

PD-ABE-967  
80024



**ENTREPRENEURSHIP  
INSTITUTES  
IN  
POLAND**

**Fifth Quarterly Report  
June - September, 1992**

**CENTER ON EDUCATION AND  
TRAINING FOR EMPLOYMENT**

**The Ohio State University  
Columbus, Ohio**

**ENTREPRENEURSHIP INSTITUTES IN POLAND**  
**First Quarter Report - Year II**  
**July-September, 1992**

The first quarter of Year II of the U.S. Agency for International Development (U.S. AID) funded project began the activities to develop sustaining strategies for the three Enterprise Institutes in Poland and further preparing faculty members to provide business leadership in these three cities.

The goal of this project is to encourage teaching of market economics education with emphasis on entrepreneurship, small business management, marketing, finance, strategic planning, and small business consulting. In addition, we have added export-import in Year II. The strategy selected is to empower a large group of faculty in three universities to teach struggling new entrepreneurs in their cities, and to upgrade the competencies of these business owners to compete in a market economy. As a result, we will provide these faculty with new curriculum and teaching strategies that may be used as well in their economics and business classes. And, we will encourage these universities to build strong relationships with the emerging private sector of their communities.

## **BACKGROUND**

During this quarter, the government of Poland was reorganizing under the leadership of the new prime minister, Hanna Suchocka, representing the Democratic Union party and a coalition of seven parties in Parliament. Since this is the traditional "holiday" season in Poland, there was not a great deal of activity from the government, except the necessary reorganization of ministries and staff.

We recently received the report from the Central European Small Business Enterprise Development Commission on their work in Poland, the Czech and Slovak Federal Republic and Hungary. It is important to note that this U. S.-based project is setting up centers to provide consulting to business owners in Warsaw, Lodz, and Gdansk. They will base their materials and seminars on the work developed by the Small Business Administration in the U.S. Their program plans look similar to the work of this project but they have chosen the largest cities in the country rather than focus on areas that have less assistance available. (See section on Poland in the appendix).

Poland is looking more and more entrepreneurial. As we drove through the country on our visit in July, we observed new types of restaurants, great numbers of gasoline stations, and residential and commercial construction everywhere. This was in strong contrast to the lack of any visible commercial structure or entrepreneurial activity as we drove through Slovakia. Although the Polish people are very impatient to have a strong market economy, they seem to be moving quickly to make it happen in spite of their lack of funds or government support.

We read with interest the report prepared by Coopers and Lybrand for the Office of Women in Development of AID, entitled POLAND: GENDER ISSUES IN THE TRANSITION

**TO A MARKET ECONOMY.** The report identifies a need to consider gender issues in the development of Poland's private sector economy. Little has been done to address these issues, probably due to the fact that private enterprise is such a new phenomenon. "However, it also reflects a view held by many business people in Poland that gender is not an issue; many business people note that men and women face the same opportunities and constraints in developing new enterprises."

A team of interviewers decided that although there are no major legal or structural impediments specific to women in business, there is a definite difference in the numbers and types of businesses owned by women. Women make up 45.7 percent of Poland's labor force, 52.1 percent of the unemployed and the gender gap is slowly increasing. At the same time, they comprise a much small portion of small business owners and are a much smaller part of participants in credit programs, business training programs and business associations. Further, there is a great need for training for women because women are likely to be disproportionately laid off as a result of economic restructuring of the state firms. (See appendix for summary of the report).

## **SCOPE OF WORK**

At the end of this report is a listing of the events of the first quarter of Year II of this project. It represents activities in both the U.S. and Poland with emphasis on planning for Year II and development of sustainability of the program.

The appendix to this report includes examples of the work and results of staff activities in this quarter. We have included copies of some of the pictures taken of our staff and counterparts at work to give you a better view of our work in Poland.

### **1.0 Coordinate Program**

CETE staff continued to work cooperatively with the Solidarity Economic Foundation and the three Enterprise Institutes during this quarter to initiate new activities and solve problems.

We visited Poland in early July to meet with all staff and to make plans for the coming year. Regular communications continued throughout the quarter with weekly phone calls to Solidarity and regular fax and mail exchanges.

OSU prepared the subcontract with Solidarity for Year II and they made contracts with each of the Institutes for the work to be completed and the appropriate budgets.

We submitted the fourth quarter report in August and were late because of being in Europe during most of July. We were advised by AID that this would be acceptable. The report particularly focused on the success of the First Annual Entrepreneurship Forum in Poland which

was attended by over 250 educators and business people. It included a satellite conference between the conference and the Polish embassy which will be available on videotape later this year.

We met with Nina Majer in July to discuss plans for the year and our solutions to the problems in Poznan.

Alicja Unterschuetz replaced Alicja Zajaczkowska as part of the project staff in Gdansk for the second year of the project. We met with her and other counterpart staff to clarify outstanding issues and to make plans for the Polish visit to the U.S. and the training workshops in November. At this time, the coordinators from Bialystok, Rzeszow and Poznan also came to Gdansk to discuss plans for Year II. We discussed the need for developing plans for sustainability in the future and asked that each site prepare a business plan to discuss on their visit to the U.S. in August.

We also discussed the problems we were having with collecting evaluation forms as requested by Dr. Koltai. The major problem is that we are teaching both faculty and business owners and the terminology of the form is designed only for faculty. Also, we often teach the business owners more than one course but there is no way to differentiate this on the form. We agreed among ourselves how to submit this data so there would be conformity in the responses from OSU programs. For purposes of most of the business owners and a number of the faculty the forms needed to be translated and then the responses will need to be translated back into English. We also decided to collect more qualitative responses by adding questions of our own. Each site agreed to send the information requested directly to Dr. Koltai to facilitate timelines.

The Solidarity staff continued to communicate regularly with each site and to encourage appropriate activities within the schedule. They worked with members of the task force who were responsible for the International Small Business Congress which was scheduled in Warsaw in early October and represented the project at this major meeting. A new project brochure was developed in time to share at this meeting as well as to promote the project on a broader basis. (See Section 1 for their quarterly report).

CETE staff were asked to do an interview with the Voice of America representative that would be on the OSU campus in early October. In addition, the CETE Centergram ran an article on our two Polish staff members who are able to be in the U.S. while this project continues.

We interviewed a number of people to identify the best business school consultant to develop the new course on international trade. We selected Martha Cooper of the marketing department in the OSU College of Business and obtained her agreement to develop this new course starting right away in July. She will be assisted by a graduate student in her department. Plans were made to develop an outline to share in August and to make contacts with experts in this field as it relates to small business.

## **2.0 Develop and Update Materials**

Discussions in July with the three site coordinators and Solidarity revealed that there were still a number of additions and changes we would like to make to the five courses developed in Year I. These changes are as a result of input from the faculty and their attempts to add several units themselves throughout the year. Also, we decided that we need more activity-based types of teaching in the program and would focus on adding these to the existing courses.

The Polish coordinators and the U.S. consultants met for a week in August to work on these changes and to identify responsibilities for the completion of the work during the early fall.

A brief overview of the planned changes are as follows:

**ENTREPRENEURSHIP.** This unit was to have three sections added by the faculty in Poland (economics, computer use, and legal issues). The materials were provided to the sites in Year II but needed additional work before they actually matched the original course. Additional activities were developed for existing units.

**FINANCE.** One new unit is being added on the time value of money and capital budgeting techniques. Also, we have added a Polish case study (Pencil Manufacturing Co) to illustrate some of the financial planning issues. And Polish tax information was added after the laws were changed in 1992.

**MANAGEMENT.** A new unit was added on operations and additional materials were developed on hiring/firing and negotiations. The teaching outline was expanded and miscellaneous new activities were added to the existing course.

**MARKETING.** This course has been completely revised based on discussions with the faculty and poor communications between Poznan and the U.S. in the original work. They have now decided to eliminate the unit on market research and to add units on promotion, pricing, product, and distribution. This required a great deal of extra work by Gerry Hills this year but will result in a course that is more specific to the needs of the business owners.

**STRATEGIC PLANNING.** Very little needed to be done to this course except to add a number of specific application exercises. We also planned to add a strategic plan example that had been developed in Rzeszow.

**CONSULTING** - This is not a course but does include a sample case that is used in the training to allow trainees to practice their skills of consulting. This case will continue to be used as it was originally developed.

In addition to the existing materials, we added a complete new course this year on **EXPORT-IMPORT** to be used by small business owners. Martha Cooper developed the outline for the course before our August meeting at OSU with all the consultants and coordinators for

the project. After obtaining input from the group, she developed the course and sent it to Rzeszow for translation prior to the November training workshops.

Responsibilities for completion of the courses and presentation to the faculty are as follows:

**ENTREPRENEURSHIP - Vicky Rash and Andrzej Jurgilewicz**

**FINANCE - Lynn Neeley and Boguslaw Plawgo**

**MANAGEMENT - Gene Gomolka and Adam Goral**

**MARKETING - Gerry Hills and Walery Lach**

**STRATEGIC PLANNING - Randy Rollinson and Zdzislaw Krajewski**

**CONSULTING - Rod Terminello and Krzysztof Kaszuba**

**EXPORT-IMPORT - Martha Cooper and Krzysztof Kaszuba**

Resources were identified by the Polish coordinators that would be useful additions to their libraries and plans were initiated for CETE staff to purchase these items. The Polish coordinators asked that we spend some of their book budget on equipment if the items they needed are more than the budget allows. Although they appreciate having new resources, they point out that most of their participants and even some of the faculty cannot use books in English, and they did get quite a lot last year. Therefore, we will purchase their requested equipment before adding more resources beyond those identified on their trip to the U.S. (See section 2 for list of resources sent in Year II to-date)

Copyright permissions were requested for all new materials used for the courses. As usual, we feel it is important to have permission to use these items because they often come from published materials. Since we do not translate whole text books and sell the books to students (as in the U.S), it is important to have selected sections translated for the faculty to read...and sometimes even the business owners. If there were resources in Poland, this would not be necessary, but books on business are still very scarce in the Polish language.

### **3.0 Assist Enterprise Institutes**

CETE staff visited all three sites in July to determine the results of the program to date and the needs for the coming year. We met with the coordinators again in August when they visited Ohio and completed our plans. Since then, we have been in communication on a regular basis to prepare for the November meeting.

**Poznan.** In Poznan we visited their new offices in the Academy of Economics building.

Although Solidarity is still the local organizer, they now have offices and classrooms in the University which will make access easier for the faculty members. The rector has been extremely helpful in supporting the continuation of the Institute even though it did not work out to be part of the Management Center (as discussed in previous reports). We met with the coordinators and their new project assistant. She will be a great asset to the program because she is one of the simultaneous translators we have worked with there previously and has excellent English skills. Bogdan Sojkin has officially resigned as coordinator of the program and has been replaced by Zdzislaw Krajewski who was one of the faculty as well as the Solidarity Economic Foundation director.

We discussed their proposed business plan and suggested that including Lodz as part of their target market was probably too far away and too big for their budget. Rather we suggested that they concentrate their expansion on surrounding smaller towns. They feel that Poznan itself already has too many training programs and that they would do better in other areas. This will be a test of their ability to communicate at a distance and serve people outside their regular business area.

The classes had been completed and since it was summer they did not plan to start any new ones until after returning from the U.S. trip. They did not have much information because largely the classes were run by the Management Center as an effort to keep the peace. The same faculty work for both groups, but in Year II this will be changed. They will need to replace about eight instructors who do not choose to work for both organizations. This will give them an opportunity to bring in some new people and eliminate some of the bad experiences from Year I.

Schedules for the fall classes will be as follows:

Business Law:	October 9-11, 16-18
Finance:	October 23-25, November 6-8
Marketing:	November 13-15, 20-22
Strategic Planning:	November 27-29, December 4-6
Negotiations:	December 11-13

In addition, they plan to offer a specialized course for retailers, courses in English for the business owners, and more in-depth computer courses. Some will be offered in afternoons during the week and others on weekends.

**Bialystok.** We visited the Small Business Institute and heard of the results of the courses that had been taught so far. They had 14 business owners take part in the Entrepreneurship course and then 12 in all of the other 4 courses. They provided daily assistance to local business owners from the four teachers assigned each day to be available at the Institute. During the first three months they provided 80-90 consultancies in this way, mostly related to problems with law, taxes, and accounting.

The coordinators felt that major outcomes of the course for the business owners might be summarized as follows:

- \* they will have a changed relationship with the tax office
- \* they developed a conceptual framework for what they are already doing as well as getting new ideas
- \* they changed their way of management
- \* they want to continue contacts with faculty
- \* they are aware they can find trained employees in the management school

The brochure in Section 3 of this report provides information about the Bialystok School of Business and shows how the Entrepreneurship Institute is a part of the total school.

In addition to the courses we established, they also teach startup entrepreneurs. In 1992 they provided three courses for 60 people who wanted to start a business in the area. They were able to charge 1.5 million zloty for these courses.

During Year II, the Bialystok program expects to replace five instructors who have taken on other responsibilities. Their course schedule for the fall is as follows:

Enterprise Institute Program - October 8-December 6, 1992

Thursdays and Fridays: 4:30-9:00 p.m.; Saturdays: 9:00-11:00 a.m.

Business Start-up - October 12-November 21, 1992

Mondays and Tuesdays: 4:00-9:00 p.m.

Other special courses scheduled include Finance and Taxes, Marketing (50 hours), and Promotion (60 hours).

During this school year, they also plan to start a course for in-school students who are interested in learning how to be entrepreneurs. They will use some of the materials provided by the project for this activity also.

**Rzeszow.** In July we visited their new offices in a downtown building. They have staff offices, meeting rooms, and storage space that was not provided in an efficient way by the Rzeszow Technological University during Year I. During our visit, we met their new project assistant, who recently graduated from the university with a major in English. Like Poznan, they have support that will be very helpful with English language problems.

We also met with the staff of the Management Center to discuss their concerns about the programs of both groups. They assured us that there were different purposes for each program and there would be no problems with both groups operating in the community. However, we sense the need for the Management Center to feel in control to the detriment of the Entrepreneurship Institute coordinators and faculty. We will watch this problem closely.



During our stay in July, we participated in the Grand Opening of the Rzeszow Century Club which is patterned after the Washington Century Club that our coordinators visited in 1991. The U.S. organization gave them permission to use the name and feel somewhat a partner in the group. In Rzeszow, it is made up of 25-30 business owners who pay to be members and use the facilities of the Institute for their business needs. This is an excellent approach to building a sustaining operation for the future.

Rzeszow expects to lose about seven of their instructors for Year II but plan to replace them with new people prior to the November training program. Their class schedule for fall is as follows:

Entrepreneurship:	October 2-16, 1992
Marketing:	October 17 - November 6, 1992
Finance:	November 7-27, 1992
Management:	November 28-December 5, 1992
Strategic Planning:	December 12-19, 1992

We will have an opportunity to observe the situation closely in Rzeszow in November because we will be there for the three-week training program for faculty.

#### **4.0 Task Force Meetings**

We were able to encourage a number of national organizations to participate in our task force in Year I and look forward to expanding it in Year II. This group needs to build relationships and work together to solve issues in relationship to the emergence of an entrepreneurial economy. We plan to add a few new members in Year II as a result of new emphasis in the government on small business.

The next meeting of the task force is scheduled for November 23, 1992 in Warsaw. We plan to discuss the results of the November meetings, the plans for the May Forum, and to address some of the issues of common interest to all members.

#### **5.0 Visit U.S. Schools**

During July, we made final plans for the visit of the eight Polish coordinators to the U.S., August 1 - 23, 1992. Because Walery Lach was not able to attend, one of the instructors, Grzegorz Bartoszewicz, joined us from Poznan instead.

During the first week, they visited a number of Small Business Development Centers in New Mexico. We chose this as an example of what you can do in an area that has not been extensively developed as yet. They were able to learn more about consulting, running assistance centers and incubators. From there, they divided into two groups to attend the Academy of Management meeting in Las Vegas, or the American Marketing Association conference in Chicago. They were met at each site by our U.S. college of business consultants who introduced

them and helped them find the most useful parts of the program.

Following the conferences they came to Ohio to meet with our staff and continue working on Year II projects. In the last week, the U.S. consultants joined the Polish coordinators and CETE staff at OSU to work on changes in the courses and plans for November. (See detailed agenda in Section 5.0)

During their visit to OSU, the Polish coordinators reviewed their business plans with CETE staff and obtained input on improving them. In general, there was too much past history in the narrative and too little projection into the future. We asked them to develop a detailed plan for the next twelve months and a more general projection for the following two years. We asked them to write the plans in a way so that every quarter they could review where they had been and revise their projections for the next 4 quarters. They were encouraged to create new ways to find outside funding rather than relying too much on this project's funds. They seemed to have little planning for how they would get the students they needed or how to determine how much they would pay. Pricing was based on a cost analysis rather than on a market analysis. They seemed to clearly understand what it cost to run their programs, however. We expect to review their revised business plans when we are in Poland in November.

We worked together to develop a new promotional approach for the program while they were at OSU. We decided on a new name for the group as a whole, and each site. They chose to be called the **Polish-American Entrepreneurship Institute**. The target audience for promotional efforts will be business owners in the region, politicians in the region, potential business owners and university faculty members and teachers. The purpose established by the group was to develop a client base and to strengthen the image of the Institute in the region.

Strategies brain-stormed to support this promotional goal included the following:

- \* use of a common logo for all sites
- \* a common brochure with local inserts
- \* a common slogan used on all materials
- \* participation in conferences (i.e. ISBC in Warsaw)
- \* regular task force meetings
- \* use TV and radio in the local area
- \* sponsor call-in programs, offer free course to the winners
- \* make connections with regional broadcasters for regular interviews
- \* offer class scholarships via the Chamber of Commerce
- \* write articles for the newspaper about small business
- \* speak at local clubs for free
- \* use the project videos on local tv and interview some of the entrepreneurs
- \* put articles from other city projects in the newspaper
- \* establish a Century club with monthly meetings, important people as speakers, loan fund
- \* ask Washington Century Club to sponsor Polish clubs

- \* build satellite clubs in surrounding cities
- \* inform local government leaders about country-wide activities
- \* invite local politicians to be your guest at the Forum next year
- \* prepare special seminars for local politicians with focus on regional development
- \* print t-shirts for class members or Century Club
- \* set up competitive sports with TV staff, priests, other groups
- \* speak to high school and college students
- \* use students to assist with your research
- \* organize shows for foreign firms in your local area, invite key people
- \* organize tour to U.S. for Polish business owners

As a result of this planning activity, the Solidarity Economic Foundation developed the brochure and material packet found in Section 5.0 of this report. You will note that they have dropped the idea of "Polish-American" and are merely called the Entrepreneurship Institute (Instytut Przemysłowców).

At the end of their visit, the Polish coordinators were asked to give us an in-depth evaluation of their 3-week stay in the U.S. Although they seemed to enjoy the entire trip, the most useful part was the trip to see the SBDC's in New Mexico and there was nothing that they did not like. The detailed summary is in Section 5.0.

## **6.0 Develop Case Studies**

During this quarter, we finally received the finished case studies which they had decided to publish in book form. Under separate cover we will send you these with English translations.

We discussed the development of new case studies in Year II and decided that we would like to make them a bit more detailed and be sure they focus on new concepts. A meeting will be held with all Polish coordinators to identify responsibilities for the new case studies.

## **7.0 Develop Videos for Promotion**

Solidarity assures us that they are working on getting the videotapes from Year 1 used on national TV as they did some previous materials developed by OSU. To date, there has been no success with this. However, we have also encouraged the local coordinators to use the videos for promotion as was mentioned in the brainstorming list of promotional strategies.

The videos have been distributed to AID in Warsaw, the task force, and to the local coordinators for use in the program. They will also be very useful in the courses as well as for promotion of the program. Copies will be sent under separate cover after changing the format for U.S. vcr's.

## **8.0 Conduct Pilot Program**

The Export-Import Course has been selected for pilot use with business owners in Rzeszow while we are conducting the faculty training in November. It was chosen because it is a completely new course while the others have already been taught in the area. The pilot program is scheduled for Saturday, November 14.

## **9.0 Train Faculty**

During November, the 45 Polish faculty members from Poznan, Rzeszow, and Bialystok will participate in a series of workshops designed to update them on the revisions of the courses and orient them on the content of the new Export-Import course. The workshop will feature presentations by the U.S. consultant and the counterpart coordinator on the first day. On the second day they will have discussions among the faculty of how they taught the course and idea-sharing for future improvements. The schedule is as follows:

Nov 4-5	Entrepreneurship	Rash and Jurgilewicz
Nov 6-7	Consulting	Terminello and Kaszuba
Nov 9-10	Finance	Neeley and Plawgo
Nov 11-13	Export-Import	Cooper and Kaszuba
Nov 14	Export-Import Pilot	Cooper and Kaszuba
Nov 16-17	Marketing	Hills and Lach
Nov 18-19	Management	Gomolka and Goral
Nov 20-21	Strategic Planning	Rollinson and Krajewski
Nov 22	Coordinators' Meeting	ALL
Nov 23	Task Force Meeting	Warsaw

The training workshops are being hosted by the faculty in Rzeszow and will be held at the Marie-Curie University. Faculty will stay at the Rzeszow Hotel in the heart of the city.

## **10.0 Introduce Export-Import Course**

This task will be accomplished later in the year after the course has been promoted and the faculty has had time to develop their knowledge base in this area. The exact details will be planned at the meeting in November.

## **11.0 Arrange World Net Seminars**

Initial contacts have been made and there is interest in the possibilities. A letter will be sent outlining the project and requirements for the program to be scheduled in April, 1993.

## **12.0 Conduct Polish National Conference**

The second National Entrepreneurship Forum will be held in May in Gdynia, Poland

following the model of the first Forum held this year. Plans will be made with coordinators and faculty at the November meeting. The task force will also plan their involvement at their meeting in November.

## **SUMMARY**

During this quarter, we made plans for the entire year and moved forward in the development of the Institutes as a self-sufficient unit. A large number of changes are being made to the courses as well as the development of the course on Export-Import. Two of the Institutes moved into new quarters and the third has a very nice facility. One of the challenges will be to update the new faculty added as a result of about half of the faculty not working out or leaving for other jobs. We expect there will always be a need to change faculty because of the major changes happening in the area. And, all faculty are not suited to working with the practical needs of the entrepreneur. We consider this change an opportunity for the project because we will have a chance to impact on more faculty members. We hope the replacements will be available and able to handle the job.

