to be well versed in the topic as it relates to my country.	6.	5	4	3	2	1
7.	The course met my expectations.	7.	5	4	3	2	1
8.	The course was not relevant to the business situation I am currently experiencing.	8.	5	4	3	2	1
9.	The instructional materials are difficult to understand.	9.	5	4	3	2	1
10.	The facility was well suited for this program.	10.	5	4	3	2	1
11.	The classroom equipment used is well suited for this program.	11.	5	4	3	2	1

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12.	I would take this course again.	12.	5	4	3	2	1
13.	I would recommend this course to other interested parties.	13.	5	4	3	2	1
14.	The Video Presentations were well suited to the course.	14.	5	4	3	2	1
15.	The Video portion of the course was of high quality.	15.	5	4	3	2	1
16.	Translators/Interpretors were very helpful in helping me to understand the material.	16.	5	4	3	2	1

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Comment here on the overall quality of the program:

			Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
	As a result of my participation in this program I have achieved:						
1.	Professional Advancement	1.	5	4	3	2	1
2.	Greater Professional Skills	2.	5	4	3	2	1
3.	Exposure to Professional and/or Personal Contacts	3.	5	4	3	2	1
4.	Diploma or Certificate of Completion	4.	5	4	3	2	1
5.	Salary Increase	5.	5	4	3	2	1
	As a result of my participation/training in this program I am now:						
6.	Better Able to Manage People	6.	5	4	3	2	1
7.	Better Able to Complete Research	7.	5	4	3	2	1
8.	Better Able to Direct Projects	8.	5	4	3	2	1
9.	Better Able to Teach Others	9.	5	4	3	2	1
10.	Better Able to Make Policy	10.	5	4	3	2	1
11.	Better Able to Lead Company	11.	5	4	3	2	1
12.	I attended the program regularly	12.	5	4	3	2	1
13.	The project staff is very helpful	13.	5	4	3	2	1
14.	The overall program will increase my understanding of the free market economy	14.	5	4	3	2	1
15.	The overall program will have long lasting benefits	15.	5	4	3	2	1
16.	The overall program seems to be well organized	16.	5	4	3	2	1
17.	Access to instructors and project staff is quite good	17.	5	4	3	2	1
18.	I have been able to establish valuable business contacts	18.	5	4	3	2	1

Thank you for your time and cooperation.

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SEMINAR FOR INSTRUCTORS

Content/Trends Update and Pedagogical Development

Sponsored by: the Polish/American Enterprise Institute: Poznan

Date:_____/_____/_____

Location:_____

==========

Agenda:

1400: Introductions and Explanation of program.

14:30 Presentation: "Pedagogical Design of Instruction Intended for Lay Business Men and Women." Dr. John E. Turner, Old Dominion University, Norfolk, Virginia. CETE Consultant.

15:30 Topic # 1 (to be selected from list on separate page with presenter also selected by Zdzislaw)

16:15 Small group discussion of Topic # 1 with each group having designated leader. Group reports at end of 15 minutes on how the topic should be presented to business men and women in the institute classes. John Turner will moderate the discussion with assistance from interpreter.

16:45 Topic # 2 (to be selected from list on separate page with presenter also selected by Zdzislaw)

17:30 Small group discussion just like topic one.

18:00 Adjourn for evening.

DAY TWO

09:00 Topic # 3 (to be selected from list on separate page with presenter also selected by Zdzislaw)

09:45 Large group Brainstorming session regarding how the topic could best be taught with practical application to business men and women. (Brainstorming session moderated by Turner with assistance from interpreter, and one audience volunteer to record on chalkboard.

10:00 Topic # 4 (to be selected just like 1st three)

10:45 Small group discussion with appointed group leader. Groups to report out after 15 minutes regarding methods of providing practical application during Institute classes. (moderator, Turner)

11:15 Break (refreshments)

11:45 Topic # 5 (same method)

12:30 Group discussion using some method of generating input from participants. (moderator Turner)

13:00 Conclusion and summation of seminar (Zdzislaw)

13:30 Adjourn

A Progam of Marketing Seminar organized by
the Polish-American Enterprise Institute
January 14, 1994

THURSDAY January 13, 1994

21.00 p.m.	-	Participants' arrival. Hotel "Rzymski" Marcinkowskiego 22.