## FINANCIAL REPORT

The CETE portion of the financial report was prepared by the Ohio State University Research Foundation (OSURF) and is found in Section 13.0. The budget expenditures reflect activities that include Year I and Year II because the second year has been considered an addition by OSURF. In summary, the CETE budget for the combined period is as follows:

Budget:	Year I		\$1,299,933
	Year II		977,198
	Total		\$2,277,131
Expenses:	Year I	First Quarter	356,040
		Second Quarter	351,314
		Third Quarter	354,155
		Fourth Quarter	398,733
	Year II	First Quarter	254,489
	Total		\$1,714,731
Balance:			\$562,400

The Solidarity subcontract report is as follows:

Income:	Year I		\$376,000
	Year II		282,000
	Total		\$658,000
Expenses:	Year I	First Quarter	30,513
		Second Quarter	68,860
		Third Quarter	155,171
		Fourth Quarter	110,456
	Year II	First Quarter	57,140
	Total		\$ 433,140
Balance:			\$224,860

- \* Develop new course on export-import
- \* Revise existing courses
- \* Define needed equipment for the sites
- \* Review business plans for each site
- \* Develop marketing strategy for the program
- \* Plan training program for faculty in November
- \* Plan process for translation of new materials
- \* Plan process for third party evaluations

#### **SEPTEMBER:**

- \* Work with U.S. consultants to complete changes in course materials
- \* Order new resources
- \* Obtain permission from AID to purchase equipment for sites
- \* Continue plans for November meeting
- \* Coordinate newly developed materials and translation
- \* Identify training plans of three sites
- \* Conduct interview with Voice of America
- \* Obtain copyright permission for new materials
- \* Communicate with Solidarity office
- \* Develop plans for 1993 Forum
- \* Plan task force meeting
- \* Identify appropriate program for potential World Net program
- \* Collect information for quarterly report
- \* Arrange meeting for development of Year II case studies

## **ENTREPRENEURSHIP INSTITUTES IN POLAND**

### **ACTIVITIES OF 5TH QUARTER**

#### **JULY:**

- \* Plan activities for Year II
- \* Visit new Institute offices in Poznan
- \* Meet with Bialystok coordinators
- \* Visit new offices in Rzeszow
- \* Participate in Rzeszow Century Club grand opening
- \* Meet with counterpart staff in Gdansk
- \* Meet with site coordinators and staff to plan future activities
- \* Plan visit to U.S.
- \* Arrange Polish coordinators' participation in AMA and Academy of Management Conferences in the U.S.
- \* Prepared subcontract with Solidarity and three institutes
- \* Review case studies and videos - Year I
- \* Plan new course on export-import
- \* Plan additions and changes to existing courses
- \* Visit AID office in Warsaw
- \* Translate new evaluation forms from third party evaluator
- \* Conference call with U.S. consultants

#### **AUGUST:**

- \* Submit quarter 4 report to AID
- \* Host Polish coordinators' visit to U.S.
- \* Identify needed resources for the sites

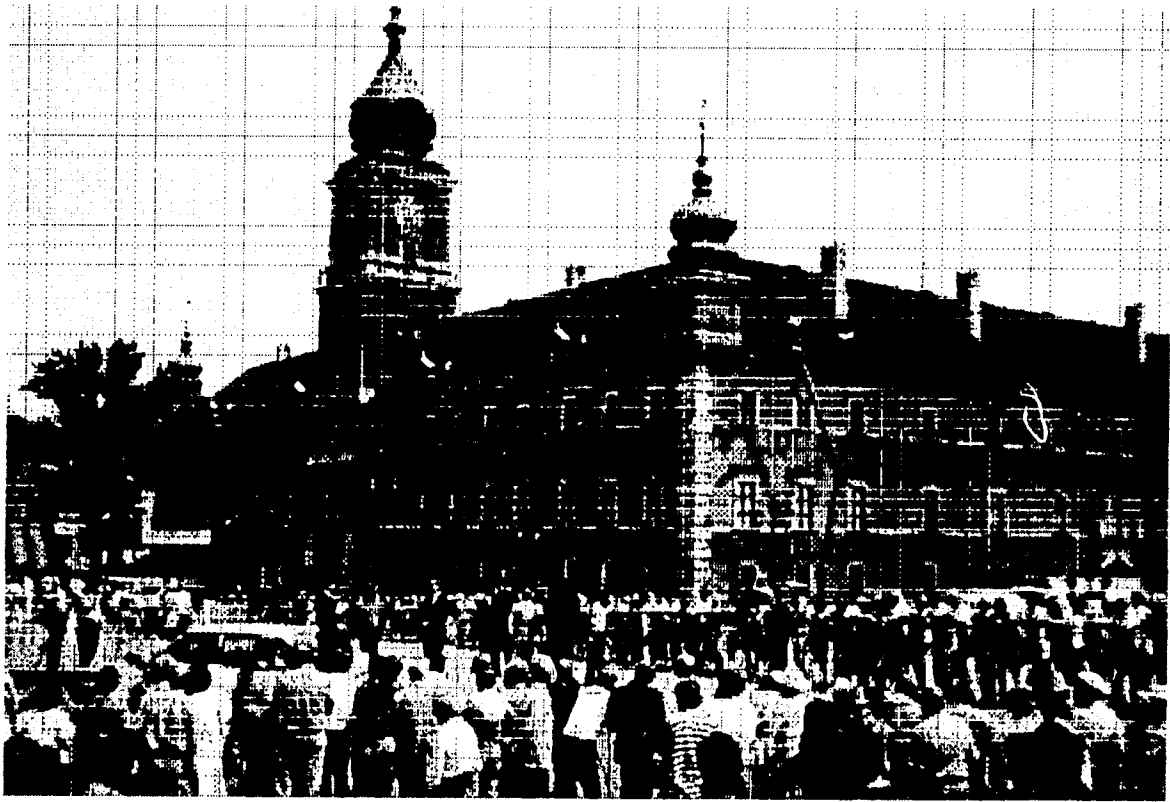




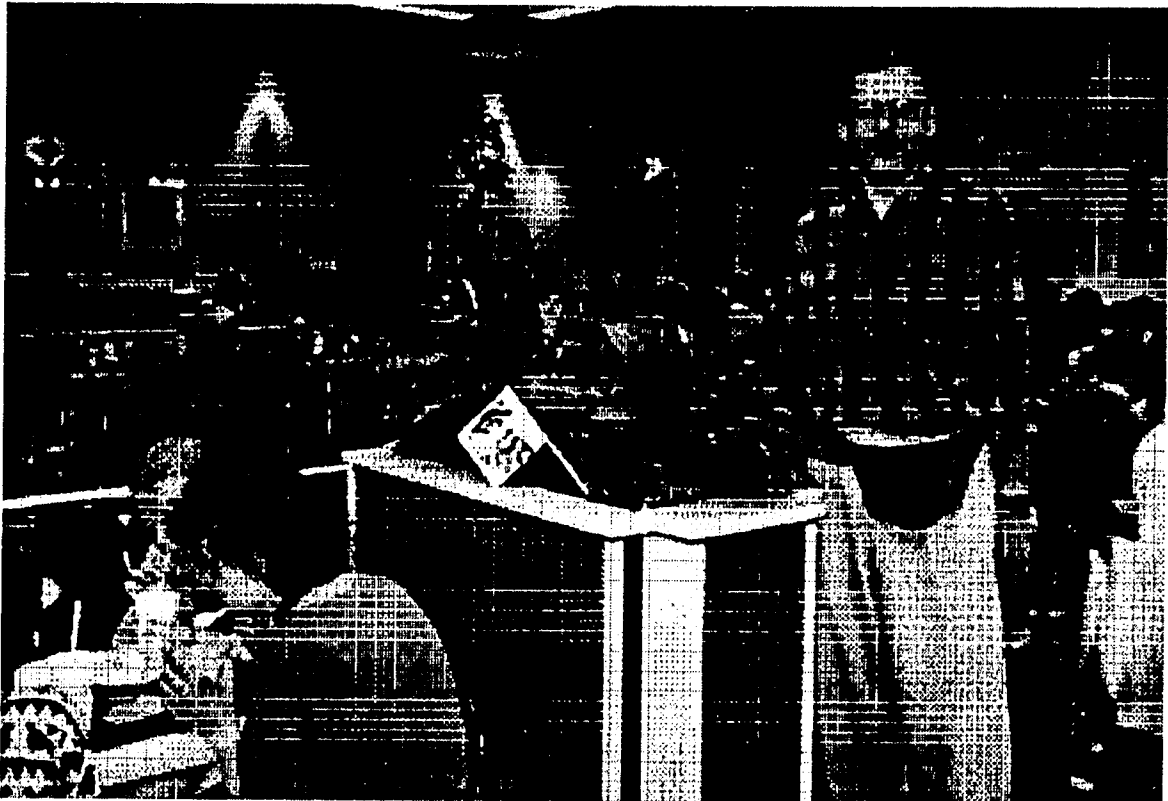
**APPENDIX**

**0.0**

**BACKGROUND**



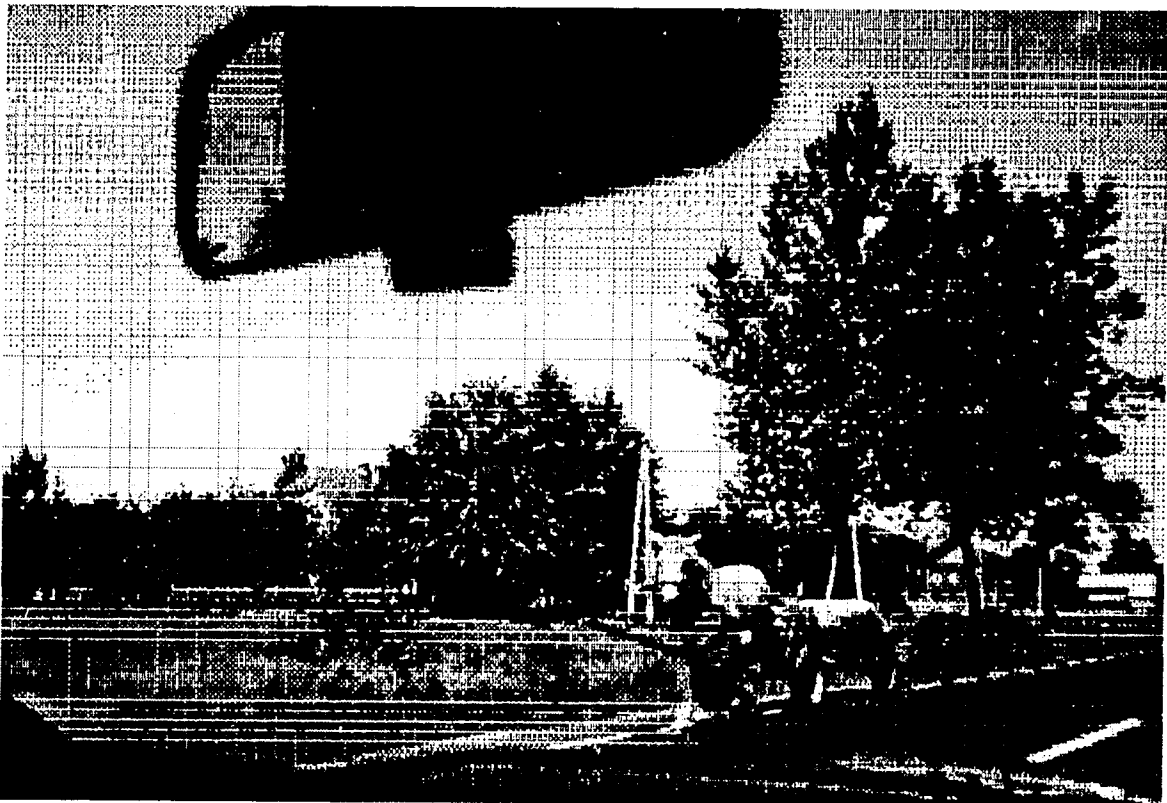
President Bush visits Warsaw



Korynski tries the new McDonald's in Warsaw



A typical Polish hotel room



Rural areas still use horses...a challenge to faster transportation vehicles on the road



New homes everywhere



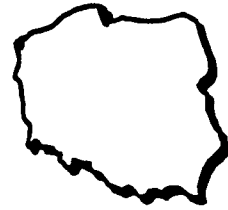
# Central European Small Business Enterprise Development Commission



Poland  
Czech and Slovak Federal Republic  
Hungary

---

Annual Report 1991



# POLAND

"The (Small Business Center) project is needed "yesterday."

— *Deputy Minister Bialowski*

"Assisting the development of the small business sector is probably the most important thing the U.S. Government can do for Poland at this time."

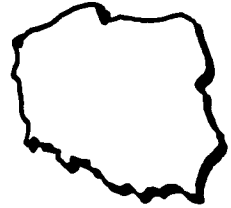
— *Senator Celinski*

## Poland



### Legend

- Potential Small Business Center Sites Evaluated by the Commission
- Small Business Center Sites Evaluated and Selected (1991)



## Poland Management and Technical Assistance Needs

### National Overview

Poland, a country of 37.9 million people, is in the midst of transition from a socialist, centrally-controlled economy to a market economy. The legislators and the citizens have taken some bold steps toward a market economy, negotiating a significant reduction to the government's debt, freeing prices to find their own level, and making the Polish zloty convertible.

Though Poland has taken giant strides toward democratization and the transition toward a market economy, some formidable obstacles remain. When the Commission began its initial work in Poland, the following conditions existed:

- *Unemployment:* Numbers of unemployed had reached nine percent, or nearly 1.6 million workers (August 1991).
- *State-Owned Enterprises:* There were approximately 8,000 state-owned enterprises in Poland. A significant percentage were heavily subsidized, over-staffed, lacking in skilled management, burdened with antiquated technology and practices, geared to markets in the Soviet Union and Central and Eastern Europe that no longer existed, and unable to compete in Western markets on the basis of either the price or quality of their products. Jeffrey Sachs, a key advisor to the Polish Government, described 100 to 200 large state-owned enterprises across Poland as "being in real trouble".
- *Infrastructure:* The telecommunications system, water and sewer systems and highway and road systems needed significant upgrading, and internal air connections were only marginally adequate.



## The Small Business Sector

### **U.S. Small Business Experience Offers Promise**

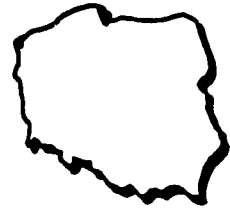
The small business sector in the United States traditionally accounts for more than 50 percent of those employed, and creates a significant percentage of all the new jobs in the economy. In 1989, small firms generated approximately 15,000 new jobs in manufacturing, while the large firms were losing 80,000.

In light of the great contribution a vibrant small business sector makes to the economy of the United States, it is easy to make a case that the development of small businesses is even more important to the transformation now taking place in Poland. The only other way to bring about any significant progress in Poland's effort to create a market-based economy is through the privatization and restructuring of the nearly 8,000 largely outdated, over-staffed, inertia-ridden, state-owned enterprises. In the near term, it is clear that the small business sector will have to provide the required impetus.

Evidence of the impact that the private sector in Poland can have was provided by *The Wall Street Journal* on July 29, 1991, when it reported that as much as 25 percent of Poland's industrial production may be in the private sector compared to only 8 percent two years ago. Private businesses are now handling at least 80 percent of all retail sales according to the *Journal's* reporter, quadrupling their share in less than 24 months. Of even greater importance is the capacity of private enterprise and small business to create new jobs at a time when unemployment is expected to rise to over 10 percent in the next year as many state-owned enterprises close down or are made more efficient by dismissing workers.

Reports from the Ministries of Industry and Ownership Changes put the number of new small businesses established in the last two years at nearly 500,000. Even if that number is exaggerated as most observers believe, it is awe-inspiring to see the proliferation of owners of new shops, kiosks, and other entrepreneurs in the streets of Warsaw and in cities and towns across Poland. The atmosphere is dynamic, but there is a large element of anxiety as the economy continues to deteriorate.

One role that small businesses have already begun playing in Poland is that of supplier to the state-owned enterprises that have lost their sources of supply. Previously, there was movement of parts and equipment within the



Soviet Bloc, often across international frontiers. With the breakdown of the old interdependent system, many of the larger industries were left without dependable suppliers and have been quick to turn to new, private, firms that have been established to fill the void.

Increasing numbers of entrepreneurs are trying to enter the market in Poland, and there is optimism about the potential rewards of private enterprise. However, the large numbers of new businesspersons face some fundamental obstacles:

- Many entrepreneurs are undercapitalized, and few have any concept of what the appropriate capitalization would be.
- The average small businessperson in Poland has little understanding of the risks of starting a new business, and experience with individual success or failure is uncommon.
- Private sector experience is rare, as is the availability of training and advisory assistance.
- More equitable tax laws and a simplified registration process require a change in the current policy and legal infrastructure.

## Survey Of Entrepreneurs

### Purpose

The Commission contracted a survey of small business owners and prospective entrepreneurs in Poland. The primary purpose of the survey was to determine if the managerial and technical needs of the business owners and entrepreneurs could be met effectively with an SBDC-type program.

### Methodology

The Commission designed the survey in consultation with academic experts in entrepreneurship. The questionnaire was discussed with, and translated by, Polish nationals who provided insight and sensitivity to local customs.

The comprehensive questionnaire was used in one-on-one interviews, administered in Poland by Polish-speaking Americans with small business experience, and by Polish nationals with strong ties to the private sector in Poland. Two of the Polish interviewers were active in the Polish Chambers of Commerce and conversant with developments in the business sector

25

throughout the country; a third was the President of the prestigious Gdansk Institute of Technology; the fourth was a co-owner of a private consulting firm and a professor at Lodz University.

The individuals interviewed were involved in manufacturing, trade and services firms, and represented small, mid-size and large firms.

### **Key Findings**

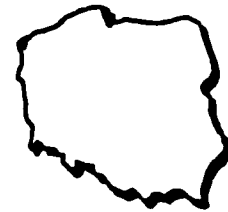
The research data indicate that owners of small and mid-size firms in Poland are interested in the seminars and services envisaged for Small Business Centers.

- *Need for SBDC-Type Programs:* Polish entrepreneurs interviewed believe there is an urgent need for the kinds of assistance provided by SBDCs. A significant percentage of those interviewed said they would personally take advantage of the opportunity to participate in Small Business Center programs if the Centers were established within a reasonable distance from their businesses.
- *Interest in Seminars and Courses:* Respondents indicated considerable interest in participating in a range of seminars and courses. Figure 1 presents topics of prime interest to those involved in small and mid-size businesses.

**Figure 1: Entrepreneurs In Poland—Top Eight Business-Oriented Seminars Selected**

---

- Advertising and Promotion
- Risk Management and Insurance
- Capital Planning
- Financial Management/credit and Collection
- Salesmanship
- Taxes for Small Business
- Business Law for Small Businesses
- Credit and Collection



■ *Interest in SBDC-Type Services:* Respondents also indicated their interest in a range of services that could be offered by the Small Business Centers through courses and individual counseling. Figure 2 presents the percentage of those interviewed who expressed interest in particular services.

**Figure 2: Entrepreneurs In Poland— Top Eleven Anticipated Small Business Center Services Selected**

- 
- |                           |                                   |
|---------------------------|-----------------------------------|
| ■ Continuing Education    | ■ Advertising Planning            |
| ■ Marketing               | ■ Employee or Managerial Training |
| ■ International Marketing | ■ Increasing Local Sales          |
| ■ Strategic Planning      | ■ Business Skill Assessment       |
| ■ Loan Packaging          | ■ Business Law Information        |
| ■ Business Counseling     |                                   |

### **Application Of SBDC Programs**

In Poland, aspiring entrepreneurs rarely have experience in the private sector, and know only what they have heard, usually from foreign sources. Unlike the United States, where the universities and community colleges give courses that provide at least a nominal understanding of the elements involved in doing business, there is little or no cross-fertilization between commercial enterprises and academia. Also, in Poland there is nothing to compare with the extensive body of literature available to the American businessperson through the Small Business Administration, the SBDCs and other organizations.

Recognizing that the environment for small business development in Poland is different from what it is in the United States, the Commission examined the applicability of SBDC courses and services in Poland. The Commission reviewed services offered at nine SBDCs in seven states in the United States. They also examined management and operational considerations for Poland.

### **Specific Programs**

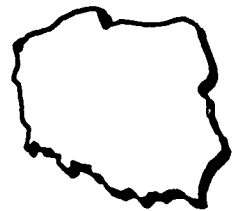
A broad array of basic SBDC programs — accounting, bookkeeping, inventory control, and personnel management — are appropriate for use in Poland. With translation and some modification for local usage, many of the programs can be introduced to small business owners and prospective entrepreneurs.

Recommended core courses, seminars and services include:

- How to start and organize a small business;
- How to prepare a business plan to present to a partner, a bank, or other lenders;
- How to assess the market for the products or services to be offered;
- How to develop and control inventory;
- How to establish contact with foreign investors and gain access to foreign markets and technology;
- How to negotiate a joint venture or licensing contract;
- How to gain access to information necessary to resolve the problems being addressed, or to identify new technology; and
- How to obtain credit and venture capital, and establish creditworthiness without adequate collateral.

Other subjects are of particular relevance to Poland:

- Entrepreneurship: How to start a business;
- Cooperation: How to support the efforts of others while helping yourself (teaching the win/win concept);
- How to privatize a small, formerly state-owned enterprise effectively;
- How to privatize a segment of a dismantled state-owned enterprise; and
- How to motivate employees.



Several SBDC programs in the United States have relevant expertise. Training programs on international trade such as those in Wisconsin, and the Specialized Procurement Assistance Program in Florida are of special interest in Poland. Several SBDCs are equipped to address particular economic sectors, such as agriculture, textile manufacturing, or international trade, and to help in developing sectoral programs based on regional needs.

Additional approaches that could be introduced in Poland are:

- Involve graduate students engaged in managerial coursework in consulting teams to help students and professors learn the realities of small business.
- Use the media to encourage and instruct in entrepreneurship, focusing on the activities and accomplishments of small businesses to publicize success.
- Encourage schools at all levels to engage in teaching entrepreneurship by, for example, training teachers and implementing Junior Achievement, or similar programs.
- Assist in starting an association of small business professionals (advisory center staff, consultants, professors and government economic development specialists) to encourage networking and learning from each other.

## Potential Host Sites

### The Evaluation Process

Given the need for, and suitability of, SBDC-type programs in Poland, the Commission identified and evaluated Polish organizations, institutions and sites that could best host Small Business Centers.

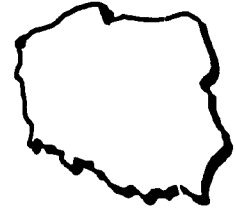
In consultation with senior Polish government officials, the Commission investigated sponsorship options, including consortia of organizations that are currently cooperating to promote entrepreneurship. These consortia exist in various regions of Poland. They include business organizations and academic institutions concerned about their city's welfare. Such consortia provide the most appropriate sponsorship for Small Business Centers in Poland.

As part of the assessment of potential host organizations and institutions, the Commission carefully weighed the capacity of sponsoring consortia to contribute support for the Centers. Though budgets of government ministries are being drastically cut and resources are limited in most cities, the Commission was impressed by the efforts of some groups to identify in-kind contributions to fulfill their sponsorship commitment for a Small Business Center. Ongoing evaluation will be required to ensure the capability of local hosts to provide operational and administrative support on a long-term basis once the U.S. financial assistance for this project ceases.

The Commission also sought the guidance of senior Polish government officials to determine which cities would be best suited to host Small Business Centers. The Deputy Minister for Industry and Plenipotentiary for Business Promotion identified a number of cities which were priorities for assistance because of high and escalating unemployment. He further acknowledged the necessity of placing the Small Business Centers in larger cities, but urged that provision be made to assist smaller communities as well.

### **Criteria Used in Assessing the Attractiveness of a City For the Location of a Small Business Center**

- The level of political interest in, and support for, having a Center located in a particular city (as opposed to having a particular institution serve as the sponsor);
- The willingness of the institutions and organizations in an area to cooperate in the establishment and support of a Center;
- The proximity of the site being considered to other locations that could be served as sub-centers; and
- The status of the local and regional economy, especially the current rate of unemployment and the projections for the coming six months to a year.



**Criteria Used in Assessing the Collective Potential of Candidate Institutions and Organizations (Consortia) to Serve as Hosts to the Small Business Centers**

- The commitment of leading officials in the consortia or institution to accept such a role, and the overall attitude of their staffs;
- The compatibility of the purposes of the Small Business Centers with the mission of the consortia or institution being evaluated;
- The nature and extent of any prior history of activity by or within the consortia or institution in support of small business activities;
- The support of business and political leaders in the city and region for the placement of a Center with the consortia or institution being considered;
- The willingness and capacity of the consortia or institution to provide matching funds or in-kind contributions to the establishment and operation of the Center;
- The availability of space for the Center and its related activities within the consortia or institution;
- The history of the consortia or institution, the base of its support, and its potential for long term sponsorship;
- The potential for providing staff for the Center from its own faculty or the staffs of its members;
- The presence of an individual who could be appointed as the consortia or institution's lead person to work with the Center; and
- The consortia or institution's vision of the Center and its mission, how the Center would be developed and supported.



### **Site Selection**

Commission representatives identified and evaluated eight potential sites for Small Business Centers in Poland: Lodz, Warsaw, Gdansk, Poznan, Cracow, Lublin, Plock, and Kielce. The Commission selected Lodz, Warsaw and Gdansk as the locations for establishment of Small Business Center demonstration programs in Poland.

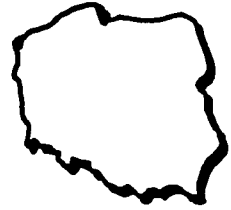
#### **Lodz**

Lodz is the second largest city in Poland, closely tied to the textile industry since World War II. With a population of nearly one million settled over a number of townships and outlying areas, Lodz has been the primary source of textiles for much of the Communist bloc. Its mills have employed nearly 55 percent of the workers in the region as they produced in response to quotas handed down from the government ministries in Warsaw.

With the closing of the Soviet markets to Lodz's products and their inability to compete in any other, the mills have begun to close their doors, or splinter into smaller, more workable entities. Unemployment that has already risen to nearly 75,000 could easily double over the next several months when additional mills are shut down.

The rationale for the selection of Lodz as a site for a Small Business Center is as follows:

- Interest throughout the region in the establishment of the Center is very high.
- There is significant unemployment throughout the region and it is expected to increase sharply over the next six months to a year.
- There is a strong commitment to the development of small business in the region and the streets are full of new enterprises.
- Those organizing the economic revival program in Lodz have identified the needs, arranged for highly competent management of their programs, enlisted the support of other foreign groups (the Know-How Fund), and are already seeking to help themselves.
- Participating institutions are strong, and broad political support exists at local and national levels.



- Problems are well understood and strong provision exists for addressing them.
- Although it was only recently established, the Foundation for the Promotion of Entrepreneurship appears to be sound and viable.
- The Foundation has strong representation from both the academic (Lodz University has two members on the Foundation's Board of Directors) and private sectors. One of the prime movers in the Foundation is a professor at the university.
- A qualified director of the Foundation is in place and additional staff is being hired.
- The Foundation is already establishing excellent facilities and is sponsoring small business training. Thus, it offers the probability of quick return on the initial investment and some insight into the value of beginning operations with a well-equipped host institution.

#### **Warsaw**

As Poland's largest city, Warsaw is one of the country's most important engines for economic development. By establishing a Small Business Center in Warsaw, numerous small businesses located in the region could receive training, counseling, and encouragement.

The Commission selected a consortium of sponsors, headed by the Polish National Chamber of Commerce and in association with the Polytechnic University of Warsaw and the High Pressure Laboratories of the National Academy of Sciences. Other academic institutions, particularly the Warsaw School of Economics, could also provide resources for the Center.

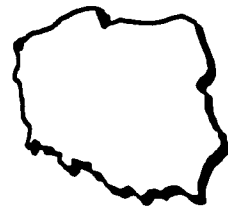
The rationale for the selection of Warsaw as a site for a Small Business Center is as follows:

- Warsaw is the largest city in Poland and the home of significant numbers of small businesses.
- The Center would be advantageously located in the heart of Warsaw, with ready access to many surrounding communities and towns by train.

- The Mayor of Warsaw strongly supported the establishment of a Center in Warsaw.
- The Polish National Chamber of Commerce is committed to the concept of the Center and has made a major effort to coordinate support and make facilities available.
- The Polish Chamber of Commerce has offered to provide space, some furnishings for offices and classrooms and some volunteer staff for the Center. It has a limited, but growing, reference library. The Polytechnic has agreed to provide space and has offered the participation of senior students in training and counseling sessions.
- The President of The Polish National Chamber of Commerce, who is also a member of the Warsaw City Council, is a strong advocate for the Center and will be a key person in its direction and operations.
- Strong academic support is available from local institutions, with the Polytechnic being a committed partner in the enterprise.
- The High Pressure Laboratories have already created five small businesses, and are currently developing an incubator for high-tech start-ups. Its staff can assist in matters concerning the start-up of new enterprises.
- The Rector of the Warsaw School of Economics signaled the commencement of several new initiatives in management, marketing and business administration which could be a resource for the Center.

### **Gdansk**

Gdansk was selected by the Commission as a site for a Small Business Center primarily on the basis of the excellence of its proposed sponsor, its major and mounting unemployment problems, and the city's status as the home of Solidarity. The Gdansk Institute of Technology, in cooperation with the Regional Development Agency and other organizations in the region, will form the core sponsorship for the Center. Most organizations in the community concerned with assisting the small business sector expressed willingness to cooperate with the Gdansk Institute and the Regional Development Agency.



Other reasons for the selection of Gdansk as a site for a Small Business Center are as follows:

- Unemployment in the area is the third highest in the country.
- The key political and academic officials in the region are supportive of the Center concept and the leadership of Gdansk Institute of Technology and the Regional Development Agency group.
- The President of Gdansk Institute of Technology is the head of the Nine University Commission of Gdansk which is concerned with matters of interest to the region's educational institutions, and promises support. The President is also the primary advocate for the Center, and a leading figure in the region's efforts to strengthen coordination and cooperation among the academic institutions and community organizations.
- Gdansk Institute of Technology has an incubator program that has experience helping new businesses. The Director of this program would be able to assist with the start-up of the Center.
- Ample facilities for offices and classrooms, plus computer facilities, have been offered by prospective sponsors.
- Staff from the various institutions and organizations in the area would be available to serve as counselors on a volunteer basis. In addition, some support would be provided by senior students and staff in the universities.

---

# **POLAND: GENDER ISSUES IN THE TRANSITION TO A MARKET ECONOMY**

---

**DRAFT REPORT  
FOR REVIEW AND COMMENT**

*Bureau for Private Enterprise*

*Prepared for:*                      *Office of Women In Development  
Bureau for Research & Development  
Agency for International Development*

*Prepared by:*                      *Coopers & Lybrand*

*Sponsored by:*                      *Private Enterprise Development Support Project II  
Project Number 940-2028.03  
Prime Contractor: Coopers & Lybrand*

*July 1991*

## CHAPTER IV

### PRIVATE SECTOR DEVELOPMENT FROM A GENDER PERSPECTIVE

For over forty years, large state-owned enterprises dominated virtually all sectors of the Polish economy but agriculture. Private enterprise was permitted to exist under communism, but was severely restricted in terms of its size and the range of its activities. The major economic reforms of the past two years have opened the door for private initiative, and new businesses have emerged with striking rapidity. But the transition to a market-based economy will take many years, and in the interim, there will no doubt be considerable flux and uncertainty.

Among the many unknowns is the role women entrepreneurs will play in Poland's budding private sector. While there has been considerable research conducted on gender issues in the labor force, few institutions or individuals have considered gender issues in the development of Poland's private sector. This is in part due to the fact that private enterprise is such a new phenomenon. However, it also reflects a view held by many businesspeople in Poland that gender is not an issue; many businesspeople note that men and women face the same opportunities and constraints in developing new enterprises.

In order to take a first cut at the question of gender and private sector development, the team conducted interviews with twelve women in business in a variety of sectors: agri-business, retail sales, textiles, and business services. A description of many of these women and their businesses is included in Annex 3 of the report. The team also interviewed representatives from five banks and five associations that support business development. Based on the information gathered in these interviews, the team would agree that there are no major legal or structural impediments specific to women in business. Indeed, the problems faced by many new businesses — whether they are owned by men or women — are often so overwhelming that gender-related impediments pale in comparison.

But this is not to say that gender is not an issue. According to bankers and the leaders of businesses associations, no more than 20 to 25 percent of the newly created private firms are women-owned or managed. There are also significant differences between the types of enterprises owned by men and women, as well as their participation in credit programs, business training programs and business associations. Moreover, because women are likely to be disproportionately laid off as a result of economic restructuring, it is critical to assess the extent to which private sector development can offer viable alternatives. These are some of the key issues to be examined in this chapter.

## A. THE PROFILE OF WOMEN ENTREPRENEURS

While men and women entrepreneurs share many attributes, three key differences were pointed out in our interviews: (i) age; (ii) motives for creating an enterprise; and (iii) the sectors in which men and women create new businesses.

### 1. Age

Most women in business in Poland are at least 35 to 40 years old. Age is a critical factor for women entrepreneurs because of their responsibilities in caring for children and the home. Indeed, nearly all of the businesswomen interviewed by the team noted that they would have been unable to start their businesses earlier — even if the opportunity had been available — because of the need to spend time at home raising children. With their children now grown, they can afford to devote the long hours required to start a new business. Age also comes into play in terms of access to credit. Banks note that they are usually unwilling to lend to either men or women below the age of 35 because of their lack of work experience.

### 2. Motives for Creating an Enterprise

The fear of losing a job or actual loss of employment is often the key factor motivating women to start an enterprise. Faced with the prospect of long-term unemployment, women find that starting a new enterprise may be their only alternative to generating income. The businesses they create are not necessarily informal sector types of businesses — as one might anticipate in many developing economies undergoing major structural change — but include a broad range of formal and informal sector businesses. For example, one businesswoman interviewed by the team bought out a recently privatized pharmacy where she had been an employee for years. She is certain that, had she not purchased the pharmacy, she would be facing unemployment with few alternatives for finding a new job. Privatization opened the opportunity; however, fear of losing her job was the primary impetus for starting her own business.

### 3. Business Sectors

According to the banks interviewed by the team, there is a clear distinction between the types of businesses owned by women and men. Women-owned businesses are most often found in commerce, trade and service-oriented sectors. In contrast, businesses created by men tend to be concentrated in production. These types of patterns are similar to those found in most developed and developing economies. What is surprising, however, is that these patterns have emerged so quickly in Poland, where the private sector is essentially starting anew.

Within these broad sectors, the banks identified specific sub-sectors in which their clients tend to start businesses. Again, there were significant differences between the types of businesses initiated by men and women. Some of the key sub-sectors in which men are starting new businesses are:

- ◆ construction and housing development
- ◆ building services, such as electricity or renovation
- ◆ transportation
- ◆ production of plastics and other man-made materials
- ◆ food processing, particularly meat processing and packaging

In contrast, the key sub-sectors in which women are starting new businesses include the following:

- ◆ textiles and clothing
- ◆ pharmacies
- ◆ agri-business
- ◆ service-related businesses including restaurants, hotels and business services

Each of the sub-sectors in which women are active is examined below.

**Textiles and Clothing:** As noted in the previous chapter, textile and clothing production is facing gloomy prospects in Poland. Cheap imports from Asia have flooded the domestic market, and with the decline of the Soviet market, there are few opportunities for exporting Polish goods. In fact, textile and clothing production is the one area where most banks have decided to stop lending all together. As women begin to lose their jobs in textiles, they have begun to open small sewing businesses, often on an informal basis. Clearly, such enterprises will be unable to absorb the numbers of women to be laid off in the textile and clothing industries over the next year. Nonetheless, the demand for the services of these small businesses – such as tailoring and mending – seems to be increasing, as the decline in purchasing power squeezes consumers' ability to buy new clothes. In sum, while production-oriented enterprises will decline precipitously over the next year, service-oriented microenterprises are likely to grow.

Another phenomenon that has emerged during the past two years has been the creation of many new clothing boutiques – and virtually all of these businesses are women-owned. The prospects for these businesses appear to be mixed, however, depending on their market niche. Surprisingly, those that cater to the upper end of the market will probably do best in the transition period. Not only are these stores less affected by the decline in purchasing power, but rarely do they have to confront the stiff competition that has emerged from informal traders. In contrast, retail stores that cater to the lower or middle end of the market are losing their customers to informal traders and are upset that no regulations have been established to control this flourishing industry. Trends in the clothing industry are further illustrated by the following case profile of an entrepreneur interviewed by the team.



b. Lodz Chamber of Commerce and Industry

The Lodz Chamber of Commerce and Industry was created one year ago in order to serve as a source of information for new business development in the region. Its orientation toward providing services to members is completely new in Poland — yet desperately needed. Thus far, the chamber has created a data-bank of information on all of its members. The chamber has 400 members, ranging from small private firms to large state-owned enterprises. The data-base includes all kinds of information on each of the firms; however, because gender is not one of the variables included in the system, the chamber had no idea how many of their members are women. The chamber estimated that less than 12 percent of their members are women.

c. Industry Associations

In contrast to the relatively low rates of female participation described above, a number of the newly established professional associations do have significant numbers of women in their membership. The association of retailers in Warsaw has over 500 members, most of whom are women. The association of pharmacists has close to 100 members, 70 percent of whom are women. Most of the women in business that we interviewed noted that they would be eager to join a business association, as long as they could see some clear benefits from doing so.

The needs of women in business are no different than those of men. But their involvement in programs which are important to creating new businesses in Poland is different. As illustrated in this chapter, women make up a much smaller portion of the participants in the newly created business education and training programs; they comprise a very small number of the members of the newly-created business associations; and women-owned businesses comprise only 15 to 30 percent of the loan portfolios of most banks. In an effort to integrate women in the business community, it will be important to encourage women's involvement in programs that provide valuable services. It will also be critical to create an institutional infrastructure which is conducive to women's participation in the business community. A number of institutional issues have an important bearing on women's participation in the labor force and the business community. These issues are examined in the next chapter.

## **A. SUMMARY OF FINDINGS AND CONCLUSIONS**

The findings and conclusions of the literature review and the field work in Poland are as follows:

### **◆ UNEMPLOYMENT**

An important hypothesis emerging from the literature review was that women would be disproportionately unemployed as a result of economic reform in Central and Eastern Europe. While this trend was reported in a number of academic papers, there was virtually no supporting data. Some researchers also expressed concern that re-employment would be a problem facing women in the near future.

Poland has been collecting data on unemployment since January 1990. As described in Chapter III, the number of unemployed women has grown more rapidly than the number of unemployed men in every month since January 1990. Women now make up more than 52 percent of the unemployed, whereas they comprise 45 percent of the labor force. Labor analysts interviewed by the team believe that the gender gap in unemployment has only begun to emerge. As textile, clothing and electro-mechanical firms begin to close their doors, unemployment among women is likely to surge.

One factor which helps to account for the growing disparity between the numbers of unemployed men and women is that the Polish labor market — as most other labor markets — is highly segregated by gender. Women have traditionally made up the majority of employees in the textile and clothing industries, as well as electro-mechanical industries. They were also heavily employed in clerical and administrative jobs to meet the bureaucratic requirements of a centrally-planned economy. In the transition to a market economy, the number of jobs in these areas is falling dramatically. Women are losing their jobs and have few alternatives for new employment.

The data indicate a considerable gender gap in re-employment in Poland. Only 23 percent of the job openings on file with the Office of Work are for women; 77 percent are for men. But it is also important to recognize that measures of re-employment in Poland are generally weak. The only indicators of re-employment the team could identify were the numbers of "job orders" received by the Office of Work. To use these data as accurate measures of re-employment, one would have to assume that all of the unemployed go through the Office of Work to obtain jobs, and that the Office of Work can successfully fill the job orders it receives. These are no doubt faulty assumptions. Moreover, as the private sector grows — particularly in terms of new job creation — such measures of re-employment will grow increasingly obsolete. New measures of employment are urgently required to reflect the growing importance of the private sector in Poland's economy.

## ◆ **LABOR LAW AND SOCIAL BENEFITS**

According to the literature, many of the Eastern Europe nations are beginning to retract some of the generous benefits that were extended to mothers and families under socialist rule. Moreover, as maternity leaves, child-care allowances, and free day care are withdrawn, women may be forced to quit their jobs to care for the children.

The future of labor law and social benefits is not nearly as cut and dry in Poland. The team found that there is very little movement toward changing the laws at this point in time. Indeed, the laws governing maternity and child-care benefits are considered virtually "untouchable" because any changes would be too sensitive. Nonetheless, Poland's emerging private sector questions how these generous benefits can be maintained in the context of a market economy. Is it really feasible for a small company to grant an employee a three year leave for child-care? In light of the increased emphasis on private sector development, the team believes that a gap may well emerge between labor law and its practice. Labor law may eventually change in response to the changes in practice in the business community, but not in the near future.

The situation regarding day care is stark in Poland. Day care centers are closing rapidly because of the lack of financial resources to provide fully-subsidized care. In addition, recent increases in unemployment among women have lessened the demand for day care facilities. Nonetheless, the team found no data to indicate that women might be quitting their jobs in order to care for their children. To the contrary, most women are desperately holding on to their jobs in order to have sufficient resources to care for their children. Few women can afford to make the choice to quit their jobs. They manage to find alternatives to the state subsidized day care, most often asking a grandmother or another family member to care for the children. Unfortunately, the high cost of private day care makes it an unacceptable alternative for most Polish women.

## ◆ **FLEXIBILITY IN THE WORKPLACE**

According to the literature on gender issues in Eastern Europe, labor markets were highly rigid under socialism, offering few opportunities for part-time work or other flexible work options. With advent of economic reform, the literature pointed to the fact that opportunities for part-time work, job-sharing and other flexible employment options were beginning to surface in some of the countries of Central and Eastern Europe.

Unfortunately, in Poland, opportunities for increased flexibility in the workplace have not emerged. In fact, the opportunities for part-time work are declining and, as state-owned companies restructure their operations, part-time employees are often the first to lose their jobs. Moreover, most women still need to have the income generated by full-time employment to support their families. Part-time work and other flexible employment options may be the wave of the future, but for now, they are barely a consideration.

## ◆ *PRIVATE SECTOR DEVELOPMENT*

Because private sector development is such a new phenomenon in Poland, the literature contained little data or information. In carrying out the field research, the team found that few institutions or individuals are looking at gender issues in the development of Poland's private sector. Most research tends to focus on gender issues in the labor force. Given the importance of private sector development to Poland's future, this is an area where additional data is needed.

Based on the team's interviews with a number of Polish women in business, as well as representatives of banks and private sector support organizations, the team found that there were no major legal or structural impediments specific to women in business. As described in Chapter IV, the problems faced by many new businesses, whether they are owned by men or women, are often so overwhelming that gender-related impediments pale in comparison. Credit and lack of business skills are major constraints for both men and women in business.

Nonetheless, this is not to say that gender is not an issue. There are major differences in the types of businesses owned by men and women. Moreover, women make up a much smaller portion of the participants in the newly-created business education and training programs; they comprise a small number of the members of newly-created business associations; and women-owned businesses comprise only 15 to 30 percent of the loan portfolios of most banks. In sum, women are not major players in the institutional network which supports private sector development.

## ◆ *POLITICAL PARTICIPATION*

The literature review highlighted the fact that women's representation in legislative bodies has dropped precipitously since the elections of 1990. As discussed in Chapter IV, the situation is no different in Poland (although the drop in female participation was not as sharp in Poland as in other countries). Previously, women comprised 20 percent of the seats in the Polish Parliament; as of July, they held 12 percent of the seats. It will be interesting to see what changes will emerge once fully-free elections are held in October 1991.

Despite the drop in representation, the results of both the literature review and the field research indicate that women's voice in parliament may not have changed significantly. Under socialism, women were essentially figureheads in the system, chosen solely because of their party loyalty. They did not necessarily represent women's views. Now, the few women who are members of the Parliament play a very active and significant role. Moreover, many of them do attempt to address the concerns of Polish women in Parliament.

## ◆ INSTITUTIONS REPRESENTING WOMEN'S CONCERNS

One of the hypotheses emerging from the literature review was that open political systems would create an opportunity for new women's organizations to grow. This has certainly been the case in Poland, where there has been a proliferation of small associations created since 1989. Many of these associations have been created in response to the potential loss of abortion rights. But now that the abortion debate has quieted down for the time being, these associations are beginning to focus on women's roles in the new political and economic framework. While most of these new associations are fledgling institutions, their mere creation is a positive sign. They offer Polish women an opportunity to have a voice in the process of political and economic reform.

## ◆ ATTITUDES TOWARD WORK AND HOME

According to the literature, one of the legacies of socialism was a sense of disillusionment among many women with working. Maria Lado, one of Hungary's leading industrial labor analysts, stated in a recent paper that "even in the 1980s a great number of women (mainly those in industrial jobs) consider their paid employment as only a necessary evil. Their orientation to paid work often was rather instrumental: work meant only a means in the daily struggle to make ends meet." (Lado, 1991, p. 8). Swasti Mitter, a researcher at the Brighton Business School in the United Kingdom, contends that many East Central European women are accepting unemployment for the time being, looking forward to the opportunity to spend more time with their children (Mitter, 1991, p. 17).

In the case of Poland, there is no doubt that women shoulder a heavy double-burden. Not only do they hold full-time jobs in the workplace, but they are also responsible for nearly all of the child-care and household work. According to some of the women interviewed by the team, there have been some changes in the sharing of home responsibilities among young couples. The fact that food and other basic necessities are more readily available has also mitigated the impact of the double burden on women in Poland.

The team found no evidence to support the contention that women are willing to accept unemployment in the near term. For most women, there is no choice about the need to work, and in the face of unemployment, women desperately continue to search for new jobs. Their income is crucial to the family budget, and they can ill afford to take time out to care for the children. With constant increases in the cost of living, the need to work grows ever stronger.

In summary, the data gathered through field research confirmed some of the findings of the literature review, particularly in the area of unemployment trends. On the other hand, the field research also highlighted areas where Poland is different from other Eastern European countries. Field research will be conducted in Hungary in September/October 1991. The results of the work in Poland and Hungary will be summarized and compared in a document to be prepared in November 1991.

# Poland's path right, Bush says

THE ASSOCIATED PRESS

WARSAW — President Bush told tens of thousands of cheering Poles on Sunday that “reaching your dreams will be difficult,” but he urged them to persevere in the economic and political reforms that have transformed their nation.

“Make no mistake, the path you have chosen is the right path,” Bush told an overflow crowd in 350-year-old Castle Square.

Bush backed his message of hope with a proposal to convert a \$1 billion fund that has helped stabilize Poland's currency to such new uses as establishing a modern banking system. But Poland first would have to meet reforms demanded by the International Monetary Fund.

A \$200 million U.S. grant made in 1989 but not yet used would be carried over, and Britain, France, Germany, Canada and other nations would provide the rest in grants or loans.

So far, the United States has provided Poland with about \$4 billion in assistance, including \$2.6 billion in debt forgiveness.

The president said he would take the proposal to the seven-nation economic summit in Munich, Germany, where he traveled after his brief, symbolic Polish visit. Bush also announced a \$10 million housing aid package to implement previously announced programs.

## UPCOMING EVENTS

August 10-28

**NAVIGATING THE INTERNET AND INTERACTIVE WORKSHOP** for new or infrequent users who want to know more. Contact: Judy Wanger

August 17-21

**AGENCY FOR INTERNATIONAL DEVELOPMENT (AID) TRAINING WORKSHOP**, N/S Auditorium, 8:00-5:00 pm. Contact: Cathy Ashmore/Rod Terminello (See related article.)

August 17&18

**VOCATIONAL INSTRUCTIONAL MATERIALS LABORATORY (VIML)** will be exhibiting products at the All Ohio Vocational Education Conference at the Columbus Convention Center---double booth, #'s 201 & 300. CETE staff attending the conference are invited to stop by.

August 24-28

**DACUM TRAINING INSTITUTE**, Portland Community College, Portland, OR. Contact: Bob Norton

August 31

**LOUISE VETTER & CHERYL LOWRY ON WOSU-AM RADIO CALL-IN TALK SHOW, "Open Line"**, Monday, 1:30 -2:30, hosted by Tom Wiebell. (See related article.)

September 7

**LABOR DAY HOLIDAY**, offices closed and no classes

September 8

**RETURN TO 8:00 - 5:00 OFFICE HOURS**

## WELCOME, AID COORDINATORS

Eight coordinators from Poland will be visiting the Center and working on revising and developing new curriculum for the U.S. Agency for International Development (AID) Project which is the Entrepreneurship Education Institute. They will arrive on Friday for a meeting in the Conference Center and begin their week long workshop on Monday, August 17 through Friday August 21.

# Bush, in Warsaw, Rallies Poles in 'Time of Trial'

## He Declares 'America Stands With You' And Assures Nation It Is on 'Right Path'

By Don Oberdorfer  
and Mary Battiata

Washington Post Service

WARSAW — Nearly three years after Poland threw off the shackles of communism, igniting a revolution in Eastern Europe, President George Bush returned Sunday to celebrate its "new birth of freedom" and declared, "America stands with you."

Speaking in the cobblestone square of Warsaw's historic Old Town with President Lech Walesa at his side, Mr. Bush sought to console Poles, for whom freedom has also meant a fivefold increase in retail prices, a sharp rise in unemployment and the breakup of the anti-Communist Solidarity movement into squabbling factions that have produced a political deadlock.

Conceding that there has been "more pain than progress" for many people, Mr. Bush argued that "Poland's time of trial is not caused by private enterprise but by the stubborn legacy of four decades of Communist misrule."

"Make no mistake," he said. "The path you have chosen is the right path."

Poles turned out in large numbers to greet the president warmly, but without the fervor that marked his earlier trip, in September 1987, when Mr. Bush, then vice president, spoke out for the cause of the still-banned Solidarity movement, or his July 1989 visit, when he urged the Communist government to make its peace with the resurgent Solidarity, which had just won its first national elections.

When Solidarity was permitted to take over the Polish government the following month and

Moscow did not intervene to stop it, one after another of the Soviet Union's East European allies ousted their Communist rulers and turned toward the West.

In revisiting the place "where the revolution began," as Mr. Bush termed it, the U.S. president brought a message of reassurance and hope at a time when euphoria has given way to reality of severe economic and political problems.

To help ease the way, he announced that the United States would permit Poland to retain for its own use the \$200 million previously contributed to an international stabilization fund for the Polish currency and that he was asking other contributors to the \$1 billion fund to do the same.

The offer is conditional on Polish compliance with an International Monetary Fund program calling for limits on its budgetary deficit and other austerity policies.

The United States has previously provided about \$4 billion in aid to Poland since 1989, the White House said.

In return, Mr. Bush asked Mr. Walesa to give U.S. exporters the same tariff advantages that will be granted to the European Community under pending arrangements that will put Americans at a competitive disadvantage. A White House official quoted Mr. Walesa as saying the issue could be worked out.

"It is not safe at all here after the dismantling of the Soviet Union, only today the dangers are somewhat different," Mr. Walesa told Mr. Bush as their round of talks began. Arguing for

continued American involvement, he said, "I am convinced that without a U.S. presence we won't make it at all."

Later, speaking to the crowd estimated at 10,000 gathered in the square, the onetime shipyard electrician from Gdansk observed, "We are taking a path that no one has ever trodden before, and it is not easy."

Apparently referring to Poland's recent months of political bickering and irresolution as well as its economic upheaval, Mr. Walesa maintained that "an order is growing out of this ferment," adding, however, that "we need more time."

Mr. Bush's visit, en route to the summit meeting of the Group of Seven industrialized democracies starting Monday in Munich, coincided with a moment of high emotion for many Poles because of the final funeral mass for Ignacy Jan Paderweski, the Polish statesman and pianist who died in the United States while seeking assistance for Nazi-occupied Poland in 1941. By order of President Franklin D. Roosevelt and the wishes of Paderweski's family, his body was interred in Arlington National Cemetery "until Poland is free."

Mr. Paderweski's remains were returned to Poland from Washington last week and given elaborate honors, culminating in Mass on Sunday in Warsaw's Cathedral of St. John the Baptist, attended by Mr. Bush and presided over by the Roman Catholic prelate of Poland, Cardinal Jozef Glemp.

The Paderweski ceremonies last week and Mr. Bush's public appearances Sunday were attended by a number of Polish Americans, giving rise to Republican Party hopes for help for Mr. Bush at the ballot box in November from the 8 million Americans who identify themselves as of Polish heritage.

Mr. Bush also went out of his way to praise the contributions of Polish Americans, saying at the end of his speech in the square that "in the stockyards of Chicago, in the steelworks of Cleveland, in a thousand towns thousands of miles from this land they loved, Poles worked and worshipped and built a better life."



# CETE's Multinational Climate

When you walk the halls of CETE these days, you never know what language you might hear. Spanish is the native tongue of Geannina Guzman-Olivo, a graduate research associate (GRA) with the Entrepreneurship Program since 1986. For two new members of the entrepreneurship staff, Elzbieta Jacowicz and Piotr Korynski, Polish is their native tongue. Chinese is the native language of Weidong Wang, a program associate for the new project in which CETE will serve as technical assistance management agency for China's Vocational-Technical Education Project. Fellows presently at the Center include Hidetoshi Fukumura from Japan and five individuals from Singapore. Russian visitors are frequent, and 20 businessmen from Japan were recent guests at the Center.

## Multinational Staff

*Geannina Guzman-Olivo*, who has an M.A. in Early and Middle Childhood Education, is pursuing her Ph.D. in Curriculum and Instruction at The Ohio State University (OSU) and working half-time as a GRA on entrepreneurship projects. Her work has involved providing entrepreneurship training for visiting scholars from the Republic of Turkey, developing a new curriculum based on traditional barriers for women and other groups in becoming business owners, creating a database of model entrepreneurship programs, and conducting a survey of students and teachers in vocational school entrepreneurship programs. She has also delivered presentations on entrepreneurship to small-business owners in her native Costa Rica.

Geannina is herself an entrepreneur, having founded and owned a preschool center in San Jose, Costa Rica, prior to coming to the United States. She continued to work with nursery and preschool children in Columbus from 1982-1984, first as a head teacher and later as a university teaching assistant. She has worked as a Spanish/English translator, served as a consultant to two small businesses exporting goods to Venezuela and Peru, and developed a Spanish-language seminar to prepare trainers in private development organizations to understand the implications of women-owned, micro-enterprises in marginal populations and developing countries.

*Elzbieta Jacowicz*, a program associate at CETE since August 1, comes to us from Gdynia, Poland, approximately 10 miles north of Gdansk. She has a master's degree in economics from the University of Gdansk, experience in business administration, and English/Polish translation skills. Following graduation, she worked for 4 years for the Polish Ocean Lines Shipping Company in the Container Operation Department. From there, she moved to a position as office manager at EXO, a limited liability company working in the area of environmental protection. Although the company still exists, no one presently works there due to financial difficulties. Thus, the employees, while still technically employed by the company, needed to seek work elsewhere. Elzbieta chose to work for a year as a cabin stewardess for Chandris Celebrity Cruises. Asked how she felt about cleaning cabins with a master's degree in economics, she indicated that many of the ship's crew members had advanced degrees,

including Ph.D.'s, but must take such jobs in the face of high unemployment.

Her responsibilities for the entrepreneurship project focus presently on translation of English materials into Polish for use in workshops there. Among her many hobbies are literature, cinema, jazz music, mountain climbing, and swimming.

*Piotr Korynski*, too, joined the CETE staff August 1; is originally from Gdynia, Poland; and has a master's in economics from the University of Gdansk. Piotr explains that in Poland, there is no bachelor's degree program for regular day students; all students complete a 5-year program leading to a master's degree. Piotr is a GRA at CETE, working half-time while pursuing a Ph.D. in economics at OSU. He is interested in international work related to developing economies, the problems of underdevelopment, and the restructuring of underdeveloped economies.