FRIDAY January 14, 1994

8.00 - 9.00 a.m.	-	Breakfast at "Rzymski" Hotel
9.30 - 10.00	-	Introduction to the Marketing Seminar - Łukasz Pawelczak
10.00 - 13.00	-	Program presentation and methodology related to teaching "Marketing"
10.00 - 11.00	-	Marketing Management in the period of economic transition - Prof. Henryk Mruk
11.00 - 11.30	-	Coffee break
11.30 - 12.30	-	Market Research - a basic marketing strategy - Dr. Bogdan Sojkin
12.30 - 13.30	-	Promotion - method, forms, effectiveness - Jacek Koll
13.30 - 14.30	-	Lunch
14.30 - 16.00	-	Marketing Modul Presentation by PAEI Białystok Marketing Modul Presentation by PAEI Rzeszów
19.00 p.m.	-	Dinner

SATURDAY January 15, 1994

8.00 - 9.00 a.m.	-	Breakfast "Rzymski" Hotel
9.30 - 10.30	-	Marketing and "Non-Profit" Organizations
10.30 - 11.30	-	Marketing and Banks - Dr. Wojciech Piotr
11.30 - 12.00	-	Coffee break
12.00 - 13.30 p.m.	-	Marketing and a small busienss - Dr. Marek Piechcki and Slawomir Jezierski Discussion on "Marketing Strategy Modules while economic transformation"
13.30 - 14.30	-	Lunch
14.30 - 16.00	-	Closing discussion on how to improve teaching methods amd training materials of the Marketing Module - participants

Program seminarium z modułu

"MARKETING"

CZAWARTEK 13.I.1994 R.

21,oo - Przyjazd uczestników seminarium.Zakwaterowanie w hotelu "Rzymskim" Al.Marcinkowskiego 22.

PIĄTEK 14.I.1994 R.

8.00 - 9.00 - Śniadanie w hotelu "Rzymskim"

9,30 -10.00 - Wprowadzenie do seminarium - mgr Łukasz Pawelczyk

10.00 -13.oo - Program i metodyka realizacji zajęć "Marketingu"

10.00 -11.00 - Zarządzanie marketingowe w warunkach transformacji - - prof,dr habm Henryk Mruk

11,00 -11,30 - Przerwa na kawę.

11,30 -12,30 - Badania rynkowe - jako podstawa strategii marketingowej - dr Bogdan Sojkin.

12,30 -13,30 - Promocja - metody, formy, skuteczność - mgr Jacek Koll.

13,30 -14,30 - Lunch.

14,30 -16,00 - Prezentacja realizacji modułu "Marketing" w Instytucie Przedsiębiorczości w Białymstoku.
Przedstawiciel IP z Białegostoku.
Prezentacja realizacji modułu "Marketing" w Polsko-Amerykańskim Instytucie Przedsiębiorczości w Rzeszowie.
Przedstawiciel IP z Rzeczowa.

19.00 - Uroczysta kolacja.

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SOBOTA 15.I.94 R.

8,00 - 9,00 - Śniadanie w hotelu "Rzymskim".

9,30 - 10,30 - Marketing w instytucjach "no profit"
dr Jerzy Kur

10,30 - 11,30 - Marketing w instytucjach /na przykładzie banku/
dr hab. Wojciech Piotr.

11,30 - 12,00 - Przerwa na kawę.

12,00 - 13,30 - Marketing w small biznesie - dr Marek Piechcki
mgr Sławomir Jeziersk
Dyskusja na temat "Modele strategii marketingowej w okresie transformacji.
dr hab. Wojciech Piotr.

13,30 - 14,30 - Lunch.

14,30 - 16,00 - Dyskusja końcowa nt."Doskonalenie procesu dydaktycznego i materiałów szkoleniowych z modułu "Marketing" - uczestnicy seminarium.

DYREKTOR INSTYTUTU
dr Zdzisław Krajewski

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Lista uczestników seminarium z Marketingu.

1.	Andrzej Jurgielewicz	–	Białystok
2.	Krzysztof Porębski	–	Białystok
3.	Teresa Bal	–	Rzeszów
4.	Krzysztof Mazur	–	Rzeszów
5.	Wojciech Piotr	–	Poznań
6.	Jerzy Kur	–	Poznań
7.	Marek Piechocki	–	Poznań
8.	Sławomir Jezierski	–	Poznań
9.	Henryk Mruk	–	Poznań
10.	Bogdan Sojkin	–	Poznań
11.	Jacek Kall	–	Poznań
12.	Łukasz Pawelczak	–	Poznań
13.	Zdzisław Krajewski	–	Poznań

APPENDIX

9.0

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CONDUCT POLISH
NATIONAL
CONFERENCE

III International Entrepreneurship Forum

ENTREPRENEURSHIP AND REGIONAL DEVELOPMENT

The address:

Hotel Gdynia
ul. Armii Krajowej 7
tel. (58)206661/ fax (58)208651
Gdynia, Poland.

Sessions subjects:

* Regional approach to entrepreneuship.
* Proper education for entrepreneurs- examples from chosen regions of Poland.
* Coordinating support programs implemented in Poland.
* Making women active in fighting unemployment- regional examples.

Presentations:

One page abstracts are due to 20 April 1994.

Program:

15 May

3:00-6:00 pm Registration at Hotel Gdynia;
6:00-9:00 pm Reception.

16 May

9:00-11:00 am Grand Opening;
11:00-6:00 pm Concurrent Sessions.

17 May

8:30-10:00 am General Session;
10:00-1:30 pm Concurrent Sessions;
1:30-2:30 pm Official Closing;
2:30 pm Dinner, Adjourn.

ECONOMIC FOUNDATION
NSZZ SOLIDARNOŚĆ

80-855 GDAŃSK
ul. Wały Piastowskie 24
POLAND

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

Gdańsk,10th March 1994

Dear colleague,

We invite you to join us on May 15-17 in Gdynia on the shores of the Baltic in Poland to participate in the third annual "Busines Faculty Enterpreneurship Forum of Ideas". III National Enterpreneurship Forum "Enterpreneurship and Regional Development" will feature market economics education programs from all over Poland and other eastern and central European countries. The audience will be university business and economics faculty members from all over Poland.

If you would like to share your program at the conference,please send me a one-page abstract of the ideas you would like to present and names and addresses of all presenters/panel members. We will not ask for formal papers at the conference although you are certainly welcome to bring them. We will use your one-page abstract as a part of the program for all participans.We must receive your abstract and commitment to participate no later than April 20,1994 so that the program can be finalized.

The agenda is currently under development and will be avaiable prior to the conference.The format for conference is as follows:

Sunday, May 15;	Reception and Welcome
Monday, May 16;	General Session; Concurrent Sessions; Luncheon/Speakers; Concurrent Sessions
Tuesday,May 17;	Concurrent Sessions; Luncheons Speakers

The Gdynia Hotel is a large and modern facility that will accommodate you comfortably for $40 per night. Please make your own hotel reservations (58 48 22 66 61).The reserved block of rooms are in the name of the Solidarity Economics Foundation.

We look forward to a great Forum and hope you will be part of it.

Sincerely,

Unterschuetz

Alicja Unterschuetz
Solidarity Economics Foundation

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SUMMARY KOPKA CROSS-CULTURAL COMPARATIVE RESEARCH OF POLISH AND AMERICAN ENTREPRENEURS AND MANAGERS

This cross-cultural comparison sought to examine the similarities and differences between Polish and American entrepreneurs and managers. The comparison concentrated on three broad categories, personality characteristics (P), environmental perceptions (E), and business behaviors relating to marketing and ethical practices (B). These categories correspond to Kurt Lewin's model of human behavior which proposes that behavior is a function of an individual's personality and environmental perceptions: B=F(P,E).

To make these comparisons, data was collected in each country using the same survey questionnaire, with a Polish language version used in Poland and an English version in the United States. The Polish samples consisted of 45 entrepreneurs and 14 managers, and the American samples included 12 entrepreneurs and 11 managers. These are small sample sizes, particularly in the United States, which means that any research results must be interpreted with caution. In addition, additional survey responses are expected in the United States during late-April, and May 1994 which may also affect research results. Despite these limitations, some significant results were identified in initial data analyses, first for the Polish samples, and then cross-culturally between Poland and the United States.