Before coming to Columbus, Piotr taught economics at the University of Gdansk; was responsible for small-business development for Solidarity's Economic Foundation, helping to identify the elements needed for an effective government support system; and also worked for the Research Center on the European Community, the first EEC (European Economic Community) documentation center in the whole of Eastern Europe. Prior to these activities, he was a management assistant for a foreign trade company for 4 years and worked for the Port Authority in Gdynia for 1 year.

Piotr's hobbies include mountain hiking, and he spent a month trekking in the Himalayas in Nepal. He speaks a number of languages but claims fluency in "only" English, Polish, Russian, and French.

*Weidong Wang* joined the CETE staff in September, having recently completed a second master's degree in heat engineering at OSU. He came to Ohio from the People's Republic of China, where he was a senior program officer for the Department of Vocational and Technical Education at the State Education Commission (SEdC). In 1988, the SEdC awarded him second prize for scientific and technical progress. He holds both bachelor's and master's degrees in heat engineering from Chongqing University in Chongqing, China, with specializations in coal combustion and power plant operation.

With Weidong in Columbus are his wife Linda Liu, who has a master's in engineering mechanics, and his 7-year-old son, Xun Wong, the only family member without a master's degree. Xun Wong is in the second grade and, his father says, is mastering idiomatic English quickly, sometimes to the initial confusion of his parents. The family would like to travel while they are here, seeing particularly the New England states.

## Visiting Scholars from Abroad

*Hidetoshi Fukumura* is a fellow at the Center through December, participating in intensive English instruction and studying the role of the community college in the United States. In October, he attended an ASTD/HRD Fair in Columbus; attended a National Teleconference on Tech Prep sponsored by OSU's Department of Agricultural Education in cooperation with the National Center for Research in Vocational Education (NCRVE); visited Hocking College in



**APPENDIX**  
**1.0**

**COORDINATE  
PROGRAM**



July planning meeting in Gdansk



Coca Cola emerges in the old town



Entrepreneurship class for soon-to-be laid off airplane factory employees



Martha C. Cooper  
Associate Professor of  
Marketing and Logistics  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
614-292-5761  
FAX 614-292-0440

**Experience in Eastern Europe:**

Taught three of ten modules on Logistics in Poland, Hungary, and Czechoslovakia April 22-May 2, 1992 for MUCIA US AID grant.

**Other Overseas Experience:**

Presented at conferences in England, Germany.

Spent 1959-1960 in Khartoum, Sudan, while father with US AID.

**Teaching, Presentations, and Continuing Education:**

Taught International Marketing for several years. Have taught almost all marketing courses offered at one time or another.

Have taught in four executive education programs.

Have made many presentations at conferences attended by business people. Two of interest are South Carolina International Trade Institute and Transportation Research Board conference on international trade.

Track Chair for International Logistics Conference for past three years.

**Material/Resources Will Use in Preparing Export Marketing Course:**

World Trade Institute, NY. Does continuing education on import/export marketing/logistics. Co-host of the International Logistics Conference.

Former Deputy Undersecretary of Commerce and head of an Import/Export Center at Georgetown for several years. Has travelled extensively, especially in Eastern Europe lately.

Cash Kowalski, head of International Programs for College of Business.

92

Former head of export logistics for DEC. Now has own business in Columbus to help US companies export/import.

Students from US AID program in spring in Poland (e.g., DHL, shoe importer, food importer and exporter). Also counterparts from Warsaw School of Economics.

Local business that specializes in new business startup and positioning.

Former head of European logistics for 3M. Now consultant in Europe. Has been in Poland and East Europe several Times.

Case study companies from my most recent book who do production in Eastern Europe. Other companies with whom I have contacts who are doing business in Eastern Europe.

## Martha C. Cooper

Faculty of Marketing  
College of Business  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
(614)292-5761

### Education and Certification

- Ph.D.      Marketing and Logistics  
            The Ohio State University, Columbus, Ohio, 1982.
- M.S.      Industrial Administration  
            Purdue University, West Lafayette, Indiana, 1968.
- B.S.      Math/Computer Science  
            Purdue University, West Lafayette, Indiana, 1968.

### Employment

Associate Professor, The Ohio State University, October, 1987 to present.

Assistant Professor, The Ohio State University, September, 1982 to September, 1987.

Lecturer, The Ohio State University, January, 1982 to August, 1982.  
Courses taught included undergraduate and graduate courses in quantitative techniques and computer applications for Logistics and introduction to marketing.

Teaching and Research Associate, The Ohio State University, September, 1978 to June, 1981.

Marketing Instructor, Department of Management and Marketing, Western Carolina University, January, 1977 to August, 1978. Courses taught included introduction to marketing, promotion strategy, marketing research, consumer behavior, and quantitative methods.

Marketing Instructor, School of Business and Economics, Austin Peay State University, Clarksville, TN, September, 1972 to June, 1975. Courses taught included retailing, advertising, promotion strategy, international marketing, marketing management, introduction to computers, and production management. Started Phi Chi Theta professional business fraternity chapter. Co-advisor to American Marketing Association student chapter.

Baltimore County Board of Education, Baltimore, Maryland, October, 1971 to June, 1972. Taught business and mathematics at the high school and junior high levels.

#### Other Marketing Experience:

Brand Assistant, Proctor and Gamble Company, Cincinnati, Ohio, September, 1968 to September, 1969. Responsible for brand's sales promotion, packaging, budget control, research and market analysis, and planning and recommendation of improvements.

Computer Time-Sharing Sales and Customer Service Representative, Hypermation, Inc., Cincinnati, Ohio, November, 1969 to May, 1970. Responsible for selling new accounts and assisting current customers, including teaching programming and systems courses.

#### Publications

"Logistics in the Decade of the 90's," Chapter in Distribution Handbook, Chicago, IL: Council of Logistics Management, (forthcoming), 1992.

→ Strategic Planning for Logistics, with Dan Innis and Peter Dickson, Oak Brook, IL: the Council of Logistics Management, 1992.

"The Role of Bundled Maintenance Warranties," Robert S. Owen and Martha C. Cooper, Developments in Marketing Science, Vol. 14, Ft. Lauderdale, May, 1991.

→ "Supply Chain Management, Partnerships, and the Shipper-Third Party Relationship," Lisa M. Ellram and Martha C. Cooper, International Journal of Logistics Management, Vol.1, No.2, 1990, pp. 1-10.

"A Comparative Review of Freight Consolidation and Backhauling Models; Synthesis and Future Directions," HoKey Min and Martha C. Cooper, The Logistics and Transportation Review, Vol. 26, No. 2, June, 1990, pp. 149-169.

"Managerial Considerations for Integrating Information Technology," Martha C. Cooper, RPS News, October, 1990, pp. 3,7.

→ "Europe 1992: Benefits and Challenges for International Transportation," Martha C. Cooper, Rosemary Kalapurakal, and Peter Bolt, Transportation Journal, Summer, 1990, pp. 33-41.

"The Value-Added Role of Boundary-Spanning Employees," Robert S. Owen, John R. Grabner, and Martha C. Cooper, Developments in Marketing Science, B.J. Dunlap ed., Vol. 13, New Orleans, April, 1990, pp. 513-517.



"The Competitive Edge: Evaluating the Changing Shipper-Carrier Relationship," Transportation Executive Update, Vol. 3, No. 5, September/October 1989, pp.6-14.

"Trends in the Use of Electronic Data Interchange: Expectations of Shippers, Carriers, and Warehousemen," James M. Masters and Martha C. Cooper, Proceedings of the Society of Logistics Engineers, San Francisco, August, 1989, pp. 13-20.

"Developing Partnerships with Third Party Providers: Implications for Just-in-Time," John R. Grabner and Martha C. Cooper, Proceedings of the Society of Logistics Engineers, San Francisco, August, 1989, pp. 29-35.

Partnerships in Providing Customer Service: A Third Party Perspective, Bernard J. La Londe and Martha C. Cooper, Oak Brook: Council of Logistics Management, 1989. Excerpts reprinted in Air Cargo World, August, 1989. The book was reviewed in The Defense Transportation Journal, August, 1989, and Transportation Journal, Fall, 1989.

→ "Logistics as an Element of Marketing Strategy, Both Inside and Outside the Firm," Martha C. Cooper, Richard H. Goodspeed, Charles B. Lounsbury, Proceedings of the Council of Logistics Management Conference, Boston, October, 1988, pp. 51-71.

"Logistics Practice in Retailing: Emphasis on Information Management and Transfer in Leading-Edge Firms," Martha C. Cooper, Krickett Bucey, Lisa Ellram, and Mary Margaret Weber, Proceedings of the Academy of Marketing Science Retailing Conference, Charleston, October, 1988, pp. 103-107.

"The Impact to Personal Computing Technology on the Education of Logistics Managers - A Comparison of a Military and a Civilian Institutional Approach," Martha C. Cooper and Frederick W. Westfall, Proceedings of the Society of Logistics Engineers Conference, Orlando, August, 1988, pp. 407-415.

"Elements of Strategic Partnership," John Gardner and Martha Cooper, Partnerships: A Natural Evolution in Logistics, J. E. McKeon ed., Cleveland: Logistics Resource, Inc., April, 1988, pp. 15-32.

→ Customer Service: A Management Perspective, Bernard J. La Londe, Martha C. Cooper and Thomas G. Noordewier, Oak Brook: Council of Logistics Management, 1988.

"A Study of Standardization of Variables in Cluster Analysis," Glenn W. Milligan and Martha C. Cooper, Journal of Classification, Vol. 5, No. 2, 1988, pp. 181-204.

"The Effect of Measurement Error on Determining the Number of Clusters in Cluster Analysis," Martha C. Cooper and Glenn W. Milligan, Proceedings of the International Workshop on Data Analysis, Decision

Support and Expert Knowledge Representation in Marketing and Related Areas of Research, Spring, 1988, pp. 319-328.

- "Customer Service: A Powerful, Competitive Tool," Martha C. Cooper, guest editorial in Inbound Logistics, Thomas Publishing Company, January/February, 1988, p. 14.
- "What Blue Collar Employees Want in Health Promotion Programs: The Bristol-Myers USPNG Case," Karen L. Blozis, Moon S. Chen, and Martha C. Cooper, Health Values, Vol. 12, No. 2, March/April, 1988, pp. 24-28.
- "A Review of Clustering Methodology," Glenn W. Milligan and Martha C. Cooper, Applied Psychological Measurement, Vol. 11, No. 4, December, 1987, pp. 329-354.
- "Comment on 'The Change Management Process'", Martha C. Cooper, Managing Logistics Change Through Innovative Information Technology, Granville, Ohio, August 12, 1986, pp. 45-48.
- "Investigating the Salesperson Hiring Process," Martha C. Cooper and Wesley J. Johnston, Proceedings of the AMA Winter Educators' Conference, St. Petersburg, February 16-19, 1986.
- "A Study of the Comparability of External Criteria Across Hierarchy Levels," Glenn W. Milligan and Martha C. Cooper, Multivariate Behavioral Research, Vol. 21, 1986, pp. 441-458.
- "The Segment Competition Matrix: A Strategic Management Tool for the Transportation Industry," Martha C. Cooper and Randall Rose, Transportation Journal, Vol. 25, No. 1, Fall, 1985, pp. 25-37.
- "Using Computer Applications in the Teaching of Logistics," Proceedings of the Conference on Computer Software Use in Transportation and Logistics Management, Babson College, June, 1985. Also presented at the American Marketing Association Workshop on Minicomputers in Marketing at Virginia Polytechnic Institute, October, 1985.
- "An Examination of Procedures for Determining the Number of Clusters in a Data Set," Glenn W. Milligan and Martha C. Cooper, Psychometrika, Vol. 50, No. 2, 1985, pp. 159-179. Referenced in SAS manual, version 5.
- "Cost and Delivery Time Implications of Freight Consolidation and Warehousing Strategies," Martha C. Cooper, the International Journal of Physical Distribution and Materials Management, Vol. 14, No. 6, 1984, pp. 47-67.
- "Freight Consolidation or Warehouses?," Martha C. Cooper, Proceedings of the Society of Logistics Engineers, Minneapolis, August, 1984, pp. Cooper 1-7.

- "Freight Consolidation and Warehouse Location Strategies in Physical Distribution Systems," Martha C. Cooper, Journal of Business Logistics, Vol. 4, No. 2, 1983, pp. 53-74.
- "Energy Use and Consumer Behavior at the Macro Level," Wesley J. Johnston, Thomas J. Page, Jr., and Martha C. Cooper, Proceedings of the American Marketing Association Educator's Conference, Washington, D.C., August, 1981, pp. 291-294.
- "Career Patterns in Distribution - Profile 1981," Bernard J. La Londe and Martha C. Cooper, Proceedings of the National Council of Physical Distribution Management, Chicago, October, 1981, pp. 15-48.
- "Industrial Sales Force Selection: Current Knowledge and Needed Research," Wesley J. Johnston and Martha C. Cooper, Journal of Personal Selling and Sales Management, Vol. 1, No. 2, Spring-Summer, 1981, pp. 49-57.
- "Analyzing the Sales Force Selection Process," Wesley J. Johnston and Martha C. Cooper, Industrial Marketing Management, Vol. 10, April, 1981, pp. 139-147. Also appeared in Proceedings of the Professional Sales Executive Educators' Conference, Louisville, April, 1980.
- "The Design of Advertising Experiments Using Statistical Decision Theory: An Extension," James L. Ginter, Martha C. Cooper, Thomas J. Page, Jr., and Carl Obermiller, Journal of Marketing Research, February, 1981, pp. 120-123.
- "Understanding and Measuring Changes in Consumer Behavior Over Time," Wesley J. Johnston and Martha C. Cooper, Topic Table Session, Proceedings of the American Institute for Decision Sciences National Conference, Las Vegas, November, 1980.
- "Career Patterns in Distribution - Profile 1980," Bernard J. La Londe and Martha C. Cooper, Proceedings of the National Council of Physical Distribution Management, Atlanta, October, 1980, pp. 1-30.
- "Career Patterns in Distribution - Profile 1979," Bernard J. La Londe and Martha C. Cooper, Proceedings of the National Council of Physical Distribution Management, Houston, October, 1979, pp. 15-44. Reprinted in Distribution, November, 1979, 57-81.

## Reports

- "Survey of Logistics Computer Software for Educational Use," Martha C. Cooper et al., presented at the Transportation and Logistics Educators Conference, Anaheim, CA, October 5, 1986.

58

**Work in Progress**

"Comparing Kohonen's Neural Network Method with a Kmeans Clustering Method," with Sundar Balakrishnan, Varghese Jacob, and Phillip Lewis.

"The Effect of Quantity Discounts and Transportation Rate Breaks on Inbound Freight Consolidation Strategies," with Randall Russell under revision at The International Journal of Logistics and Materials Management.

"Strategic Alliances," with Lisa Williams and Lisa Ellram.

"Some Definitions in Physical Instrumentation and Measurement," Robert S. Owen and Martha C. Cooper, under revision for Behavior Research Methods, Instruments, and Computers.

Chapter for the revised Distribution Handbook

Video to accompany wholesaling chapter of Basic Marketing by McCarthy and Perreault

**Presentations**

→ "International Strategic Partnering", Transportation REsearch Board 17th Annual Conference on Ports, Inland Waterways, and International Trade, Charleston, SC, July 15-17, 1992.

"Comparison of Neural Networks for Clustering with K-Means Non-Hierarchical Clustering," Martha Cooper, P.V. Balakrishnan, Varghese S. Jacob, and Philip Lewis, Classification Society of North America, East Lansing, June 11-13, 1992.

"Supply Chain Management," with Lisa Ellram, colloquium at Arizona State University, March, 1992.

"Partnerships," colloquium for University of British Columbia, March, 1992.

"Freight Consolidation: Current Status and Future Research Issues," Martha Cooper and Ho Key Min, invited session, Logistics College, ORSA/TIMS National Meeting, Anaheim, November 2-5, 1991.

"Neural Networks for Clustering Applications in Marketing - A Comparative Analysis with K-Means," P.V. Balakrishnan, Martha Cooper, and Varghese S. Jacob, Information Systems College, ORSA/TIMS National Meeting, Anaheim, November 2-5, 1991.

"Logistics Strategic Planning - What it is and How firms are doing it," Martha C. Cooper, Robert A. Amos, Daniel E. Innis, Council of Logistics Management, New Orleans, September 29-October 2, 1991.

"CLM Research Studies - Review" and "Research Opportunities Roundtable" panel member, First Doctoral Consortium, Council of Logistics Management, New Orleans, September 28, 1991.

→ "Comparison of Neural Networks for Clustering with K-Means Non-Hierarchical Clustering," Martha Cooper, P.V. Balakrishnan, Varghese S. Jacob, and Philip Lewis, invited presentation, International Federation of Classification Societies, Edinburgh, Scotland, August 5-9, 1991.

"The Strategic Logistics Planning Process," OSU Continuing Education program on "Logistics as a Source of Competitive Advantage," June 2-5, 1991.

"Customer Service Implications of Direct Store Delivery," John Langley, Masao Nishi, Martha Cooper, American Baker's Association, Cincinnati, May 7, 1991.

"The Art of Forming Strategic Partnerships," Association of Professional Design Firms, Oak Brook, April 20-21, 1991.

→ "Developing a Strategic Customer Service Program," Seminar for the Columbus Chapter of the American Marketing Association, Columbus, February 7, 1991.

"Strategic Planning, Integrational and Implementation," Insight Annual User's Meeting, Bend, Oregon, February 4, 1991.

"Strategic Logistics Planning," Taped interview for Transportation Digest, February 4, 1991.

"Relationship Selling Through Customer Service," one day seminar presented to the Safety Equipment Distributors Association, The Sagamore, Bolton Landing, N.Y., August 7, 1990.

"Should You Be Using EDI?" Martha Cooper and Margaret Emmelhainz, Exxon Seminar Series, University of Charleston, Charleston, SC, June 8, 1990.

"Customer Service Research Applications for Traffic Managers," Continuing Education Senior Transportation Executive Development Program, Air Force Institute of Technology, Dayton, March 13 and July 17, 1990.

"Partnerships in Providing Customer Service: A Third Party Perspective," Martha C. Cooper and Bernard J. La Londe, Annual Meeting of the Council of Logistics Management, St. Louis, October 22-25, 1989.

"Logistics as an Element of Marketing Strategy: Establishing the Strategic Importance of Logistics Both Inside and Outside the Firm," Martha C. Cooper and Richard H. Goodspeed, Annual Meeting of the Council of Logistics Management, St. Louis, October 22-25, 1989.

- "Trends, Benefits, and Challenges of Strategic Partnerships," Martha C. Cooper, Lisa Ellram, Rosemary Kalapurakal, and Lisa Williams, Buyer Behavior Track, AMA Winter Educator's Conference, Scottsdale, AZ, February 24-27, 1990.
- "Trends in the Use of Electronic Data Interchange: Expectations of Shippers, Carriers, and Warehousemen," James M. Masters and Martha C. Cooper, Annual meeting of the Society of Logistics Engineers, San Francisco, August 31, 1989.
- "Developing Partnerships with Third Party Providers: Implications for Just-in-Time," John R. Grabner and Martha C. Cooper, Annual meeting of the Society of Logistics Engineers, San Francisco, August 31, 1989.
- "Performance Improvements through Supply Chain Management," presented at the Annual meeting of the Society of Logistics Engineers (substituting for missing speaker), San Francisco, September 2, 1989.
- "Market Research Resources at OSU: Faculty," with Charles Popovich to the Information Exchange for Market Research, sponsored by the Columbus Chamber of Commerce, Page Hall, August 23, 1989.
- "Electronic Data Interchange in Transportation," South Carolina International Trade Institute, Charleston, May 17, 1989.
- "Linking Logistics and Marketing," tape interview for Transportation Digest (tape series for executives), May, 1989.
- "Customer Service Research Applications for Traffic Managers," Continuing Education Senior Transportation Executive Development Program, Air Force Institute of Technology, Dayton, January 5 and July 18, 1989.
- "Future Directions of Logistics Education," Martha C. Cooper and Frederick W. Westfall, Logistics Education Foundation of the Society of Logistics Engineers, Colorado Springs, September 21, 1988.
- "Logistics as an Element of Marketing Strategy, Both Inside and Outside the Firm," Martha C. Cooper, Richard H. Goodspeed, Charles B. Lounsbury, Council of Logistics Management Annual Meeting, October, 1988.
- "Logistics Practice in Retailing: Emphasis on Information Management and Transfer in Leading-Edge Firms," Academy of Marketing Science Retail Conference, Charleston, S.C., October 5-8, 1988.
- "The Impact of Personal Computing Technology on the Education of Logistics Managers - A Comparison of a Military and a Civilian Institutional Approach," Martha C. Cooper and Frederick W. Westfall, Annual Meeting of the Society of Logistics Engineers, Orlando, August, 1988.
- "Customer Service: The Buyer-Seller Interaction," Martha C. Cooper and John Gardner, Logistics Resource Forum, April, 1988.

"Logistics and EDI," Keynote address to Ordernet Users' Meeting, May 24, 1988, Columbus, Ohio.

"Customer Service Perspectives," morning session Executive Development Program for Distribution Managers, College of Business Administration, University of Tennessee, Knoxville, April 11, 1988.

→ "U.S. Logistics," presentation to Danish Logistics tour group from Copenhagen School of Economics and Business Administration, Institute for Transport, Tourism, and Regional Economics, The Ohio State University, April 19, 1988.

"Customer Service," Dayton Chapter, Society of Logistics Engineers, April 7, 1988.

"Overview of the Customer Service Study," Institute of Industrial Engineers Continuing Education Seminar, Columbus, Ohio February 20, 1988.

"Customer Service: A Management Perspective," Cincinnati Roundtable, Council of Logistics Management, October 15, 1987.

"Customer Service: The Shipper-Carrier Relationship," Council of Logistics Management, September 29, 1987.

"Customer Service: The Shipper-Public Warehouse Relationship," Council of Logistics Management, September 29, 1987.

"The Vehicle Routing Problem with Product Consolidation and Backhauling," Hokey Min, John Current, and Martha Cooper, presented at ORSA/TIMS Joint National Meeting, New Orleans, April, 1987.

→ "The Effect of Standardization on Cluster Recovery," Glenn W. Milligan and Martha C. Cooper, presented at the Classification Society of North America meeting, Montreal, June 16-18, 1987, and at the International Classification Society meeting, University of Aachen, Aachen, West Germany, June 29-July 1, 1987.

→ "The Effects of Measurement Error on Determining the Number of Clusters in Cluster Analysis," presented at the International Classification Society, Aachen, West Germany, June 29-July 1, presented at the Seminar on Data Analysis Decision Support and Expert Knowledge Representation in Marketing and Related Areas of Research, Karlsruhe, West Germany, June 21-23, 1987.

"Survey of Logistics Software for Educational Use," report presented to the Transportation and Logistics Educators' Conference, Anaheim, October 5, 1986.

"Changing Lifestyles: Implications for the Information Age," presented to the Columbus Chapter of the Institute of Internal Auditors, January 14, 1986.

- "Using Computers in the Teaching of Logistics," presented to the College of Business Management Information Systems Advisory Board, Spring, 1986.
- "Microcomputer Applications in Teaching," American Marketing Association Workshop on Microcomputers in Marketing, Virginia Polytechnic and State University, October, 1985.
- "Changing Lifestyles: Implications for Cooperative Management," presented at The Graduate Institute of Cooperative Leadership, part of the continuing education program of the College of Agriculture, University of Missouri, Columbia, July 18, 1985.
- "The Influence of Outliers on Cluster Recovery," Martha C. Cooper and Glenn W. Milligan, presented at the Joint European Meeting of the Classification and Psychometric Societies, Cambridge, England, July 5, 1985, and the North American Meeting of the Classification Society, St. Johns, Newfoundland, July 12, 1985.
- "A Study of the Comparability of External Criteria Across Hierarchy Levels," Glenn W. Milligan and Martha C. Cooper, presented at the Joint European Meeting of the Classification and Psychometric Societies, Cambridge, England, July 5, 1985, and the North American Meeting of the Classification Society, St. Johns, Newfoundland, July 12, 1985.
- "Using Computers in the Teaching of Logistics," presented at the Babson Conference on Computer Software Use in Transportation and Logistics Management, Babson College, Wellington, MA, June, 1985.
- "The Effect of Error on Determining the Number of Clusters," Martha C. Cooper and Glenn W. Milligan, presented at ORSA/TIMS Joint National Meeting, Dallas, November 27, 1984.
- "Exploring the Manufacturing/Distribution Interface," Martha C. Cooper and Eugene Sailer, presented at the National Council of Physical Distribution Management National Meeting, Dallas, September 17, 1984.
- "A Methodology for Studying Freight Consolidation and Warehouse Location," presented to logistics and simulation students and faculty at Syracuse University, February, 1984. Also presented to O.S.U. Management Science doctoral seminar, April, 1983.
- "An Examination of Procedures for Determining the Number of Clusters in a Data Set," Glenn W. Milligan and Martha C. Cooper, presented at both the Annual North American Meeting of the Classification Society, Philadelphia, May 29-31, 1983, and the Joint European Meeting of the Classification and Psychometric Societies, Jouy-en-Josas, France, July 6-9, 1983.
- "Key Dimensions in Industrial Logistics," presented with Bernard J. La Londe and Thomas Speh at the American Marketing Association Faculty



National Symposium on Industrial Marketing, Columbus, Ohio, July 5, 1982.

"Investigating the Sales Force Selection Process Using Conjoint Analysis," Martha C. Cooper and Wesley J. Johnston, presented at the Professional Sales Executives Educators' Conference, Louisville, April, 1980.

### Book Reviews

Review of Multivariate Descriptive Statistical Analysis by Ludovic Lebart, Alain Morineau, and Kenneth M. Warwick, Journal of Marketing Research, May, 1985, pp. 226-227.

Review of Multivariate Observations, by G.A.F. Seber, Journal of Marketing Research, May, 1985, pp. 225-226.

Review of Resource Management by Paul S. Bender in Journal of Business Logistics, 5, No. 1, 1984, pp. 152-154.

Reviewed three marketing principles texts for publisher, with Stan Scott.

Reviewed one marketing principles computer exercise for publisher, with Stan Scott.

### Professional Organizations

American Marketing Association  
 The Classification Society  
 The Information Exchange for Market Research  
 The Institute of Forecasters  
 The Institute of Management Sciences  
 The Council of Logistics Management  
 The Society of Logistics Engineers  
 Urban Transportation Discussion Group  
 Warehouse Education and Research Council

### Honors and Awards

Best Paper published in International Journal of Logistics, 1990 (co-author with Lisa Ellram).