For the comparisons within Poland, Polish entrepreneurs indicated personalities (P) more given to risk taking and interests in being independent than Polish managers. They were also much more likely to have started other businesses: no Polish manager had ever started a business. In addition to these limited personality differences, Polish entrepreneurs perceived less favorable environmental conditions than managers. Polish entrepreneurs indicated that their industry-market conditions were less favorable than those facing managers. Entrepreneurs were also relatively more concerned about unfavorable influences from organized religion, the attitudes of political

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parties and government officials toward business, and the economic policies and programs of the government.

Both Polish entrepreneurs and managers seemed to be in substantial agreement regarding the most unfavorable environmental conditions facing business. The most strikingly unfavorable conditions included the availability and interest rates on bank credit, the rate of inflation, regulations protecting private property, availability and costs of buildings, the telecommunications system, the stability of the country's political system, tax rates on company income, the level of corruption in business activity, and the conditions in rural areas. Interestingly, both entrepreneurs and managers had favorable perceptions of the capabilities of their respective firms.

The cross-cultural comparisons between the Polish and American entrepreneurs provided some interesting results. In terms of personality, P, Polish entrepreneurs had a greater orientation toward competing with others. Polish entrepreneurs saw their lives as being more determined by chance events than did American entrepreneurs, but they were also more tolerant of environmental uncertainties. Both Polish and American entrepreneurs shared the same interests in obtaining financial rewards, but Polish mangers were much more interested that American managers in obtaining financial returns. Aside from these personality characteristics, Polish entrepreneurs tended to have less financial management experience and training and were younger than American entrepreneurs. They also had a greater tendency to start their businesses with family and friends than American entrepreneurs.

In terms of environmental perceptions, E, there were substantial differences in the Polish and American perceptions of their respective business environments. The Polish entrepreneurs perceived relatively more unfavorable political, economic, and internal company environments than the

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American entrepreneurs. On 29 of 59 specific environmental conditions, Polish entrepreneurs had significantly more unfavorable perceptions than American entrepreneurs. Among these differences, Polish entrepreneurs saw the availability and interest rates on bank credit, rate of inflation, the telecommunications system, government tax policies for private investment, and conditions in rural areas as more unfavorable for their business than did Americans. In contrast, American entrepreneurs saw more unfavorable environmental conditions regarding mandatory contributions to social programs, conditions in urban areas, and racial and ethnic prejudices within the society. Interestingly, both Polish and American entrepreneurs had fairly high and not significantly different unfavorable perceptions of the level of corruption in business activity and criminal activity in society.

The last category for comparison is behavior, B. In terms of behavior, two areas were examined: marketing behavior and responses to ethical dilemmas. For their respective marketing behaviors, the self-reports of Polish and American entrepreneurs did not reveal any statistically significant differences. Polish entrepreneurs' reported marketing behaviors appear comparable to those of American entrepreneurs. Regarding ethical dilemmas, Polish entrepreneurs indicated that several ethically questionable practices were more acceptable than did American entrepreneurs. These included making payments to government officials in order to obtain business licenses, using government contacts to obtain needed supplies or equipment, under reporting of sales in order to reduce tax payments, giving misleading tax information to bank officials in order to obtain a loan, and a government official directing government business to a private company in which the official has an interest. However, even though Polish entrepreneurs were more accepting of these practices than Americans, they also tended to view these practices as relatively unacceptable.

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APPENDIX 10.0

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FINANCIAL REPORT

FINANCIAL STATUS REPORT

(Short Form)

(Follow instructions on the back)

Federal Agency and Organizational Element to Which Report is Submitted	2. Federal Grant or Other Identifying Number Assigned By Federal Agency	OMB Approval No.	Page	of
Agency for International Development Office of Financial Management	EUR-0029-G-00-1040-00	0348-0039	1	1 pages

Recipient Organization (Name and complete address, including ZIP code)

The Ohio State University Research Foundation
1960 Kenny Road
Columbus, Ohio 43210-1063