1990 Distinguished Transportation/Logistics Professor in North America (one of 12) by International Intermodal Group.

"Support Academic Participation and Foster Education" award to the Columbus Roundtable of the Council of Logistics Management for year served as president, 1989.

1988 first OSU Chapter Sigma Chi Fraternity Outstanding Teaching Award

- 1988 Dean's Teaching Professorship  
College of Business, The Ohio State University
- 1983 Dean's Research Professorship  
College of Administrative Science, The Ohio State University
- 1982 Sheldon B. Ackerman Award for outstanding business logistics research
- 1981 A.T. Kearney Doctoral Dissertation Award  
The National Council of Physical Distribution Management

**Scholastic Honoraries:**

Beta Gamma Sigma  
Phi Kappa Phi  
Alpha Lambda Delta

**Involvement in Professional Programs, Extension, and Service Activities**

Three sessions of Logistics module for U.S. AID grant to Midwestern Universities Consortium (MUCIA) for business and economic education in Eastern Europe, Hungary, Poland, Czechoslovakia, April 22-May 2, 1992.

Ad hoc reviewer for Journal of Retailing, 1992. Also reviewed for AMA Educator's conference, Logistics and Transportation Review, Decision Sciences, Journal of the Operational Research Society, Marketing and Public Policy Conference.

Finance Chair for 1992 Annual Council of Logistics Management Meeting, San Antonio, October 11-14, 1992.

Society of Logistics Engineers Committee on Business Involvement, 1991-2.

Summer Research Opportunities Program faculty sponsor for Tina Waddy, Coppin State, Baltimore, Summer quarter, 1990.

Chair of Committee to Save the Mark Road Bridge, Fayette County, Ohio. Presentation to the Ohio Historic Preservation Board, June 1, 1990.

Tract Chair, Council of Logistics Management Annual Meeting, Anaheim, October 7-10, 1990.

Selection Committee for the Distinguished Service Award for 1990, Council of Logistics Management.

Track Chair for Second International Logistics Symposium, co-sponsored by the Council of Logistics Management and the World Trade Institute, New York, April 30-May 1, 1990, 1991, until EE trips for 1992

65

→ Session Chair, "International Supply Chain Management, Partnerships: Tools of Strategic Planning?" Buyer Behavior Track, AMA Winter Educator's Conference, Scottsdale, AZ, February 24-27, 1990.

Panel Organizer, "Information Technology and Logistics Practice," Society of Logistics Engineers Annual Meeting, August 31 - September 2, 1989.

Co-Chair, Transportation and Logistics Educators' Conference, Boston, October, 1988.

Member, Board of Directors, Classification Society of North America, 1988 (elected): Member of nominating committee, 1988. Chair of Nominating Committee, 1989.

→ Council of Logistics Management Columbus Roundtable (elected):  
 Secretary 1984-1985,  
 Treasurer 1985-1986,  
 Vice President - Hospitality 1986-1987,  
 Vice President - Program Chair 1987-1988,  
 President 1988-1989,  
 Board of Directors 1989-1990,  
 Past Presidents Committee (Scholarship Fund Committee, Selection Committee Chair) 1989-1991,  
 Nominating Committee Chair 1990,  
 Selection Committee for students to attend National Meeting 1985-1990.

Chair, Computer Case Tract, Transportation and Logistics Educators' Conference, Atlanta, October, 1987.

Tract Chair, Council of Logistics Management Annual Meeting, Atlanta, September 27-30, 1987.

Member of Conference Committee for the annual meeting of the Classification Society of North America, Columbus, June 14-16, 1986.

Member of Selection Committee for Warehouse Education Research Council Burr Hupp Scholarship, 1986.

Chair, Logistics Software Clearinghouse Task Force, 1985-1989.

Co-Chair, Transportation and Logistics Educators' Conference, St. Louis, October, 1985.

Reviewer for one track each for 1985, 1986 AMA Educators' Conferences.

Associate Editor, Distribution Handbook, New York, The Free Press, 1985.

Chair, two sessions, Marketing Applications, ORSA/TIMS Joint National Meeting, Dallas, November 26-28, 1984.

Chair, Transportation and Logistics Educators' Conference, Dallas, September, 1984.

Reviewer, proposals for Ohio Department of Transportation projects, August, 1983, and August, 1984.

Member of Selection Committee for 1983 NCPDM A.T. Kearney Doctoral Award recipient.

Chair, Transportation and Logistics Educators' Conference, New Orleans, October, 1983.

### **Major University and College Committees**

Committee for Graduate Education in Business Administration, 1991-1992.

Professional Practice Faculty Advisor for Co-op and Internship Program, 1991.

Marketing Faculty recruiting chair and Affirmative Action Designee, 1990.

Chair of Transportation and Logistics Scholarship luncheon May 31, 1990, Chair of Shell Minority Scholarship selection committee, Chair of B. J La Londe T&L Scholarship selection committee.

Member of College M.B.A. Policy Committee, 1987-1989.

Member of College Computer Equipment and Utilization Committee, 1983-1987.

Member of College Management Information Systems Advisory Board, 1982-1991.

Chair, Marketing Faculty Computer Equipment Committee, 1985-1989.

Member of the following Marketing Faculty committees:

External Affairs 1982-1985

Masters 1985-1990

Professional Interaction 1985-1986

Recruiting 1986-1990

Affirmative Action Designee 1987-1988

Undergraduate 1982-1985

Operations and Logistics Management Coordinating Committee 1984-1989:  
Chair 1985-1987, Co-chair 1989; brochure and promotion subcommittees 1984-1985, brochure committee 1988; scholarship selection committee 1988, 1989, 1990.

Transportation Research Center Team (University-wide), 1987-1988.

Special Interest Group on Teaching Problem Solving, Center for Teaching Excellence, 1988-1989.

Served on 18 doctoral dissertation committees (four have won awards), chair of another; two masters committees, chair of another.

67

Grants

1983 Dean's Research Professorship, College of Administrative Science, The Ohio State University, \$2,000.

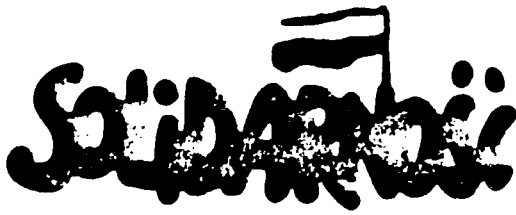
1983 National Science Foundation Travel Grant to attend International Federation of Classification Societies meeting, Cambridge, England.

1985 National Science Foundation Travel Grant to attend International Federation of Classification Societies meeting, Aachen, West Germany.

1988 Dean's Teaching Professorship, College of Business, The Ohio State University, \$2,000.

Co-investigator, Council of Logistics Management Customer Service Study, 1987, \$50,000 (Principal investigator Bernard J. La Londe).

Principal investigator, Council of Logistics Management Strategic Planning Study, 1990, \$13,000 (Peter Dickson, Dan Innis co-investigators).



**AID II  
ACTIVITY REPORT**

1.07-30.09.92

1. Coordinating work of Entrepreneurship Institutes
  - phone calls every week to answer questions and check current activities of three centers;
  - more phone calls to Rzeszów to help with organization of Pilot Course;
  - 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. Tracing the books sent to the Institutes from the USA and sending them to the three sites.
  
4. Supervising work of the Institutes as far as translation, typing and copying of materials is concerned:
  - designing of front pages (with new logo) and sending them to all sites.
  
5. Equipment:
  - ensuring the requirements of the Institutes regarding equipment purchase for the II year of the project.
  
6. Coordinating activities of Task Force:
  - supervising organization of the fourth meeting in Warsaw

7. Collecting information about courses offered currently at Institutes.

8. Preparing text and design of a new brochure and files of Institutes:

- sending the proposal of the design to three cites to be accepted;
- negotiating costs with the designer and the printing house;
- supervising work of a hired designer;
- supervising work of a printing house;
- providing sites with the new promotion materials.

9. Coordinating Case Studies and Video production:

- distributing I year materials - sending them to Entrepreneurship Institutes, Regional departments of Economic Foundation NSZZ "Solidarność";
- sending those materials to educational institutions and schools which expressed wish to use them in their programs;
- broadcasting films at cable education TV in Wejherowo i Radom;
- promotion of the materials (the book and tapes) at National Book Fair in Warsaw, September;
- supervising work of teams responsible at all sites for case and video production - sending to the Institutes information about the meeting of those teams in Gdańsk in October.

Alicja Unterschutz



**ECONOMIC FOUNDATION  
NSZZ SOLIDARNOŚĆ**

80-855 GDAŃSK  
ul. Waly Piastowskie 24  
POLAND

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

---

**FINANCIAL REPORT**

1.06.92-30.09.92

1. Staff - 2 salaries	2 400 USD
2. Managerial Centers	43 960 USD
3. Prepayment for the Workshop in Rzeszów	10 000 USD
4. Local travel	340 USD
5. Materials purchase	110 USD
6. Others (DHL, mail, faxes, phones, designer payment)	330 USD
<hr/>	
TOTAL	57 140 USD

*Alija Unterschutz  
Coordinator*

70



**SMALL BUSINESS INSTITUTE COORDINATORS' MEETING  
JULY 10, 1992**

**REPORT ON CLASSES AND PROGRAM APPROACH  
POZNAN  
BIALYSTOK  
RZESZOW**

**FORUM  
FEEDBACK ON 1992 FORUM  
PLANS FOR NEXT YEAR**

**BUSINESS PLANS  
POZNAN  
BIALYSTOK  
RZESZOW**

**INFORMATION FOR YEAR 1 REPORTS  
EVALUATIONS  
BUSINESS OWNER PROFILES  
BUDGET - TOTAL FOR YEAR 1  
NEWSPAPER ARTICLES  
EQUIPMENT  
FACULTY RESULTS**

**STATUS OF CLASSROOM MATERIALS ETC.  
COPYRIGHT NOTICES  
CHANGES IMPLEMENTED LOCALLY  
MAGAZINES AND BOOKS**

**PLANS FOR YEAR 2  
BUDGET  
TRIP TO U.S.  
EXPORTING MODULE  
LOCATION FOR NOVEMBER WORKSHOP (11/2-20)  
CHANGES IN MATERIALS TO BE DEVELOPED WEEK OF AUGUST 17  
AND AFTER  
CONSULTING NEEDS  
WORLD NET PROGRAM  
SITE VISIT SCHEDULE  
STAFFING OF SBI  
COORDINATORS' RESPONSIBILITIES  
FACULTY RESPONSIBILITIES**

**MISCELLANEOUS  
MAGAZINE PROPOSAL  
SUCCESS STORIES  
PROPOSAL FOR YEAR 3  
OTHER**



1900 Kenny Road  
Columbus, Ohio 43210-1090

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

August 14, 1992

Nina Majer  
Project Specialist  
Agency for International Development  
U.S. Embassy Warsaw, Poland  
Al. Ujazdowskie 29/31  
Warsaw, Poland

Dear Nina:

We have discussed your Participant Training Information System format with the coordinators in our project and they agree that we can use it for our training, both of faculty members and of business owners. We may not be able to get business owners to tell us their sales figures but we will try. We plan to fill out one form per person and then list all the courses taken and the hours on that one form.

Our only problem is with question 15 since our training is being done by Polish trainers primarily. We propose to list their names in this section. We will also list U.S. trainers when appropriate. Will you provide the format in both Polish and English? And do you want the responses in Polish or English?

The third week of the U.S. visit of our Polish coordinators is upon us and everything is going well. It is always easier the second time around. Please let me know if I can assist you in any way.

Sincerely,

M. Catherine Ashmore  
Director, International Enterprise Academy

P.S. Received your fax of 8/18. The profiles were of all business owners that were trained in the first series of five courses and paid for by USAID funds in the subcontract to Solidarity. They paid a small fee also which covers other Center costs in each site.

13

Draft

## PARTICIPANT TRAINING QUESTIONNAIRE

A.I.D. Warsaw plans to establish a data-base system that will contain information on participants in any form of training under A.I.D.-funded programs. The system can be used for the benefit of participants when such follow-up activities as additional training or alumni associations are planned and arranged. Grantees and contractors may also benefit from the system, as it will contain information on the past training activities that can be used to better coordinate training efforts and avoid duplication.

Please be so kind and provide us with information regarding participants in any form of training in Poland under your A.I.D.-funded project. A list of questions that follows is divided into two groups: the first group contains questions about participants, the second -- questions about training. In providing information about training, please make it clear which group of participants it applies to.

If you need to contact participants to solicit some information from them please provide them with the explanation why the information is requested (as contained in the first paragraph). Please assure them that personal information will be treated as confidential and will be utilized only within A.I.D. for statistical analysis.

### Information about participants:

1. Name: Family name, First name, Middle name;
2. Date of birth: Year, month, day;
3. Gender: Please circle: M, F
4. Home Address: Voivodship (Region), Town, Street No., Telephone if available;
5. Name and address of employer;  
Name:  
Address: Voivodship, Town, Street No., Telephone and Fax.
6. Category of employment. Please underline:  
Employee,  
Self-employed,  
Not-employed (Student, Unemployed);

74

7. Sector of employment: Please underline:  
State,  
Private;

8. The main field of professional activity; (field of study for students); Please underline and add more specific information. For instance: Agriculture : Grain production  
or  
Agribusiness: Meat processing etc.

- Agriculture
- Agribusiness
- Health and Family planing
- Labor
- Public Administration
- Education and Research
- Housing
- Industry and Engineering
- Transportation
- Other, please specify;

9. Position within organization; Please underline:  
Non-managerial  
Lower level manager (supervisor)  
Middle level manager  
Top level manager;

10. Size of business (to be filled by business owners only)  
Total sales last year: Zl.  
Number of employees;

Information about training; to be filled for a group of trainees that took part in one course.  
Please make it clear which of the participants this information applies to.

11. Grant number;

12. Course title;

13. Course duration (in hours);

14. Course site: Region (Voivodship), Town;

15

15. Name of the U.S. trainer(s);
16. Evaluation of the course (if available);  
% of students evaluating course content as very important and important;  
% of students evaluating course as very well and well presented;
17. Local cooperating institution: Name, Location.

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

Institution: \_\_\_\_\_

Quarter: \_\_\_\_\_

Contact Person Regarding this Report \_\_\_\_\_

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

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

<b>STUDENT CONTACT HOURS</b>	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Students (Traditional)	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Government Officials	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Business Community/ Business Managers	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Journalists - Media	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Other Groups/Individuals	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Other Groups/Individuals	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	
Other Groups/Individuals	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	<input style="width: 60px; height: 25px;" type="text"/>	

**COMMENTS:**

VV

# 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

*Continued on back of page*

78

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.*

19

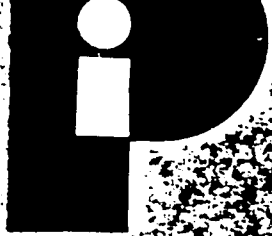


- **How could we improve the course?**

- **What did you like best about the course?**

- **What did you like least about the course?**

- **How did you feel about the price of the course?**

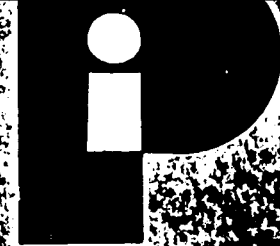


INSTYTUTY  
PRZEDSIĘBIORCZOŚCI

My  
także chcemy  
aby  
Twoja Firma  
osiągnęła

Success!





INSTYTUT  
PRZEDSIĘBIORCZOŚCI



FUNDACJA GOSPODARCZA  
NSZZ SOLIDARNOŚĆ  
oraz  
INSTYTUTY PRZEDSIĘBIORCZOŚCI

organizują

**ADRESY:**

- BIAŁYSTOK 15-351  
Białostocka Szkoła Biznesu  
ul. Wiejska 45 E  
tel. 085 / 21945
- RZESZÓW 35-030  
u. Zygmuntowska 2A  
tel. 017 / 39417
- POZNAŃ 60-964  
ul. Powst. Wlkp. 16 p.1521  
Akademia Ekonomiczna  
tel. 061 / 699261, w. 1195

**CENTRALA**

GDAŃSK 80-855  
ul. Waly Piastowskie 24  
Fundacja Gospodarcza NSZZ Solidarność  
tel. 058 / 384319

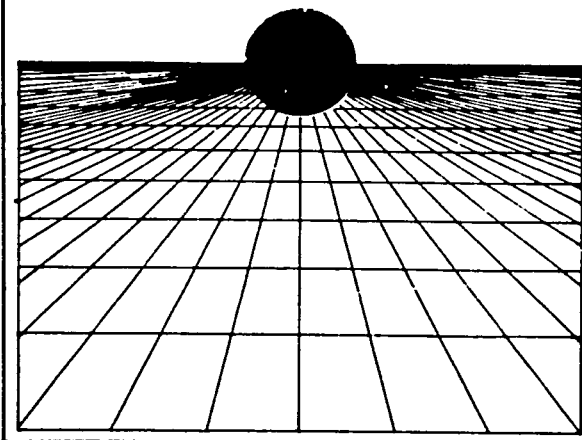
**SPONSORZY**

- U.S. Agency for International Development,  
Washington, DC
- Ohio State University, Columbus, OHIO

II KRAJOWE FORUM  
PRZEDSIĘBIORCZOŚCI

1993

Gdynia Polska



My  
także chcemy  
aby  
Twoja Firma  
osiągnęła!  
Sukces!



128

# INSTYTUTY PRZEDSIĘBIORCZOŚCI

oferują:

## profesjonalne szkolenia

dla przedsiębiorców prowadzących samodzielną działalność gospodarczą w zakresie:

- Zarządzania,
- Przedsiębiorczości,
- Marketingu,
- Finansów,
- Planowania Strategicznego,
- Importu / Eksportu.

Szczegółowa oferta poszczególnych Instytutów znajduje się na załączonej ulotce.

## indywidualny konsulting

dotyczący problemów związanych z prowadzeniem własnej firmy.

Szkolenia i konsulting prowadzone są przez kadrę złożoną z wykładów wyższych uczelni – ekspertów w danej dziedzinie. Korzystają oni z materiałów opracowanych specjalnie dla potrzeb Instytutów przez konsultantów amerykańskich – materiały te zostały adaptowane do warunków polskich.

## Instytuty Przedsiębiorczości

mają swoje siedziby w trzech miastach Polski:

- Białymstoku,
- Rzeszowie
- Poznaniu,

z centralą w Gdańsku.

Swoją bogatą ofertą Instytuty obejmują również ośrodki lokalne w każdym z trzech regionów.

W celu uzyskania pełnej informacji prosimy kontaktować się z najbliższym Instytutem Przedsiębiorczości

## Instytuty Przedsiębiorczości

powstały w wyniku realizacji Projektu sponsorowanego przez U.S. Agency for International Development, zarządzanego przez Center on Education and Training for Employment, The Ohio State University, Columbus, Ohio, oraz Fundację Gospodarczą NSZZ Solidarność, Gdańsk.

## Notatki:





**APPENDIX**  
**2.0**

**DEVELOP  
AND UPDATE  
MATERIAL**

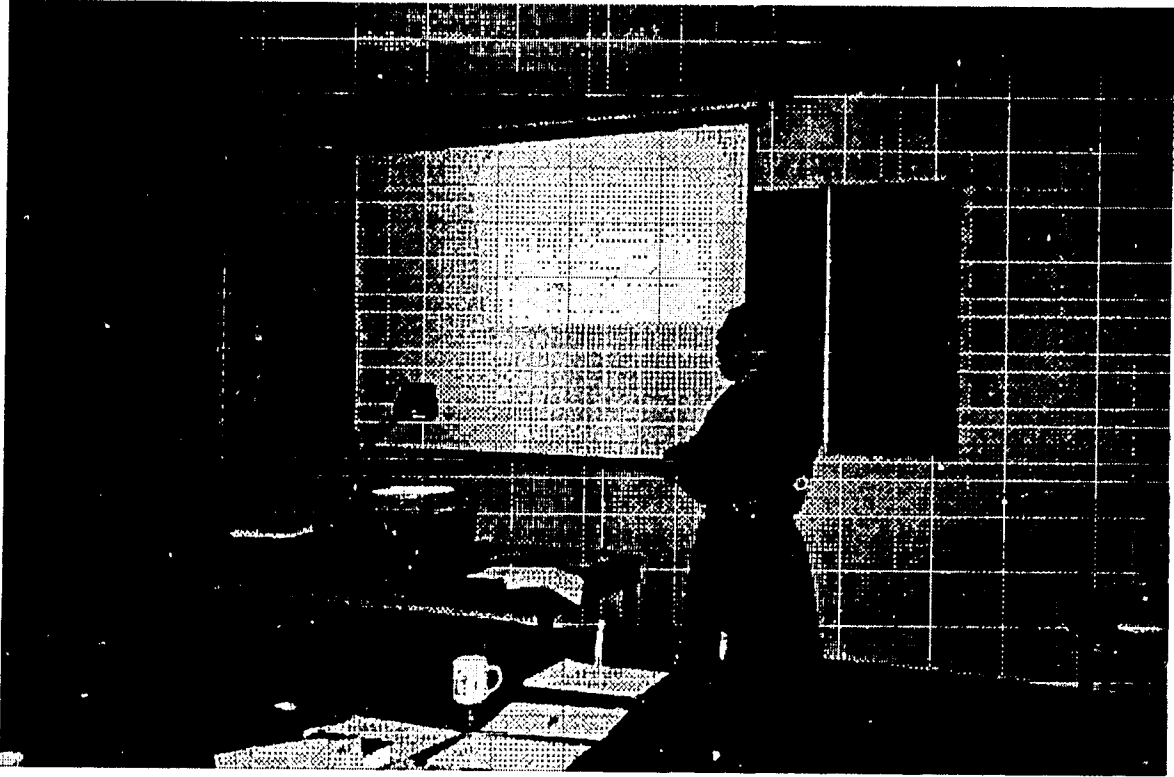


Hard at work on Year II planning



Sharing results at the end of each day

81



Martha Cooper introduces new import/export class



Cooper shares local expertise

-86




1900 Kenny Road  
Columbus, Ohio 43210-1090

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

CA

### MEMORANDUM

**TO:** Entrepreneurship Institutes in Poland - American Consultants  
Martha Cooper  
Gene Gomolka  
Gerry Hills  
Lynn Neeley  
Vicki Rash  
Randy Rollinson

**FROM:** Rod Terminello 

**DATE:** August 4, 1992

**RE:** August 17 - 21 Training in Columbus

For this training and meetings, please bring all your ideas and materials for making improvements to your respective courses. The exception is Martha Cooper as she is beginning the new course "Export Marketing".

In addition, please bring with you all your ideas and materials for course activities and applications.

Please find enclosed a copy of the week's schedule.

To Gene - when you arrive in Columbus on Sunday, August 16, you can call the University Parke Hotel for a shuttle to bring you to the hotel. The number is 267-1111.

To Gerry, Lynn and Randy - Dan Mertz will meet you at the airport Monday, August 17 and bring you to CETE. We have scheduled the meetings for your direct participation to start near 11:00 am and into the afternoon on the 17th.

Thank you for your cooperation. See you all on the 17th.

87



September 2, 1992

To: Staff and Consultants

From: Cathy Ashmore

CA

Re: Travel

OSU has changed the travel system effective September 15, 1992. We can not use Arlington Travel after that date, but can schedule travel in the future if all paperwork has been submitted by September 14.

Effective September 15 all travel should go through one of the following offices:

University Travel Management	(Campus office of Omega Travel)
Crystal Johnson	614-292-6242      930 Lincoln Tower
	800-356-6342
	800-876-6342 (Emergency 24 hour service)

Access to Travel, INC	
Betty Williams, Mgr	
Connie, International	
	614-841-1505      8000 Ravines Edge Ct.
	800-777-1505      Worthington, OH 43235

Your World of Travel	
Bill or Bridget	
	614-863-1984
	800-874-5943

If you have already made reservations with Arlington be sure that we get the information in time to process the paperwork. If not I would recommend Access to Travel because they are an existing agency and very anxious to serve. Crystal Johnson is not ready to do business until the 15th. After that it may be easier to work through her.

Attached is a profile that Crystal and Betty Williams would like to have on file. Please remember that for AID travel we have to use an American carrier. Ask the agent to send the itinerary to us so the paperwork can be processed.

Please let me know if there are any problems. We can move around within the three agencies and will want to see what your experience is with them.

CB

## Polish Scholars

**Fundacja Gospodarcza  
NSZZ Solidarnosc  
Waly Piastowskie 24  
80-855 Gdansk, POLAND  
Office #: 48-58-38-43-19 or 18  
Fax #: 48-58-38-42-19**

- **Malgorzata Balkowska  
ul. Wajdeloty 23/6  
Gdansk - Wrzeszcz 80-437, POLAND  
Home #: 48-58-41-50-06**
- **Alicja Unterschuetz  
ul. Oskara Kolberga 4C/32  
Sopot, POLAND  
Office #: 48-58-38-43-18  
Fax #: 48-58-38-42-19**

**Polsko-Amerykanski Instytut Przedsiębiorczosci  
ul. Zygmuntowska 2A  
35-030 Rzeszow, POLAND  
Office #: 48-17-394-17**

- **Adam Goral  
ul. Z.M.P. 15/77  
35-310 Rzeszow, POLAND  
Office #: 48-17-337-39  
Fax #: 48-17-353-71 or 48-17-323-82  
Home #: 48-17-657-147**
- **Krzysztof Kaszuba  
ul. Starzynskiego 11/17  
35-106 Rzeszow, POLAND  
Office #: 48-17-394-17**

**Białostocka Szkoła Biznesu Instytut Przedsiębiorczości**  
**ul. Wiejska 45E**  
**15-351 Białystok, POLAND**  
**Office #: 48-85-219-45**  
**Fax #: 48-85-219-45**

- **Andrzej Jurgilewicz**  
**ul. Rzymowskiego 38/51**  
**15-324 Białystok, POLAND**
- **Bogusław Plawgo**  
**ul. Bohaterów Getta 3/24**  
**15-450 Białystok, POLAND**

**Polsko-Amerykański Instytut Przedsiębiorczości**  
**ul. Powstanców Wlkp. 16 p.1521**  
**60-964 Poznań, POLAND**  
**Office #: 48-61-699-261, ext. 11-95**

- **Walery Lach**  
**ul. Winogrody 137/1**  
**Poznań, POLAND**  
**Office #: Akademia Ekonomiczna**  
**48-61-699-261, ext. 16-44**  
**Home #: 48-61-203-456**
- **Zdzisław Krajewski**  
**Os. Wichrowe Wzgórze 13/135**  
**61-657 Poznań, POLAND**
- **Grzegorz Bartoszewicz**  
**Os. Rusa 76/10**  
**61-245 Poznań, POLAND**  
**Home #: 769-440**

**U. S. Consultants**

**Martha C. Cooper**  
Associate Professor of  
Marketing and Logistics  
The Ohio State University  
1775 College Road  
614-292-5761  
Fax: 614-292-0440  
email cooper.7@osumail  
or cooper.7@osu.edu

**Gene Gomolka**

**Gerald E. Hills**  
University of Illinois-Chicago  
Office of Entrepreneur Studies M/C 244  
601 South Morgan  
628 University Hall  
P.O. Box 4348  
Chicago, IL 60680-4348  
Phone #: 312-996-2670  
Fax #: 312-413-1265

**Lynn N eeley**  
Northern Illinois University  
Management Department  
122 H Wirtz Hall  
DeKalb, IL 60115  
Office #: 815-753-6314  
Fax #: 815-753-8515

**Randy Rollinson**  
University of Illinois-Chicago  
5922 N. Nickerson Street  
Chicago, IL 60631  
Phone #: 312-922-8707

**Center on Education and Training for  
Employment**  
The Ohio State University  
1900 Kenny road  
Columbus, OH 43210-1090  
Office #: 614-292-4353 or 800-848-  
4815  
Fax #: 614-292-1260

**Piotr Korynski/Elzbieta Jacowicz**

**Rod Terminello**

**Vicky Rash**

## **Agenda**

**August 17, 1992**

**Overview**

**Background of Team**

**International Entrepreneurship Course**

**Course Overview**

**Course Competencies**

**Specific Units**

**Issues for Course Development and Execution**

**Experience of Participants**

**What Depth to Cover on Specific Topics?**

**Level of Specificity of Exercises**

**Use of Outside Speakers**

92

## International Entrepreneurship Course

### Overview

Business managers are increasingly involved in international trade by either importing or exporting products or materials for manufacturing. This course is intended to help business managers to assess and plan for basic differences between sourcing and marketing in the home country and in other countries around the world, including culture, common business practices, taboos.

Participants will analyze potential markets for size, penetrability, potential competition, profitability, in short an environmental analysis on the viability of exporting to specific markets. They will then develop an exporting strategy involving selection of specific markets to enter, product configuration, pricing, promotion, and distribution network. An important part of any international trade strategy is determining the methods of goods movement. Participants will assess the advantages and disadvantages of different distribution alternatives and constraints.

The course will draw on business skills from the other business courses with emphasis on differences between domestic and international trade.

#### Strategic Planning

Differentiate among the methods of international trade, such as direct foreign investment, exporting, licensing

#### Marketing

Use the marketing strategy framework for developing an international marketing strategy.

#### Management

Assess the legal, personnel differences needed for international trade.

#### Accounting/finance.

Define international banking terminology. Assess potential affects of international finance on the exporter. Execute the basics of obtaining proof of payment, e.g., letter of credit.

**International Entrepreneurship Course**  
**Competencies**

Business managers attending this course should be able to:

1. Identify the major differences between domestic and international trade.
2. Describe potential effects of macro issues on the viability of importing and exporting.
3. Evaluate the potential advantages/disadvantages of exporting to a specific market.
4. Assess any needed adaptations of a specific product for selected markets.
5. Indicate potential options for promoting in different cultural markets.
6. Define the considerations for setting prices in a foreign market. Assess potential effects of international finance on importing or exporting.
7. Evaluate the different goods movement and storage options.
8. Assess the advantages of and disadvantages of different distribution alternatives and constraints.
9. Determine methods of establishing good business relationships, including partnerships and joint ventures.
10. Know where and how to obtain assistance in the home country and other countries.

**International Entrepreneurship Course**  
**Syllabus**

- I. Introduction**
  - A. The Nature of International Marketing -  
How is it different from domestic marketing?**
  - B. Patterns in International Business -  
The Global Competitive Arena**
  - C. Significance and benefits of international trade -  
Why Export or Import?**
  - D. Marketing in the European Community and Elsewhere**
- II. Macro Environmental Issues**
  - A. Economic**
  - B. Political and Legal**
  - C. Cultural**
  - D. Technological**
- III. Formulating an Export Strategy - Examining Specific Markets**
  - A. Export Market Research and Analysis**
  - B. Define Target Markets - Assessing Target Market  
Alternatives**
  - C. Determine Marketing Mix - product, price, promotion,  
distribution**
- IV. Product analysis**
  - A. International Standardization versus Differentiation**
  - B. Adaptations to meet international target market needs and  
wants**
  - C. Product Advantages**
- V. Communications Strategy**
  - A. Identify Available Communications Alternatives**
  - B. Develop the Communications Strategy**

95



**VI. International Pricing Strategy**

- A. Export Pricing Approaches**
- B. Pricing, quotation, and terms of sale**
- C. International banking facilities**
- D. Barter and countertrade**

**VII. Channels of Distribution**

- A. Direct - Doing It All Yourself**
- B. Indirect Alternatives**

**VIII. International Goods Movement**

- A. Transportation**
- B. Inventory Management**
- C. Customs**
- D. Documentation**
- E. Insurance**
- F. Packaging**
- G. Third Party Services - brokers, import agents**

**IX. Establishing Good International Business Relationships**

- A. Kinds of Relationships**
- B. Mutual Benefits**
- C. Risk Considerations**
- D. Maintaining Relationships**

**Appendix A: Sources of Assistance**

- 1. Government agencies**
- 2. Private agencies**
- 3. Third party distribution companies - freight forwarders, brokers**
- 4. Secondary sources - libraries**

## International Entrepreneurship Course

### Unit 1: Introduction to International Entrepreneurship

#### Competency:

Identify the major differences between domestic and international trade.

#### Unit Outline:

- I. The Nature of International Marketing -  
How is it different from domestic marketing?
- II. Patterns in International Business -  
The Global Competitive Arena
- III. Significance and benefits of international trade -  
Why Export or Import?
- IV. Marketing in the European Community (and elsewhere)

## International Entrepreneurship Course

### Unit 2: Macro Environmental Issues

#### Competency:

Describe potential effects of macro issues on the viability of importing and exporting.

#### Unit Outline:

##### I. Economic

A. World/Regional Economic Conditions

B. International Agreements

C. International Financial System

1. Exchange Rates

2. International Banking

3. International Monetary Fund, The World Bank

##### II. Political and Legal

A. Regulations

B. Standards

C. Stability

##### III. Cultural

##### IV. Technological

98

## International Entrepreneurship Course

### Unit 3: Formulating an Export Strategy and Examining Specific Markets

#### Competency:

Assess the firm's internal capabilities for international trade.

Evaluate the potential advantages/disadvantages of exporting to a specific market.

#### Unit Outline:

- I. Export Market Research and Analysis
  - A. Cultural Differences and Cultural Change
  - B. Market Size
  - C. Economic stability
  - D. Political stability
  - E. Competition for the Market
  - F. Reachability -Market Access and Entry Process/Trade Barriers
    1. Customs - rates of duty, special preferences, marking, packing and labeling requirements
    2. Government Regulations - quantity restrictions (quotas), health and safety regulations
  - G. Profit Potential
- II. Define Target Markets - Assessing Target Market Alternatives
  - A. Actionable
  - B. Accessible
  - C. Measurable
  - D. Substantive
- III. Determine Marketing Mix - Product, Price, Promotion, Distribution

**International Entrepreneurship Course**

**Unit 4: Product Analysis and Strategy**

**Competency:**

**Assess any needed adaptations of a specific product for selected markets.**

**Unit Outline:**

- IV. International Standardization versus Differentiation**
- V. Product Adaptations**
- VI. Product Advantages**

100

## International Entrepreneurship Course

### Unit 5: International Communications Strategy

#### Competency:

Indicate potential options for promoting in different cultural markets.

#### Unit Outline:

- I. Identify Available Communications Alternatives
- II. Develop the Communications Strategy
  - A. Define the Message
  - B. Select the Medium

## International Entrepreneurship Course

### Unit 6: International Pricing Strategy

#### Competency:

Define the considerations for setting prices in a foreign market. Assess potential affects of international finance on importing or exporting.

#### Unit Outline:

- I. Export Pricing Approaches
- II. Pricing, Quotation, and Terms of Sale
- III. International Banking Facilities
  - A. Foreign Exchange
  - B. International Commercial Payments - Cash, Open Account, Bill of Exchange, Letters of credit
  - C. Foreign Collections, Credit Guarantees
- IV. Barter and Countertrade

## International Entrepreneurship Course

### Unit 7: Channels of Distribution

#### Competency:

Assess the advantages of and disadvantages of different distribution alternatives and constraints.

#### Unit Outline:

#### I. Direct - Doing It All Yourself

A. Multinational Human Resource Management

B. Manufacturing Location Decisions

#### II. Indirect Alternatives

A. Channel Intermediaries - importers, wholesalers, industrial distributors

B. Licensing



**International Entrepreneurship Course**

**Unit 8: International Goods Movement**

**Competency:**

Evaluate the different goods movement and storage options.

**Unit Outline:**

- I. Transportation
- II. Inventory Management
- III. Customs
- IV. Documentation
- V. Insurance
- VI. Packaging
- VII. Third Party Services - brokers, import agents...

## International Entrepreneurship Course

### Unit 9: Establishing Good International Business Relationships

#### Competency:

Determine methods of establishing good business relationships, including partnerships and joint ventures.

#### Unit Outline:

- I. Kinds of Relationships
  - A. Arm's Length
  - B. Partnership
  - C. Joint Venture
- II. Mutual Benefits
- III. Risk Considerations
- IV. Maintaining Relationships

105

**TABLE 8.2 • International Marketing Questions Determining Information Requirements****Broad Strategic Issues**

- What objectives should be pursued in the foreign market?
- Which foreign market segments should the firm strive to satisfy?
- Which are the best product, place/distribution, pricing, and promotion strategies for the foreign market?
- What should be the product-market-company mix to take advantage of the available foreign marketing opportunities?

**Foreign Market Assessment/Selection**

- Do opportunities exist in a foreign market for the firm's products and services?
- What is the market potential abroad?
- Are there foreign markets that the firm can serve?
- What new markets are likely to open up abroad?
- What are the major economic, political, legal, social, technological, and other environmental facts and trends in a foreign country?
- What impact do these environmental dimensions have on the specific foreign market for the firm's products and services?
- Who are the firm's present and potential customers abroad?
- What are their needs and desires?
- What are their demographic and psychographic characteristics—disposable income, occupation, age, sex, opinions, interests, activities, tastes, values, etc.?
- What is their lifestyle?
- Who makes the purchase decisions?
- Who influences the purchase decisions?
- How are the purchase decisions made?
- Where are the products purchased?
- How are the products used?
- What are the purchase and consumption patterns and behaviors?
- What is the nature of competition in the foreign market?
- Who are major direct and indirect competitors?
- What are the major characteristics of the competitors?
- What are the firm's competitive strengths and weaknesses in reference to such factors as product quality, product lines, warranties, services, brands, packaging, distribution, sales force, advertising, prices, experience, technology, capital and human resources, and market share?
- What attitudes do different governments (domestic and foreign) have toward foreign trade?
- Are there any foreign trade incentives and barriers?
- Is there any prejudice against imports or exports?
- What are different governments doing specifically to encourage or discourage international trade?
- What specific requirements—for example, import or export licenses—have to be met to conduct international trade?
- How difficult are certain government regulations for the firm?
- How well developed are the foreign mass communication media? Are the print and electronics media abroad efficient and effective?
- Are there adequate transportation and storage/warehouse facilities in the foreign market?
- Does the foreign market offer efficient channels of distribution for the firm's products?

TABLE 8.2 • Continued

What are the characteristics of the existing domestic and foreign distributors?  
 How effectively can the distributors perform specific marketing functions?  
 What is the state of the retailing institutions?

#### Marketing Mix Assessment and Selection

##### Product

Which product should the firm offer abroad?  
 What specific features—design, color, size, packaging, brand, warranty, etc.—should the product have?  
 What foreign needs does the product satisfy?  
 Should the firm adapt/modify its domestic market product and sell it abroad?  
 Should it develop a new product for the foreign market?  
 Should the firm make or buy the product for the foreign market?  
 How competitive is or will be the product abroad?  
 Is there a need to withdraw the product from the foreign market?  
 At which stage in its life cycle is the product in the foreign market?  
 What specific services are necessary abroad at the presale and postsale stages?  
 Are the firm's service/repair facilities adequate?  
 What is the firm's product and service image abroad?  
 What patents or trademarks does the firm have that can benefit it abroad? How much legal protection does the firm have concerning patents, trademarks, etc.?  
 What should be the firm's product mission philosophy in the foreign market?  
 Are the firm's products socially responsible? Do the products create a good corporate image?

##### Price

At what price should the firm sell its product in the foreign market?  
 Does the foreign price reflect the product quality?  
 Is the price competitive?  
 Should the firm pursue market penetration or market-skimming pricing objectives abroad?  
 What type of discounts (trade, cash, quantity) and allowances (advertising, trade-off) should the firm offer its foreign customers?  
 Should prices differ with market segment?  
 What should the firm do about product line pricing?  
 What pricing options are available if costs increase or decrease? Is the demand in the foreign market elastic or inelastic?  
 How are prices going to be viewed by the foreign government—reasonable, exploitative?

##### Place/Distribution

Which channels of distribution should the firm use to market its products abroad?  
 Where should the firm produce its products and how should it distribute them in the foreign market?  
 What types of agents, brokers, wholesalers, dealers, distributors, retailers, etc., should the firm use?  
 What are the characteristics and capabilities of the available intermediaries?  
 Should the assistance of EMCs (export management companies) be acquired?  
 What forms of transportation should the firm use?  
 Where should the product be stored?  
 What is the cost of distribution by channel?  
 What are the costs of physical distribution?  
 What type of incentives and assistance should the firm provide its intermediaries to achieve its foreign distribution objectives?

(continued)

107

TABLE 8.2 | Continued

Which channels of distribution are used by the firm's competitors and how effective are these channels?

**Promotion—Nonpersonal (Advertising and Sales Promotion)**

How should the firm promote its products in the foreign market? Should it advertise? Should it participate in international trade fairs and exhibits?

What are the communication needs of the foreign market?

What communication or promotion objectives should the firm pursue abroad?

What should be the total foreign promotion budget?

What advertising media are available to promote in the foreign market? What are their strengths and limitations? How effective are different domestic and foreign advertising media?

Should the firm use an advertising agency? How should it be selected?

How effective and competitive are the firm's existing advertising and promotion programs concerning the foreign market?

What are the legal requirements?

Are there foreign laws against competitive advertising?

**Promotion—Personal Selling**

Is there a need for personal selling to promote the product abroad?

What assistance or services do foreign customers need from the sales force?

What should be the nature of personal selling abroad?

How many salespeople should the firm have?

How should the sales personnel be trained, motivated, compensated, assigned sales goals and quotas, and assigned foreign territories?

What should the nature of foreign sales effort be?

How does the firm's sales force compare with its competitors?

What criteria should the firm use to evaluate sales performance?

How should the firm perform sales analysis?

Source: Vinay Kothari, "Researching for Export Marketing," From *Export Promotion: The Public and Private Sector Interaction*, edited by Michael R. Czinkota, pp. 169–172, 1983.

## **U.S. Government**

Of all the sources, the U.S. government has the greatest variety of data available. Most of them are collected by the Department of Commerce, the Department of Agriculture, the Department of State, the Department of the Treasury, and by U.S. embassies abroad.

Typically, the information provided by the U.S. government addresses either macro or micro issues, or it offers specific data services. Macro information includes population trends, general trade flows between countries, and world agricultural production. Micro information includes materials on specific industries in a country, their growth prospects, and their foreign trade activities. Specific data services might provide custom-tailored information responding to the detailed needs of a firm. More information on selected U.S. government publications and research services is presented in Appendix B to Chapter 8. The International Marketplace 8.2 provides an example of how the U.S. government is attempting to assist U.S. firms abroad with information and research services.



Department of Marketing

1775 College Road  
Columbus, OH 43210-1399

Phone 614-292-8808  
FAX 614-292-0879

September 1, 1992

Mr. Steve Knepp  
Fritz Companies, Inc.  
5139 S. Ridge Parkway, Suite 100  
Atlanta, Georgia 30349  
404-994-3100

Dear Mr. Knepp:

Thank you for taking time to speak with me regarding your trip to Poland. As you requested, here is some information about the project currently under way.

The Center on Education and Training for Employment (CETE) at The Ohio State University has a grant from U.S. AID to assist small Polish entrepreneurs to expand their businesses. During the past year, three management training centers have been established in Bialystok, Posnan, and Rzeszov. Each has approximately fifteen faculty members from nearby universities teaching a set of five courses in management, entrepreneurship, accounting/finance, marketing, and strategic planning.

In the second year of funding, a sixth course has been added on exporting and importing. We are working to improve the capacity of the faculty for teaching such a course and to increase international trade among the entrepreneurs. Professor Krzysztof Kaszuba and I are responsible for developing this course. It is in this regard that I am writing for your help. We are interested in knowing about resource people, resource materials, and government trade processes that should be used in developing the course.

The course is primarily designed to help those attending to begin exporting or importing and secondarily to expand current international efforts. A major objective of the course is to be practical and immediately useful to the entrepreneurs attending the course. It will be taught in Polish.

I have spoken with David Luce who teaches the Fritz importing course in the U.S. He was most helpful. He feels that having actual examples for both importing and exporting would add realism to the course. Hopefully these example companies could also be used for other parts of the course, such as deciding on markets for exporting. We would use these examples throughout the course wherever appropriate. A proposed syllabus for the course is attached.

Therefore, we need examples specific to Poland to show how to get products imported and exported. Since we can't look at the whole world at once, we have chosen to focus on exporting from Poland to the U.S. and importing from the Far East into Poland. At a meeting with eight coordinators of the program in Columbus, Ohio, in August, we decided to emphasize operations to and from the Polish border in terms of paperwork and goods movement since freight forwarders and customs brokers would probably handle the task beyond the border. The entrepreneurs should be aware of the process and possible difficulties of goods movement to the final destination but these would be discussed more generally during the course.

Another area in which we would like assistance is speakers for the classes. Someone from the government, such as in the international trade area, could advise on how the government could help entrepreneurs. Someone from the U.S. Trade Development Center could discuss how to facilitate trade with the U.S.

The initial year of course offerings has been well-received. We would like to make this course a strong addition to the curriculum.

To summarize, any help would be appreciated regarding:

1. Copies of rules and forms required for importing from the Polish border to each of the three cities or Warszawa.
2. Copies of rules and forms required for exporting from each of the three cities or Warszawa to the Polish border.
3. A specific example of a company, preferably small, that exports from Poland to the United States.
4. A specific example of a company, preferably small, that imports from the Far East to Poland.
5. Sources of materials for determining
  - costs for transporting and distributing goods
  - market potentials, especially the U.S., Far East, and Economic Community.
  - relevant regulations - e.g., customs, tariffs, quotas
6. Copies of any of these resources that could be provided to the three management training centers as references for the professors and for in-class exercises.
7. Speakers on the following topics. The courses will be offered in all three locations on an ongoing basis.
  - a. Help available from the Polish government.
  - b. Help available from the U.S. government.

- c. Freight forwarder services available.
  - d. Commercial banking aspects of exporting and importing.
8. A list of joint ventures currently operating in Poland. There is great interest in forming joint ventures by the entrepreneurs.

I understand that you will be meeting with:

Mr. Jan Krzysztof Bielecki  
Head of Parliament and  
Chair of the Liberal Democratic Party

The Minister of Trade

Ms. Joan Edwards  
Sr. Commercial Trade Officer  
U.S. Trade Development Center  
Warszawa  
48 22 214 515

We will be in Rzeszow November 11-14, 1992, to train the professors of the three management training institutes for the export/import course. Professor Kaszuba is the coordinator in Rzeszow. We would appreciate having someone from the Ministry of Trade and the U.S. Trade Development Office speak to the group of 15-45 professors during this session. Professor Kaszuba would be the person scheduling these speakers.

Professor Kaszuba is working from Poland while I am working from the U.S. Materials can be sent to either of us, depending on convenience.

Thank you for your assistance.

Sincerely,



Martha C. Cooper  
Associate Professor of  
Marketing and Logistics

111 -



Martha C. Cooper  
Associate Professor of  
Marketing and Logistics  
The Ohio State University  
1775 College Road  
Columbus, Ohio 43210  
614-292-5761  
FAX 614-292-0440  
email cooper.7@osumail  
or cooper.7@osu.edu

cc: Catherine Ashmore, CETE  
1900 Kenny Road  
Columbus, Ohio 43210  
01-614-292-4353  
01-614-292-1260 (fax)  
01-800-848-48159

Malgorzata Balkowska  
Fundacja Gospodarcza  
NSCC Solidarnosc  
Waty Piastowskie 24  
80-855 Gdansk  
Poland  
tel. 31-40-51  
38-43-19  
38-44-12  
tlx. 51-31-60  
fax. 38-42-19

Krzysztof Kaszuba  
Director of Polish-American Entrepreneurship Institute  
35-030 Rzeszow  
ul. Zygmuntowska 2A  
Poland  
0-17-394-17  
0-17-353-71 (fax)  
0633339 (tfx)

BOOK LIST

Number One

TITLE	AUTHOR	PRICE	PUBLISHER	QUANTITY
How to Export	Roger Fritz	\$26.95	Probus Publishing	3
How to Make a Fortune in Import/ Export	Howard R. Goldsmith	\$28.95	A Reston Book Prentice-Hall	3
The Global Negotiator	T Griffin, W.R. Dagatt	\$12.00	Harper Business	3
The Wall Street Journal Guide to Understanding Money and Markets		\$13.95	Access Press Publication	3
The Only Other Investment Guide You'll Ever Need	Andrew Tobias	\$ 9.95	Bentam Books	3
Guide to Starting Your Own Import-Export Business	Karen Offitzer	\$ 8.95	Citadel Press Book	3
Building An Import/Export Business	Kenneth D. Weiss	\$ 8.95	John Wiley & Sons	3
Tourism Marketing	Michael M. Coltman	\$36.95	Van Nostrand Reinhold, NY	3
		Total = 146.65		
		x 3 = 439.95		

113

**BOOK LIST**  
Number Two

TITLE	AUTHOR	PRICE	PUBLISHER	QUANTITY
The Complete Negotiator	Gerrard J. Nierenberg	\$ 8.95	Berkley Books, NY	3
Do It Yourself - Advertising	David F. Rauscitti	\$18.95	Amacom	3
Getting Past No - Negotiating with Difficult People	Lilliam Ury	\$20.00	Bantam Books	3
You Can Negotiate Anything	Herb Cohen	\$ 6.95	Bantam Books	3
The Entrepreneur's Handbook	Richard H. Buskirk	\$30.00	Premiere Entrepreneurs Program	3
Total Business Planning	E. James Burton W. Blan McBride	\$19.95	Wiley	3
The Art of Negotiating	Gerrald J. Nierenberg	\$ 5.99	Pocket Books	3
Advertising - What It Is and How to Do It	Roderick White	\$12.95	McGraw Hill	3
How to Write a Business Plan	Mike McKeever	\$17.95	Nolo Press Self-Help Law	3
		Total = 141.69 x 3 = 425.07		

114

**BOOK LIST**  
Number Three

				<b>QUANTITY</b>
<b>The Banker's Handbooks</b>	<b>William H. Baughn Thomas I. Storrs Charles Walker</b>	<b>Dow Jones-Irwin</b>	<b>\$75.00</b>	<b>3</b>
<b>Dictionary of Banking Terms</b>	<b>Thomas P. Fitch</b>	<b>Baron's</b>	<b>\$10.95</b>	<b>3</b>
<b>Retail Banking</b>		<b>The Institute of Financial Education</b>	<b>\$29.95</b>	<b>3</b>
<b>Fundamentals of Negotiating</b>	<b>Gerrard J. Nierenberg</b>	<b>Harper &amp; Row</b>	<b>\$8.95</b>	<b>3</b>
<b>Economic Behavior and Institutions</b>	<b>Thraim Eggerstsson</b>	<b>Cambridge University Press</b>	<b>\$18.95</b>	<b>3</b>
<b>Marketing Without Advertising</b>	<b>Michael Phillips, Salli Rasberry</b>	<b>Nolo Press</b>	<b>\$19.00</b>	<b>3</b>
<b>Writing a Business Plan that Gets Results</b>	<b>Michael O'Donnell</b>	<b>Contemporary Books</b>	<b>\$11.95</b>	<b>3</b>
			<b>Total = 174.75</b>	<b>3</b>
			<b>x 3 = 524.25</b>	<b>3</b>

115

BOOK LIST  
Number Four

TITLE	AUTHOR	PRICE	PUBLISHER	Quantity
Management Information Systems	Larry Long	\$55.50	Prentice Hall	1
CASE Using Software Development Tools	Alan G. Fisher	\$27.95	Wiley	1
Information Systems Architecture	W. H. Inman Jeffrey H> Caplan	\$44.95	QED Publishing Group	1
Open Systems: A Business Strategy	Pamela Gray	\$40.95	Mc-Graw Hill	1
		Total \$169.35		

Grand Total \$1,558.62

116.