Employer Identification Number	5. Recipient Account Number or Identifying Number	6. Final Report	7. Basis
31-6401599	724951/769185-01	☐ Yes ☒ No	☐ Cash ☒ Accrual

Funding/Grant Period *(See Instructions)* From: (Month, Day, Year)	To: (Month, Day, Year)	9. Period Covered by this Report From (Month, Day, Year)	To: (Month, Day, Year)
5 / 28 / 91	6 / 20 / 94	1 / 01 / 94	3 / 31 / 94

Transactions:	I Previously Reported	II This Period	III Cumulative
a. Total Outlays	2,896,139.25	164,385.69	3,060,524.94
b. Recipient share of outlays	146,435.28	1,280.78	147,716.06
c. Federal share of outlays	2,749,703.97	163,104.91	2,912,808.88
d. Total unliquidated obligations			22,024.27
e. Recipient share of unliquidated obligations			249.76
f. Federal share of unliquidated obligations			21,774.51
g. Total Federal share *(Sum of lines c and f)*			2,934,583.39
h. Total Federal funds authorized for this funding period			2,937,897.00
i. Unobligated balance of Federal funds *(Line h minus line g)*			3,313.61

Indirect Expense	a. Type of rate (Place "X" in appropriate box) ☐ Provisional ☒ Predetermined ☐ Final ☐ Fixed			
	b. Rate 29%	c. Base 77,988.31	d. Total Amount 23,897.38	e. Federal Share 22,616.60

Remarks: Attach any explanations deemed necessary or information required by Federal sponsoring agency in compliance with governing legislation.

Certification: I certify to the best of my knowledge and belief that this report is correct and complete and that all outlays and unliquidated obligations are for the purposes set forth in the award documents.

Typed or Printed Name and Title	Telephone (Area code, number and extension)
Richard W. Bradbury Manager, Fiscal Services	(614) 292-1381
Signature of Authorized Certifying Official	**Date report Submitted**
Richard Bradbury	May 9, 1994

Standard Form 269

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YEAR III
Financial Status Report

January-March 1994

	Revised Budget	11th Quarter Total	3 Year Total to Date	Encumbered	Balance
Salaries	$653,321	$27,455	$622,928	$	$30,393
Fringe Benefits	163,553	7,651	158,727		4,826
Consultants	155,277	19,547	149,553	500	5,224
Travel/Per Diem	305,375	11,483	278,825	10,769	15,781
Materials	52,624	56	31,474		21,150
Equipment	32,292	—	35,127		- 2,835
Subcontract	1,006,000	62,500	1,000,335	6,165	- 500
Other	124,652	11,795	194,775	719	- 70,842
SUBTOTAL	$2,493,094	$140,487	$2,471,744	$18,153	$3,197
Indirect	444,803	22,617	441,064	3,622	117
TOTAL	$2,937,897	$163,104	$2,912,808	$21,775	$3,314

SOLIDARNOŚĆ FOUNDATION FINANCIAL SUMMARY

YEAR III

	BUDGET	EXPENSES First Quarter	EXPENSES Second Quarter	EXPENSES Third Quarter
A. INSTITUTES				
Operations	$120,000	---	$30,000	$30,000
Satellite Centers	90,000	---	22,500	22,500
Faculty Seminars	30,000	---	15,000	15,000
Equipment	12,000			
			$67,500	$67,500
Subtotal	$252,000	$52,500		
B. SOLIDARNOŚĆ FOUNDATION				
	10,000	2,400	2,400	2,400
Staff	2,000	---	100	150
Translations	5,000	325	580	300
Local Travel	28,000	17,474	---	---
U.S. Trip	1,000	110	215	250
Materials/Supplies	5,000	---	---	---
Equipment	3,000	150	150	---
Phones/Postage	8,000	---	50	---
National Confernece	5,000	---	---	---
Case Study Publication	---	---	457	550
Other				
Subtotal	$67,000	$20,459	$3,802	$3,650
TOTAL	$ 319,000	$ 72,959	$ 71,302	$ 71,150

AID Projects: Central and Eastern Europe (Financial Data, page 1)