**BOOK LIST  
Number Five**

				<b>QUANTITY</b>
<b>Cases In Advertising Management</b>	<b>Terrence Nevett</b>	<b>#N3368-4</b>	<b>3 @ \$24.95 = \$74.85</b>	<b>3</b>
<b>Sales Promotion Essentials Second Edition</b>	<b>Don E. Schultz</b>	<b>#N3367-6</b>	<b>3 @ \$17.95 = \$53.85</b>	<b>3</b>
<b>Promotional Marketing Ideas and Techniques for Successs in Sales Promotion</b>	<b>William A. Robinson Christine Hauri</b>	<b>#N3150-9</b>	<b>3 @ \$39.95 = \$119.85</b>	<b>3</b>
<b>Readings and Cases in Direct Marketing Solutions Manual (No Charge)</b>	<b>Herbert E. Brown Bruce Buskirk</b>	<b>#N3183-5</b>	<b>3 @ \$24.95 = \$74.85</b>	<b>3</b>
<b>The Art of Writing Advertising</b>	<b>Denis Higgins</b>	<b>#N3100-2</b>	<b>3 @ 9.95 = \$29.85</b>	
<b>Stratgegy In Advertising</b>	<b>Leo Bogart</b>	<b>#N3098-7</b>	<b>3 @ \$17.95 = \$53.85</b>	
			<b>Total = \$407.10 less 25% discount \$101.77 = \$305.33</b>	

117

**BOOK LIST**  
**Number Six**

<b>TITLE</b>	<b>AUTHOR</b>	<b>PRICE</b>	<b>PUBLISHER</b>	<b>STORE</b>
<b>Foreign Trade Barriers</b>	<b>Department of Commerce</b>	<b>\$ 8.50</b>	<b>US Government Printing Office</b>	
<b>International Marketing</b>	<b>Czinkota</b>	<b>\$50.00</b>	<b>The Dryden Press</b>	
<b>International Business</b>	<b>Czinkota</b>	<b>\$50.00</b>	<b>The Dryden Press</b>	
<b>The Export Trading Company Guidebook</b>	<b>Department of Commerce</b>	<b>\$ 8.50</b>	<b>Government Printing Office</b>	
<b>Importing into the United States</b>	<b>Department of The Treasury United States Customs Service</b>	<b>\$ 6.50</b>	<b>Government Printing Office</b>	

118

# Books Sent to Poland

Updated 8-5-92

Houghton Mifflin Software, School & College Div.

*Business Strategy & Policy, 3rd ed.*  
Smith, Bizzell & Arnold

*Tempomatic IV: A Management Simulation 3rd ed.*  
Scott & Strickland

*Small Business Management 4th ed.*  
Siropolis

**Irwin**

*Economic Perspective*  
Streifford

**MacMillan**

*Effective Small Business Management 3rd ed.*  
Scarborough & Zimmerer

**McGraw-Hill**

*Statistics for Business & Economics*  
Sandy

*Economics 13th ed.*  
Samuelson & Nordhalus

*Starting & Managing the Small Business. 2nd ed.*  
Kuriloff & Hemphill

*Management*  
Koontz & Weirich

*Principles of Corporate Finance 4th ed.*  
Brealey & Myers



## South-Western

*Strategic Retail Management: A Lotus 1-2-3- Based Simulation*  
Gifford

*Basic Advertising*  
Jugenheimer & White

*Small Business Management 8th ed.*  
Longenecker & Moore

*Franchising*  
Justis & Judd

*Strategic Planning In The Small Business*  
Stoner & Fry

## Misc. Publishers

*Competitive Advantage: Creating & Sustaining Superior Performance*  
Porter  
Free Press

*Clients & Consultants: Meeting and Exceeding Expectations*  
Bell & Nadler  
Gulf Publishing Co., Book Div.

*Competition in Global Industries*  
Porter  
Harvard Business School Press.

*Computers & Mathematics: The Use of Computers in Undergraduate Instruction*  
Smith, Porter, Leinbach & Wegner  
Mathematical Assoc. of America

*Running Unix: An Introduction to SCOS*  
Woodcock  
MicroSoft Press

*The Successful Business Plan: Secrets & Strategies*  
Abrams  
Oasis Press

*Negotiating a Bank Loan (You Can Live With!)*

Pulis

Probus Publishing Company

*International Dimensions of Organizational Behavior 2nd ed.*

Adler

P W S-KENT

*Survey Research by Telephone 2nd, rev.ed. (Library of Social Research: Vol. 150)*

Frey

Sage Publications

*Entrepreneurial Behavior*

Bird

Scott Foresman

*Accounting: The Language of Business*

Davidson, Stickney & Weil

Thomas Horton & Co.

*New Venture Creation*

Timmons

Upstart

### **BOOKS NOT LISTED BY PUBLISHER (OSU BOOKSTORE)**

*Accounting Texts & Cases*

Anthony & Reece

*Basic Financial Management*

Martin

*Basic Financial Management, Study guide*

Martin

*Strategic Formulation & Implementation*

Strickland

*Human Resource Management*

Schuler

*Economics of Money, Banking, & Finance*

Mishkin

*Marketing Game*  
Mason

*Marketing Research*  
Acker

*Sales Management*  
Futrell

*Marketing Research in a Marketing Environment*  
Futrell

*Organizational Behavior*  
Steers

*Principles of Financial Managemnt*  
Winger

*Marketing*  
Skinner

*Marketing Management*  
Kotler

**BOOKS NOT LISTED BY PUBLISHER (BORDERS BOOKSTORE)**

*The Competitive Advantage of Nations & Their Firms*  
Porter, Michael E.  
Free Press

*Grit, Guts & Genius: True Tales of Megasuccess: Who Made Them Happen & How They Did It*  
Hillkirk & Jacobson  
Houghton Mifflin Software, School & College Div.

*The Successful Marketing Plan*

*Opening Your Own Retail Store*

*Consulting For Success*

*How to Start & Run a Profitable Restaurant*

122

# BOOK REQUEST

Title	Author	Price
Publisher	Store	
Title	Author	Price
Publisher	Store	
Title	Author	Price
Publisher	Store	

Submitted by \_\_\_\_\_

Page \_\_\_ of \_\_\_

123

**Export-Import by Cooper                      October 29, 1992**

International Marketing by Czinkota and Ronkainen

Pages 48-183, 210-265, 296-309, 358-377, 384-416, 600-637, and 700-721.

I.M. Manual: Pages 19, #3; page 39, #1; transparencies 20, 26-28, 30, 35, 42-45, 52, 56, 63, and 64.

International Business by Czinkota and Ronkainen

Pages 16-30, 108-153, 175-197, 224-240, 268-292, 380-471.

I.B. Manual: Pages 12 #1; pp. 25-2-6 #1-4, 6, 9, 10; p. 39 #5; p. 46 #5; p. 49; p. 51 #1-3; p. 60 #10,11; p. 68-69 #6-8; p. 71-75 #1-8; p. 81-83 #1-8; p. 86-89 #1-7; p. 91; p. 92 #1-3; p. 104 #6; transparencies (TM): 3, 4, 10, 12, 14, 15, 17, 21, 23, 26, 36, 38, 41, 42, 43, 44, 45, and 47.

Strategic Planning for Logistics by Cooper, Innis, Dickson.

International Marketing by Kramer.

Profitable Export Marketing by Ortiz-Buonafina.

"Exporting to the United States: Management Implications for Small Manufacturers" by Kirpalani and Rosson in Business Quarterly.

"Planning Strategies Without Data: A European Case Study" by Cooper and Byrne.

"Countertrade as an Export Strategy" in The Journal of Business Strategy.

Export Promotion: The Public and Private Sector Interaction edited by Michael Czinkota.

"Building Blind" in Canadian Business.

"Transcending Business Boundaries: 12,000 World Managers View Change" by Kanter in Harvard Business Review.

Contemporary Advertising by Bovee.

Principles of Marketing by Kotler.

European Trade Fairs: A Key to the World for U.S. Exporters by U.S. Department of Commerce, International Trade Administration.

Marketing Challenges: Cases and Exercises and Instructor's Manual by Lovelock and Weinkerg.

The Right Choice video by The Holland Distribution Council.

Your Passport to Export by Muller and McCue.

124

**Cooper continued**

"Resource Guide to Doing Business in Central and Eastern Europe" by the U.S. State Department Bureau of Public Affairs, Office of Public Communication, Washington, D.C.

The Wall Street Journal on Marketing by Alsop and Abrams.

"Rediplant" by Simmons in Marketing Challenges: Cases and Exercises.

**Strategic Planning by Rollinson**

**October 29, 1992**

Strategic Planning for the Small Business by Stoner and Fry.

Boards of Directors and the Privately Owned Firm: A Guide for Owners, Officers, and Directors by Ford.

"Distinctive Competence: A Marketing Strategy for Survival" by Thomas Neil in Journal of Small Business Management.

"Do Boards of Directors Really Help Small Businesses?" by Danco and Ford in Small Business Forum.

Strategic Management: Concepts and Cases by Thompson, Jr. and Strickland III.

**Management by Gomolka**

**October 29, 1992**

Small Business Management and Entrepreneurship by Tate, Cox, Hoy, Scarpetto, and Stewart.

The Entrepreneur and Small Business Problem Solver by Cohen.

Negotiation: Readings, Exercises, and Cases by Lewicki and Litterer.





**APPENDIX**  
**3.0**

**ASSIST  
ENTERPRISE  
INSTITUTES**

# Bialystok

**BIAŁYSTOK  
SCHOOL  
OF BUSINESS** **BIB**

---

**POLAND, 15-351 Białystok, ul. Wiejska 45 E, tel./fax (48 85) 21-945**

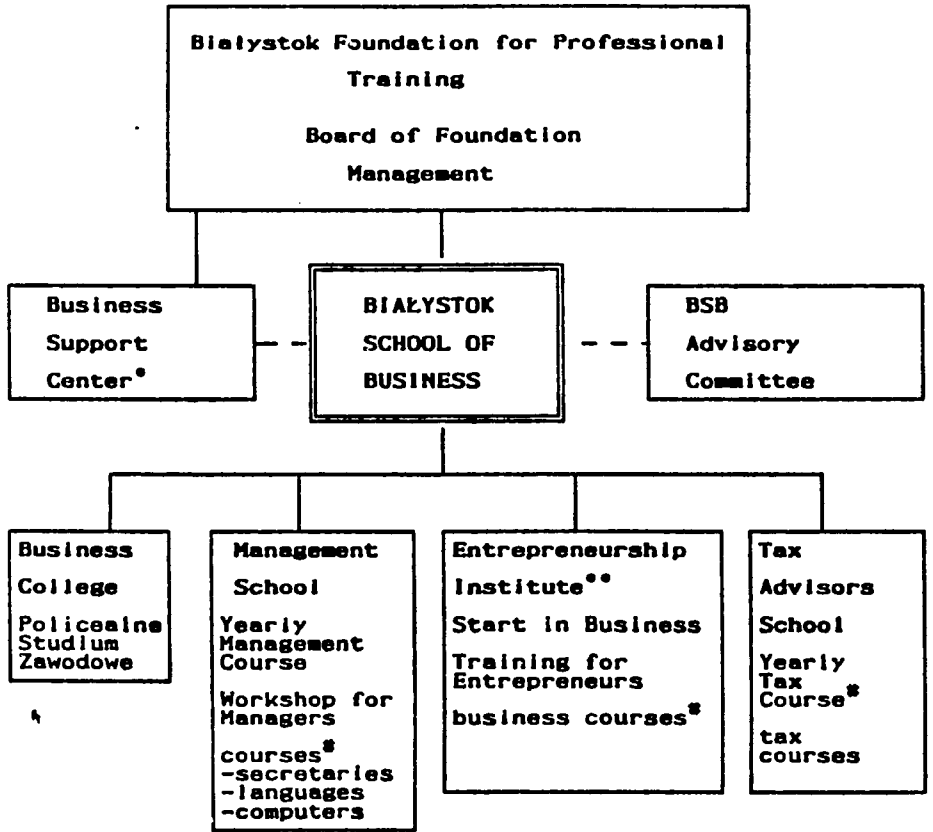
---

**INFORMATION**

---

Account number: PBK S.A. Warszawa I/O Białystok  
370406-206415-132-3

135



\* with Cooperation Fund in Warsaw and Chamber of Industry and Commerce in Białystok  
 \*\* with CETE The Ohio State University  
 \* planning undertakings

**BOARD OF FOUNDATION**

1. Lech Rutkowski, President of Białystok City
2. Mrek Sosnowski, V-ce President of Białystok City
3. Aleksander Usakiewicz, V-ce President of Białystok Voivodeship
4. Stanisław Srocki
5. Kazimierz Pleńkowski, Rector of Białystok Technical University
6. Tadeusz Cichoń, Prorector of Białystok Technical University
7. Mirosław Mironowicz, General Director of "Solidarity" Economic Foundation in Gdańsk
8. Biruta Klepacka, former Director of Białystok Regional Department of "Solidarity" Economic Foundation

**MANAGEMENT OF FOUNDATION**

1. Bogusław Pławgo - President
2. Andrzej Jurgilewicz - V-ce President
3. Barbara Czapla - Secretary of Foundation
4. Krzysztof Kulikowski
5. Jerzy Lisowski

**BIALYSTOK SCHOOL OF BUSINESS**

**Bogusław Pławgo - BSB Director**

**address to contact:**

**ul. Wiejska 45 E  
 15-351 Białystok  
 POLAND**

**Andrzej Jurgilewicz - Entrepreneurship Institute Director**

131.

Białystok School of Business is the main form of activity of Białystok Foundation for Professional Training, a training and consultancy organization.

The founders are: President of Białystok City, President of Białystok Voivodeship, Białystok Technical University and "Solidarity" Economic Foundation in Gdańsk.

BFPT is non-profit, non-government organization and it was established to meet the demands of practical management and business training.

The seat of BSB is in one of Białystok Technical University buildings.

### 1. BSB OBJECTIVES

The School's most significant task is to provide a professional education and consulting for small and medium enterprises, first time businessmen, present and prospective managers, prospective personal assistants. BSB promotes and prompts entrepreneurship development and builds strong relationship with the emerging private sector in north-eastern Poland. We are the only organization of that kind for this region.

### 2. ENTREPRENEURSHIP INSTITUTE

Since July 1991 BSB has been cooperating with The Center on Education and Training for Employment The Ohio State University. We work together on the project funded by U.S. Agency for International Development (U.S. AID).

The goal of this project is to establish three Entrepreneurship Institutes in Poland (Białystok, Poznań, Rzeszów) in order to encourage teaching of market economy education with emphasis on entrepreneurship, small and medium business management, marketing, finance and consulting. The strategy selected is to empower a group of faculty members to teach struggling new entrepreneurs in our region and to upgrade the competencies of these business owners to compete in a market economy.

American experts provided EI with new curriculum and teaching strategies that are used in business classes.

As a part of this project our staff was trained by American experts during Train-the-Trainer workshop and pilot test in Poznań (November-December 1991).

We worked out 43 "Success Stories" with local business owners. As a result of these questionnaires four films were shot in April 1992 (Schola, APA, Goniec Podlaski, Wilczewski).

The Grand Opening of Entrepreneurship Institute and The Banking Seminar for bank employees from our region was held in March 1992. It was a great opportunity to confront business owners' expectation towards creditors and vice versa during The Banking Seminar.

First National Entrepreneurship Forum was held on May 10-12th in Gdynia.

### 3. BSB STAFF

Our staff consists of 20 experts. Most of them come from Economic Faculty and Law Faculty of Warsaw University, Białystok Branch. We also invite visiting professors, local financial and legal institutions employees and local businessmen.

### 4. COURSES

4.1 "Start in Business" is developed for first time business owners, it takes 70 teaching hours. The first edition started in January '92. Since that time we have completed 3 editions and we plan four more for the period October '92 - June '93.

4.2 "Training for Entrepreneurs" is developed for small and medium business owners, it takes 150 teaching hours. The first edition started in March '92. We plan three more editions for the period October '92 - June '93.

4.3 "Yearly Management Course" is developed for postgraduate students and secondary schools graduates with professional experience. It takes 220 teaching hours. The first edition with two groups of 70 students started in February '92. They will continue their education after summer break. We plan to start one more edition with 30 students at the beginning of October '92.

4.4 "Workshop for Managers" is developed for managers from state owned and big private companies, it takes 110 teaching hours.

4.6 Tax courses. We have completed two tax courses.

4.7 Apart from above mentioned we will also organize courses to the orders of companies and Labour Bureau.

We have trained altogether 170 students since January '92.

## 5. BUSINESS COLLEGE

Business College is full time education developed for secondary schools graduates. 50 students will begin their 2-year education in the beginning of October '92. Our students will visit local companies during their education and they will have practical trainings in selected firms during next summer.

## 6. CONSULTING

We offer free consulting for participants of our courses and for unemployed. Since January '92 we have given more than 90 advices and consultancies.

We also offer consulting for business (there is a specialized consulting group).

## 7. ADVISORY COMMITTEE

Members of Białystok School of Business Advisory Committee are the most considerable local businessmen.

## 8. COOPERATION WITH LOCAL, NATIONAL AND INTERNATIONAL INSTITUTION

We cooperate with the following institutions:

- Białystok Chamber of Economics,
- Chamber of Commerce and Industry in Białystok,
- Labour Bureau in Białystok,
- local tax institutions,
- local universities,
- "Solidarity" Economic Foundation in Gdańsk,
- Cooperation Fund in Warsaw,
- The Ohio State University,
- SBK (Dutch consulting company which coordinates establishing Białystok Corporation for Regional Development),
- Grodno University (Byelorussia).

We also plan to cooperate with Minsk University (Byelorussia).

## 9. PROMOTION

Białystok School of Business issues its own "Information Bulletin" (every two weeks) and folders about courses it offers. We also have our own regular section in one of the main local newspapers and promote our activity in local radio and television.

We organized a reception for participants of our courses, members of BSB Advisory Committee, faculty members, local press and radio in mid of June '92. It was a great opportunity to exchange experiences between them.

MONTHLY REPORT

SEPTEMBER 1992

1. Translation and material development /"Entrepreneurship"/
2. Promotion
  - a/ cooperation with one of the local newspaper,
  - b/ edition of BSB Bulletin /topic: business plan/,
  - c/ advertaisings,
  - d/ mailing.
3. We organized course for entrepreneurs /September 28-30, 18 teaching hours/: finance and tax module

Instytut Małej Przedsiębiorczości  
*Jurgilewicz*  
Andrzej Jurgilewicz  
Dyrektor

4

PROGRAMM OF BIALYSTOK COURSES - ENTREPRENEURSHIP INSTITUTES

1. Entrepreneurs Training: 8.10.92-6.12.92 (on Thursdays and Fridays 4:30p.m. to 9:00p.m.; Saturdays 9:00a.m. to 11:00a.m.);
2. Business Start-Up: 12.10.92-21.11.92 (on Mondays and Tuesdays 4:00p.m. to 9:00p.m.).

Special courses:

- Finance and Taxes (18 hrs): 28-30.07.92, 5.11.92;
- Marketing-The World of Marketing (50 hrs): probably 5.11.92-4.12.92;
- Firm Promotion (60 hrs): 10.12.92-29.01.93

Madżonka: Badlewska (17)



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

Instytut Małej Przemysłowości

Andrzej Jurgilewicz  
Dyrektor

Institution: Białystok School of Business  
Entrepreneurship Institute  
Poland

Quarter: September

Contact Person Regarding  
this Report

Andrzej Jurgilewicz

Project  
Component

TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

**241**

Białostocka Szkoła Biznesu  
INSTYTUT PRZEDSIĘBIORCZOŚCI  
15-351 Białystok, ul. Wiołaba 45B  
tel./fax 219-45

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER <i>Business Conversation Club</i>	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Students (Traditional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Government Officials	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Business Community/ Business Managers	<input type="text" value="162"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="67"/>	<input type="text" value="3"/>	<u>Białystok</u>
Journalists - Media	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="2"/>	
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

COMMENTS:

etc

**Poznan**

Report from the activities Polono - American Institute  
of Enterprise during the months July to September.

1. Transfer of seat of Institute to the new building of Academy of Economy.
2. Organization of computer laboratory for the needs of schooling formation in the Institute.
3. Organization of schooling course for the employees of ~~Small Firms - Section - Poznań~~. /21 persons took part in this schooling formation/.
4. Preparation and printing of publicity materials for the needs of Institute.
5. Creation of new Regional Advisory Committee of Institute.  
President: Henryk Gawron - Professor.
6. Presentation of Realizations obtained by Institute during International Fair of Small Business - Poznań 93.
7. Preparation of 2<sup>nd</sup> ~~nd~~ edition of course for the owners of small firms.

Dyrektor Instytutu  
*[Signature]*  
dr Zdzisław Krolowski

**KURS: SKUTECZNE KIEROWANIE WŁASNĄ FIRMĄ W WARUNKACH  
KONKURENCJI / POZNAN**

CLASS SCHEDULE

DATA ZAJĘĆ	TEMAT	PROWADZĄCY	ILOŚĆ GODZIN	CZAS SKUMULOWANY
9-11.X	Prawo	dr J. Kufel	15	-
16-18.X	Prawo	dr J. Kufel	15	30
23-25.X	Finanse	dr R. Mikołajczak dr W. Bachorz dr hab. M. Ratajczak	15	45
6-8.XI	Finanse	dr R. Ratajczak dr W. Bachorz dr hab. M. Ratajczak	15	60
13-15.XI	Marketing	prof. dr hab. H. Mruk dr B. Sojkin mgr W. Ciechomski mgr I. Rutkowski	15	75
20-22.XI	Marketing	prof. dr hab. H. Mruk dr B. Sojkin mgr W. Ciechomski mgr I. Rutkowski	15	90
27-29.XI	Planowanie strategiczne	prof. dr hab. W. Otta dr M. Gorynia dr Z. Krajewski	15	105
4-6.XII	Planowanie strategiczne	prof. dr hab. W. Otta dr M. Gorynia dr Z. Krajewski	15	120
11-13.XII	Negocjacje		15	135
13.XII	Zakończenie			

Zajęcia w dniach: Piątek 16.00 – 20.00  
Sobota 9.00 – 15.00  
Niedziela 9.00 – 14.00

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

Institution: POZNAŃ SBI

Quarter: I

Contact Person Regarding this Report Z. KRAJEWSKI / W. LAUH

Project Component OHIO STATE UNIVERSITY

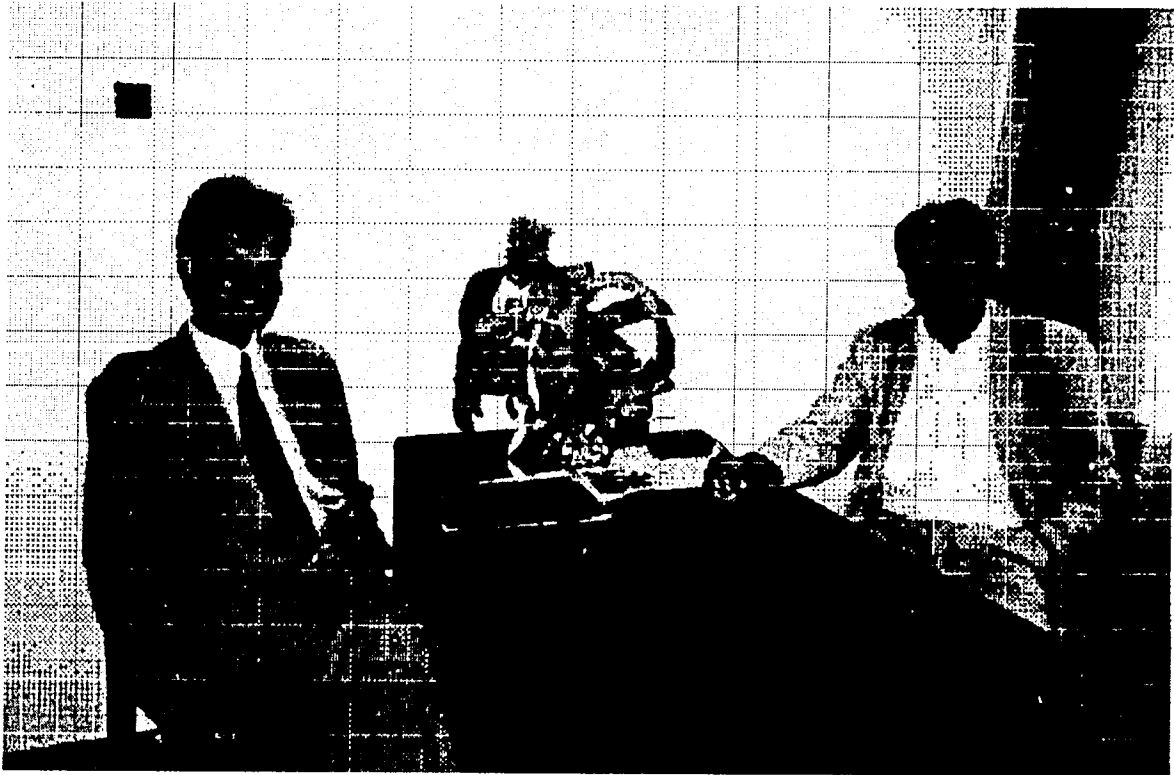
TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
Project Sustainability (Training Faculty/Trainers)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Students (Traditional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Government Officials	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Business Community/ Business Managers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Journalists - Media	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	250 ✓	<input type="text"/>	<input type="text"/>	POZNAŃ
Other Groups/Individuals	528	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	POZNAŃ
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

**COMMENTS:**

140

Rzeszow

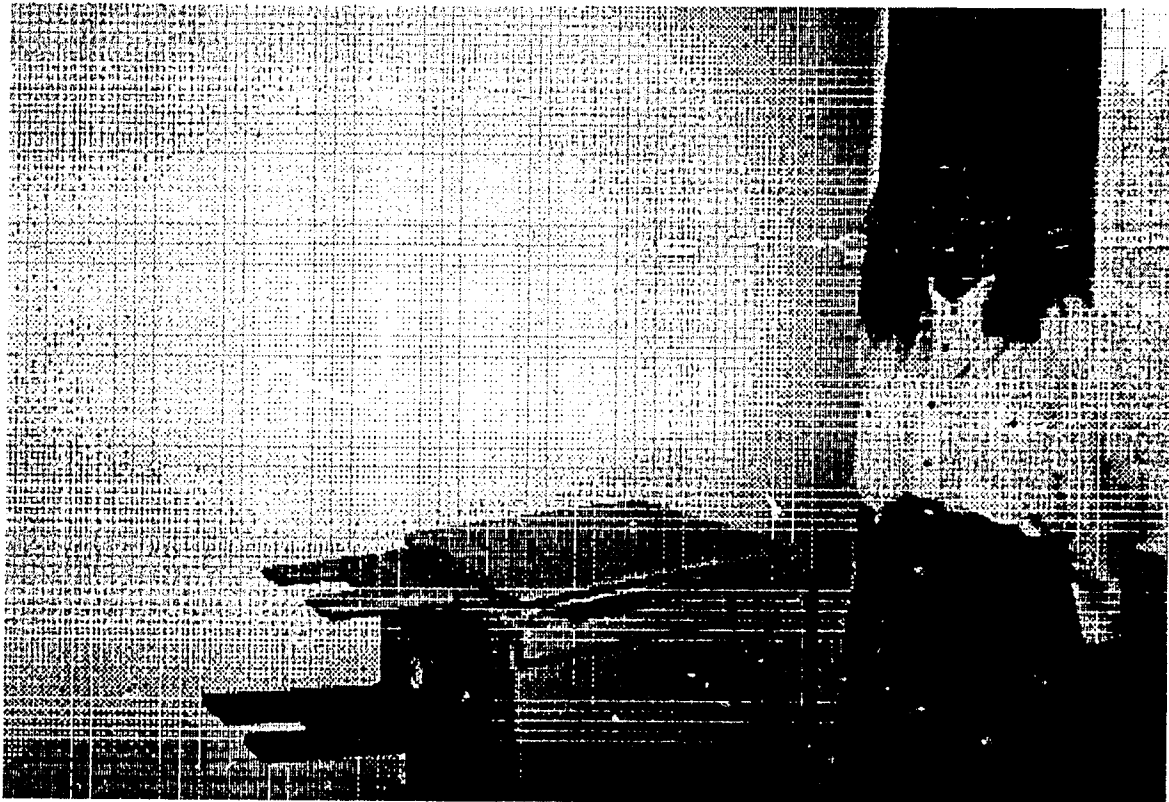


Kaszuba and Goral show their new office





Adam in the new meeting room



Assistant Malgorzata shows equipment provided by the project



FUNDACJA GOSPODARCZA

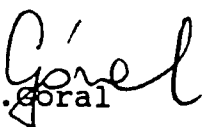
NSZZ "SOLIDARNOSC"

GDANSK

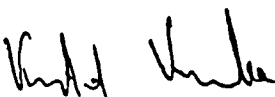
M. BALKOWSKA

Activity undertaken by coordinators of "Small Business" in Rzeszow  
September 1 - 30, 1992

1. Managing of Small Business Institute activity.
2. Meeting with teachers hired by Institute.
3. Preparing promotional campaign of new training courses in Rzeszow, Sanok, Przemysl.
4. Meeting with academic authorities of Rzeszow's universities - UMCS branch in Rzeszow and Rzeszow's Politechnic.
5. Meeting with the President of US-Poland Chamber of Commerce - Zbigniew Skiba from Chicago and entrepreneurs, members of Association of Entrepreneurs SBI Century Club.
6. Preparing teaching materials on management and export-import for workshops in November.