Institution: Ohio State University

Quarter: YEAR III 3rd Quarter

Contact Person Regarding this Report: Catherine Ashmore

Project Component: Entrepreneurship Institutes

PROJECT EXPENDITURES	AID FUNDS Actual	AID FUNDS Projected	GRANTEE (COST SHARE) Actual	GRANTEE (COST SHARE) Projected	OTHER SOURCES Actual	OTHER SOURCES Projected	OTHER SOURCES Actual	OTHER SOURCES Projected	ACCRUED Actual	AID FUNDS REMAINING Actual	PROJECTED NEXT QUARTER Projected
Staff Salaries U.S. (Instruc.)	27.5								622.9	30.4	--
Staff Salaries U.S. (Staff)	--										
Fringe Benefits	7.6								158.7	4.8	--
Salaries Local	--										
Consultants	19.5								149.6	5.2	3.2
Travel - Per Diem	11.5								278.8	15.8	--
Nonexpendable Equipment	--								35.1	-2.8	--
Expendable Supplies	.1								31.5	21.1	--
Indirect Costs	22.6		13.3							.1	.1
Participant Costs	--										

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Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data- Page 2)

PROJECT EXPENDITURES	AID FUNDS		GRANTEE		OTHER SOURCES _____		OTHER SOURCES _____		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
Workshops, Seminars, Conf.											
Video/T.V. Production											
Subcontractor Solidarity	62.5		65.0						1,000.3	-500	--
Subcontractors _____											
Subcontractors _____											
Translation											
Scholarships											
Curriculum Development											
Other Direct Costs	11.8								194.8	-70.8	
Other _____											
TOTAL PAGE 1 & 2	163.1		78.3						2,912.8	3.3	3.3

Institution: Solidarity Economic Foundation

Quarter: YEAR III 3rd Quarter

Contact Person Regarding this Report: Alicja Unterschuetz

Project Component: Entrepreneurship Institutes

PROJECT EXPENDITURES	AID FUNDS		GRANTEE (COST SHARE)		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
Staff Salaries U.S. (Instruc.)											
Staff Salaries U.S. (Staff)											
Fringe Benefits											
Salaries Local	2.4								36.8	2.8	2.8
Consultants									10.0	1.8	1.8
Travel - Per Diem	.3								22.3	14.3	14.3
Nonexpendable Equipment	--								15.7	5.0	5.0
Expendable Supplies	.3								6.1	.4	.4
Indirect Costs											
Participant Costs											

Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data- Page 2)

PROJECT EXPENDITURES	AID FUNDS		GRANTEE		OTHER SOURCES		OTHER SOURCES		ACCRUED	AID FUNDS REMAINING	PROJECTED NEXT QUARTER
	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Projected	Actual	Actual	Projected
Workshops, Seminars, Conf.									20.0		
Video/T.V. Production									21.8		
Subcontractors	67.5		58.0						462.3	64.5	64.5
Subcontractors											
Subcontractors											
Translation	.2								3.0		
Scholarships											
Curriculum Development									15.3	5.0	5.0
Other Direct Costs	.5								7.9	1.7	1.7
Other Nat'l Conference									27.2	7.9	7.9
TOTAL PAGE 1 & 2	71.2								648.4	103.6	03.6

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THE OHIO STATE UNIVERSITY

CENTER ON EDUCATION AND TRAINING FOR EMPLOYMENT

1900 Kenny Road
Columbus, Ohio 43210-1090

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

June 10, 1994

Steve French
USAID
EUR/DR
Room 4720 NS
320 21st Street, NW
Washington, DC 20523-0053

Dear Mr. French:

Enclosed are three copies of our eleventh quarterly report on the Entrepreneurship Institutes Project in Poland (EUR-0029-G-00-1040-00). We have sent one copy to Warsaw and two copies to PPC/CDIE/DI under separate cover.

The three Institutes in Poland are operating on a regular basis with their faculty team and the community to expand the expertise of the local small business owners. We have been working with the Institutes to develop strategies to become self-sufficient after completion of the project.

Please let our project director, Dr. Cathy Ashmore, know if you have any questions or concerns.

Sincerely,

Ray D. Ryan
Executive Director

Enclosure

cc: Donald Pressley, USAID Representative, Warsaw
Leslie Koltai, Project Evaluator
M. Catherine Ashmore, Project Director

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