  
A. Goral

K. Kaszuba





POLSKO-AMERYKANSKI INSTYTUT  
PRZEDSIĘBIORCZOŚCI  
POLISH-AMERICAN  
SMALL BUSINESS INSTITUTE

35-030 Rzeszów, ul. Zygmuntowska 2a, tel. (0 17) 394-17  
PKO BP/I ODDZ. w Rzeszowie, konto III 00000 00000 0000  
fax: (0 17) 353-71

---

KURS DLA PRZEDSIĘBIORCÓW  
2 PAZDZIERNIK - 19 GRUDZIEŃ

PROGRAM

- |                            |                    |                         |
|----------------------------|--------------------|-------------------------|
| 1. PRZEDSIĘBIORCZOŚĆ       | ENTREPRENEURSHIP   | - 2.10 - 16.10.1992 r.  |
| 2. MARKETING               |                    | - 17.10 - 6.11.1992 r.  |
| 3. FINANSE                 |                    | - 7.11 - 27.11.1992 r.  |
| 4. ZARZĄDZANIE             | MANAGEMENT         | - 28.11 - 5.12.1992 r.  |
| 5. PLANOWANIE STRATEGICZNE | STRATEGIC PLANNING | - 12.12 - 19.12 1992 r. |

PRZEDSIĘBIORCZOŚĆ 2.10 - 16.10.1992

2.10. PIĄTEK

16.30-17.15

Przedsiębiorca i rynek - K.Kaszuba

17.30-19.00

Podstawy prawne działalności gospodarczej -  
spółki osobowe - A.Maciąg

3.10. SOBOTA

9.00-10.30

Podstawy prawne działalności gospodarczej -  
spółki kapitałowe - A.Maciąg

10.45-12.15

Biznes plan - U.Koziol *New*

9.10. PIĄTEK

16.30-18.00

Biznes plan - U.Koziol

18.15-19.45

Postępowanie układowe i upadłościowe -  
...1...1.1

10.10. SOBOTA

9.00-10.30

Zobowiązania - wybrane zagadnienia - A.Maciąg

10.45-12.15

Obowiązki pracodawcy

12.20-13.15

Charakterystyka przedsiębiorcy - M.Kurek -  
B.Paciura

16.10. PIĄTEK

16.30-19.45

Zasady postępowania w sprawach podatkowych -  
W.Kusnierz *New*

17.10. SOBOTA

9.00-10.30

Ustawa o kontroli skarbowej - W.Kusnierz

10.45-12.15

Zastosowanie komputerów w firmie - B.Ludwiczak

12.30-14.00

Prawo pracy-wybrane zagadnienia -  
A.Kisielewicz *New*

MARKETING 23.10 - 7.11.1992

23.10. CZWARTEK

16.30-18.00

18.15-19.45

Sposoby analizy rynku - H.Olejarz

Segmentacja i zachowania nabywców - H.Olejarz

24.10. SOBOTA

9.00-10.30

10.45-12.15

Analiza konkurencji - H.Olejarz

Badania marketingowe - H.Olejarz

6.11. PIATEK

16.30-18.00

18.15-19.45

Strategia produktu i dystrybucji - H.Olejarz

Reklama - U.Koziolek *new*

7.11. SOBOTA

9.00-10.30

10.45-11.30

11.45-14.00

Publicity i sprzedaz osobista - U.Koziolek

Ceny w marketingu - U.Koziolek

Gra marketingowa - K.Kaszuba - U.Kozioł -

B.Paciura *new*

FINANSE 13.11. - 28.11.1992

- 13.11. PIATEK  
16.30-19.45 Dokumentacja ksiiegowa i uproszczona ewidencja ksiiegowa - A.Szydelko
- 14.11. SOBOTA  
9.00-11.30 Pelne ksiegi handlowe - A.Szydelko  
11.45-13.15 Finansowa analiza wskaźnikowa - J.Kitowski
- 20.11. PIATEK  
16.30-19.45 Zarządzanie przepływem gotówki - Z.Kaszuba
- 21.11. SOBOTA  
9.00-10.30 Zarządzanie przepływem gotówki - Z.Kaszuba  
10.45-14.00 Źródła finansowania - B.Ludwiczak
- 27.11. PIATEK  
16.30-18.00 Papiery wartościowe - K.Kaszuba  
18.15-19.45 Funkcjonowanie giełdy papierów wartościowych (Warszawa, Nowy Jork) i towarowej (Chicago) - K.Kaszuba
- 28.11. SOBOTA  
9.00-12.15 Systemy i strategie podatkowe - A.Szydelko

## ZARZADZANIE 4.12 - 11.12.1992

### 4.12. PIATEK

16.30-18.00            Praktyczne aspekty zarządzania - R.Lepki  
18.15-19.45            Cele i ich wyznaczanie - M.Kurek - B.Paciura

### 5.12. SOBOTA

9.00-10.30            Organizacja i struktura - M.Kurek  
10.45-12.15            Informacja i komunikacja - M.Kurek - B.Paciura

### 11.12. PIATEK

16.30-18.00            Ludzie w zarządzaniu - R.Lepki  
18.15-19.45            Negocjacje - R.Lepki

12.12. SOBOTA

9.00-10.30 Zalety i wady planowania strategicznego -  
J.Kitowski

10.45-12.15 Proces budowy planu strategicznego w firmie -  
J.Kitowski

18.12. PIATEK

16.30-18.00 Okreslenie strategii firmy i misji celu -  
J.Kitowski

18.15-19.45 Cele firmy - J.Kitowski

19.12. SOBOTA

9.00-12.00 Prezentacja planow strategicznych wlasnej  
firmy

13.00- Zakonczenie kursu

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

Institution: SMALL BUSINESS INSTITUTE - RZESZOW

Quarter: JUL, AUG, SEP

Contact Person Regarding this Report: KRZYSZTOF KASUBA  
ADAM GOSAL

Project Component: ENTERPRISE INSTITUTES IN RZESZOW

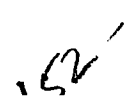
TOTAL PROJECTED STUDENT CONTACT HOURS THIS QUARTER:

STUDENT CONTACT HOURS	MANAGEMENT EDUCATION	ECONOMICS EDUCATION	CONSULTATION	OTHER	EDUCATION VIA MEDIA SOURCES	LOCATION
	Actual	Actual	Actual	Actual	Actual	
✓ Project Sustainability (Training Faculty/Trainers)	<input type="text" value="200"/>	<input type="text"/>	<input type="text" value="40"/>	<input type="text"/>	<input type="text"/>	<u>RZESZOW</u>
- Students (Traditional)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
✓ Government Officials	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
✓ Business Community/ Business Managers	<input type="text" value="600"/>	<input type="text"/>	<input type="text" value="40"/>	<input type="text"/>	<input type="text"/>	<u>RZESZOW</u>
✓ Journalists - Media	<input type="text"/>	<input type="text"/>	<input type="text" value="20"/>	<input type="text"/>	<input type="text"/>	<u>RZESZOW</u>
✓ Other Groups/Individuals (BUSINESS MANAGERS)	<input type="text" value="200"/>	<input type="text"/>	<input type="text" value="30"/>	<input type="text"/>	<input type="text"/>	<u>SANOK</u>
Other Groups/Individuals (UNEMPLOYED)	<input type="text" value="500"/>	<input type="text"/>	<input type="text" value="40"/>	<input type="text"/>	<input type="text"/>	<u>RZESZOW</u>
Other Groups/Individuals	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

COMMENTS:



PROGRAMME OF STAY OF CATHERINE ASHMORE  
IN RZESZÓW 1992, JULY 8TH.

- 10<sup>00</sup> - 12<sup>00</sup> - Meeting with coordinators
- 12<sup>00</sup> - 13<sup>00</sup> - Meeting with Director of the Management School  
prof. T. Pomianek
- 13<sup>00</sup> - 16<sup>00</sup> - Dinner (Ha Long Restaurant)
- 16<sup>00</sup> - 17<sup>00</sup> - Meeting with the participants of the course  
in WSK
- 17<sup>00</sup> - 19<sup>30</sup> - Free time
- 20<sup>00</sup> - 22<sup>00</sup> - Grand Opening of the SBI Century Club
- 

### **Why did GERBER choose ALIMA?**

with John Lower - a Financial Director of International Department of GERBER company, its representative working in Rzeszów firm ALIMA.

- Why did GERBER decided to establish joint venture with ALIMA in Poland?

- As a matter of fact, we started our preparations two years ago. We established a group of specialists that a major purpose was to find and evaluate companies manufacturing the same kind of products as ours. I was in charge of organizing and managing this group. ALIMA got the highest grades. ALIMA was considered as our partner in terms of manufacturing baby food. Products of the both companies are not competitive but supplementary. ALIMA offers a broad range of baby food products. What made us make such a decision was the quality of its production as well as the quality of its components used in the process like vegetables and fruit being grown in Poland.

- What is GERBER'S position in the U.S.A. market?

- 70% of baby food products is delivered by GERBER. But it should be added that we reached it through 60 year experience of developing marketing strategies. GERBER has spent a lot of money on conducting marketing researches and promotional activities. We have a research team of 400 specialists. Our aim is to sell products and services of the best quality. We also pay a lot of our attention to the conditions of our shops selling our products. They must meet our requirements especially sterile cleanness.

- How much does GERBER intend to invest in the Polish venture?

- During the nearest 2-3 years we are investing about \$ 14 millions. In this year we are to spend \$ 6 millions to buy new machines and some computers. Some of them have been installed in ALIMA. There is a great need to develop some marketing strategies and researches. We need clients who will buy our products and also we need to learn about their needs, expectations. Of course, we are aware that our undertaking is measured not by the amount of stockholders' shares but by the provided number of investments. This is well understood by the President of Rzeszów. We believe that our business will give a good opportunity for Polish farmers to get more profits from our venture. There is a huge demand for our products in France, Greece, Israel, Italy, Hungary. But we are planning to sell our products to Ukraine because it is a future market for our products. It will develop the economy of Rzeszów and its region. ALIMA's products may compete with others on all of the world markets. Any judgments about uncertain future for ALIMA are unjustified. It is true that our priority is the highest quality of products but ALIMA meets our requirements.

- You have worked in ALIMA for several months, what you like best what you would change?

- I have found a lot of positive factors here, the most important are: the quality of production, good education among employees as well as good level of technology. Negative ones are such as: poor communication and information system but it is related to the lack of means of communications. When you are trying to solve any problem in Polish reality suddenly a lot of obstacles appear - doors and walls. In the U.S.A each employee has an easy access to sources, he may discuss any problem with his manager. Formalism kills employees' creativity. It happens not only in Poland. The best example is Japan where students wearing traditional uniforms remember a lot of details. In the U.S.A. students are taught how to study. The result is that Japan became a very rich country but more creative ideas were born in the U.S.A.

- What are your plans in terms of cooperation with ALIMA?

- A lot of work needs to be done. We have already trained several Polish employees in the U.S.A. I'm sure that they will use their experiences gained in my country to improve their work in ALIMA. I admire their flexibility. They accept all the changes we are trying to implement and do their best to adjust themselves to new situations. We are working on new organizational structure of the business which will guarantee its better efficiency. We also need to run some trainings in terms of using computers in manufacturing. It should be underlined that ALIMA's employees are also shareholders of the firm. That is why it is for their good to learn as much as they can. The most important topics which need to be developed are: finance and marketing. We are also changing an accountancy system. Our partners have to understand that the major power of any success exists in a working team. Building working teams has become the first key of our business activities aim in ALIMA.

- Why do you want to keep your own name-GERBER for products being manufactured and exported by ALIMA?

- As I have already mentioned we reached our position on the international markets through many years of working in that field so it will be the less expensive way to sell such products through our channels of distribution. We are even not changing the package of products exported to the Central and the Western Europe. I think that Polish farmers do not care if their apples processed into baby-fruit products will be sold by ALIMA or GERBER. Increasing our sales we will create a new opportunity for Jarosław manufacture to increase their production of bottles. Such a situation will create new job positions and many advantages.

- Have you read a story how GERBER selected ALIMA described in Polish press?

- Yes, indeed. Business people in Poland as well as in the U.S.A. are looking at foreign companies trying to reach new target market in the same way. In the U.S.A. market there is a great amount of German and Japanese companies. They developed a very strong market competition. Americans do not manufacture everything of the best quality. Thousands of Americans are involved in the process of manufacturing Japanese cars in the U.S.A. Such a situation usually causes sensations. But if any company happens to reach a new target market it will give a great opportunity for economic development of the region. I am convinced that GERBER in cooperation with ALIMA will prove it very quickly.

- Thank you very much for our meeting wishing you to reach your goals in the Polish market





we would like to make another appointment with you to discuss your real achievements in our region. When do you think it will happen?

- I assume next year?

It is the first interview of a new series that a key aim is to prove that Poles have started to understand the reality of market economy. We, coordinators of Small Business Institute in Rzeszów feel to be responsible for developing education in terms of market economy in our region. We think that such an atmosphere around a joint-venture ALIMA -GERBER proves that there are a lot of people who simply do not understand the basic rules of doing business. In the world of business the strongest companies determine rules in the market economy. They manage their own business using only one tool - an economic calculation. We need such strong partners. Our problem is not a lack of money. We really need to learn about market economy, to start thinking in positive and creative way. We are sure that the joint-venture GERBER ALIMA will become the best undertaking in our region.

155

PONIEDZIAŁEK

**DZIŚ W NUMERZE:** Dni — godziny, centymetry — mile  Interes centrali, interes prowincji  Porażające indywidualium  Ostatni apel  Rodzina w stadium organizacyjnym

GAZETA CODZIENNA

# NOWINY



Rozmowa z JANEM LOWEREM

— dyrektorem finansowym

Wydziału Międzynarodowego firmy Gerber,

przedstawicielem Gerbera

w zakładach Alima w Rzeszowie

**D** — Dlaczego Gerber wybrał Alimę jako partnera do joint venture w Polsce?

— Do utworzenia joint venture przygotowaliśmy się od dwóch lat. Stworzona została grupa analityków, której zadaniem była ocena firm produkujących towary podobne do naszych. Tak się złożyło, że mnie powierzono organizację i kierownictwo tej grupy. Alima uzyskała najwyższą ocenę. Na

szym zdaniem była najlepszą firmą w Polsce w branży produktów spożywczych dla dzieci. Kierowaliśmy się faktem, że wybory Alimy i Gerbera nie są konkurencyjne, a po prostu się uzupełniają. Dają szerszą ofertę produktów dla dzieci. Istotnym elementem tej wysokiej oceny była jakość produkcji, a także jakość warzyw i owoców uprawianych przez farmerów rzeszowskich, powiadająca wymaganom Gerbera.



— Jaka jest pozycja Gerbera na na rynku amerykańskim?

— Udział Gerbera wynosi około 70 proc. Nie stało się to oczywiście z dnia na dzień. Złożyło się na to 60 lat ciężkiej pracy. Zdobycie marki na rynku wymaga wielu lat pracy, doświadczeń i odpowiednich strategii marketingowych. Bardzo duże pieniądze Gerber przeznacza na badania, marketing i reklamę. W zespole badawczym pracuje 400 naukowców.

Najważniejsza dla firmy sprawa to jakość produktu i usług. Na nasz sukces złożyła się m.in. aktywna polityka w zakresie utrzymania prawie sterylnej czystości w naszych sklepach. Tym wszystkim właśnie, 60 latami, które złożyły się na naszą pozycję na rynku zamierzamy się dzielić z rzeszowską Alimą.

— A ile konkretnie firma Gerber ma zamiar zainwestować w rzeszowską firmę?



JAN LOWER — dyrektor finansowy i administracyjny Wydziału Międzynarodowego firmy Gerber, od lutego 1992 przedstawiciel Gerbera w Alimie Rzeszów.

dukty Alimy z Francji. Spodziewamy się z Grecji, Izraela, Włoch, Węgier, Czecho-Słowacji. Nie ulega wątpliwości, iż w przyszłości zainteresujemy się Ukrainą. Jest to wielka szansa dla rzeszowskiego regionu. Produkty Alimy mogą być konkurencyjne na światowych rynkach. Będziemy bardzo zajęci przez najbliższe lata. Wszelkie obawy co do przyszłości firmy są nieuzasadnione. Oczywiście wymagamy dobrej jakości produktu, ale jakość to podstawa sukcesu w każdej dziedzinie.

— Przebywa Pan w Polsce już kilka miesięcy, co się Panu w Alimie podoba, a chciałby Pan zmienić?

— Pozytywne to jakość produkcji, ogólne wykształcenie pracowników i dobra technologia. Mankamenty to przede wszystkim sfera komunikacji i informacji. Dotyczy to nie tylko technicznych środków łączności, ale kontaktów międzyludzkich. W Polsce jest za dużo drzwi, ścian i gabinetów. W USA nie ma problemu by podyskutować z szefem. Mogę siedzieć i jeść posiłek czy też z kimś rozmawiać i nie ma problemu by pracownik nie mógł podejść i zapytać. Formalizm zabija kreatywność pracowników. Dotyczy to nie tylko Polski. Dobrym przykładem jest Japonia. Studenci w tradycyjnych uniformach, pamiętają wiele faktów. W USA nauczyciele uczą, jak się uczyć. W rezultacie Japonia jest bogatym krajem. Ale z USA pochodzi większość nowych pomysłów w technice, organizacji produkcji.

— Jakie są zatem najbliższe zamierzenia Gerbera w Alimie?

— Czeka nas wiele pracy. Kilka osób pojechało do USA na przeszkolenie. Mam nadzieję, że będą mogli wykorzystać najlepsze pomysły, idee i zostawić je tutaj, w Rzeszowie. Wielkim plusem Alimy jest, że ludzie akceptują zmiany i szybko się przystosowują. Przyjęliśmy nowych pracowników do działu sprzedaży i finansów. Budujemy strukturę organizacyjną która ma zapewnić maksymalną produktywność. Część pracowników musi być przeszkolona na komputerach. Będziemy wprowadzać zmiany w technice biznesu. Nie należy zapominać, że pracownicy są udziałowcami firmy. W ich interesie jest uczyć się tych nowych technik. Podstawowa sprawa to marketing i finanse. Musimy szybko dostosować rachunkowość do wymagań gospodarki rynkowej. W USA dawno zrozumieliśmy, że siła tkwi w zespołach. To właśnie, czyli budowa zespołu jest naszym celem, numerem jeden w Alimie.

— Dlaczego przy eksporcie wyrobów Alimy zamierzacie używać nazwy Gerber?

— Jak już podkreśliłem na naszą pozycję na rynku pracowaliśmy 60 lat. Wejście z naszą nazwą na rynek przy wykorzystaniu naszych kanałów dystrybucji będzie tanie i szybkie. Nie planujemy zmian opakowania przy eksporcie do Europy Środkowej i Wschodniej. Do Francji czy innych krajów Europy Zachodniej wyroby Alimy będziemy eksportować jako produkt Gerbera. Znacznie prościej i łatwiej znaleźć na rynku miejsce dla produktu Gerbera. Pieniądże jednak i tak zostaną w Polsce. Dla rzeszowskiego farmera nie ma znaczenia czy jabłka przetworzone na Bobo-frut zostaną sprzedane jako produkt Alimy czy Gerbera. Większa sprzedaż to także szansa dla producenta buteleczek z Jarosławia. Mogą zwiększyć produkcję zatrudnienie, więcej płacić.

— Czy zna Pan publikacje w polskiej prasie o kulisach przyjęcia Alimy przez firmę Gerber?

— Ludzie w Polsce czy USA tak samo patrzą na wejście obcych firm na rynek. W USA działa wiele firm niemieckich czy japońskich. Amerykańskie firmy nie produkują wszystkiego najlepiej. Tysiące Amerykanów wytwarzają japońskie samochody w USA. Tego typu sytuacje zawsze wywołują dyskusję. Ale wejście obcych firm, to w większości przypadków szansa na reaktywowanie gospodarcze miasta czy regionu. Jestem przekonany, że wraz z polskimi przyjaciółmi z Alimy dam szybko dowody takiej roli firmy Gerber w regionie rzeszowskim.

— Dziękując za rozmowę i życząc by te zamierzenia stały się rzeczywistością już dzisiaj umawiamy się Panem na kolejną rozmowę, by o tych konkretnych dowodach podyskutować. Jak Pan sądzi, kiedy?

— Może za rok?

magistra biznesu Pracował w banku komercyjnym. Do Gerbera trafił poprzez swoją żonę, która szkolila pracowników Gerbera Pracę w Gerberze rozpoczął w 1984 r., w dziale rachunkowości. Po 4 latach zaangażowano mu pracę w dziale międzynarodowym firmy. Specjalizuje się w zarządzaniu finansami. Jako przedstawiciel Gerbera pracował w Kostaryce Meksyku, Wenezueli, Porto Rico, Hongkongu, Tajwanie, Korei, Singapurze i Francji. W rzeszowskiej firmie Alima spędzi prawdopodobnie 2 lata.

— W najbliższych 2-3 latach ok. 14 mln. dolarów. W bieżącym roku na nowe maszyny, komputery przeznaczaliśmy 6 mln dolarów. Pierwsze urządzenia są już instalowane w Alimie. Oprócz tego duże środki przeznaczymy na szkolenia, marketing. Rynek wymaga marketingu, reklamy. Musimy badać gusty konsumentów. Musimy inwestować w eksport. Nikt nie przyjdzie sam do Rzeszowa kupić produkt. Musimy go o tym poinformować. To wymaga aktywnej polityki promocyjnej. Mając świadomość niedoskonałości polskiego marketingu właśnie tej dziedzinie poświęcamy najwięcej uwagi. Dobrze jest pamiętać, że wartość firmy związana jest nie z wartością udziałów, ale wartością inwestycji. Niektórzy to rozumieją, np. Pan wojewoda rzeszowski. Chcemy zwiększać wartość firmy. Alima dla udziałowców, a także dla rzeszowskich farmerów. Wzrost firmy, to wzrost skupu, a to oznacza zwiększone dochody dla farmerów. Już dziś mamy zamówienia na pro-

szych struktur organizacyjnych i systemów komunikacyjnych nie wymusza jakichkolwiek zmian. Ma nadzieję, że szkolenia przeprowadzone w USA sprawią, że polscy pracownicy joint venture, sami przeniosą na nasz grunt to, co jest możliwe do przeniesienia.

Powyższym wywiadem chcieliśmy zapoczątkować ciąg publikacji, które dadzą dowody, że Polacy zaczynają rzeczywiście rozumieć, czym jest gospodarka rynkowa. Jako twórcy Instytutu Małej Przedsiębiorczości w Rzeszowie czujemy się odpowiedzialni za edukację ekonomiczną. Wydawało nam się, że atmosfera wokół joint venture Alima — Gerber stworzona jest przez osoby, które nie rozumieją podstawowych zasad biznesu. W świecie tego biznesu jest ustalony pewien porządek. Warunki dyktowane są przez mocnych, a ci kierują się jedynie rachunkiem ekonomicznym. My potrzebujemy tych mocnych. Naszym problemem nie jest jedynie brak pieniędzy. O wiele większym problemem jest ciągła nieznanomość podstawowych zasad biznesu, brak pozytywnego twórczego myślenia, nieumiejętność planowania strategicznego i niedoskonałości naszego marketingu. Stąd, dyskutując na temat ceny Alimy zaznajmiamy pamiętań choćby o tym, że Gerber oddał jej swoją sieć marketingową, na którą pracował 80 lat. Z pełnym przekonaniem dzisiaj twierdzimy, że joint venture Alima — Gerber będzie jednym z większych osiągnięć gospodarczych naszego regionu w najbliższym czasie.

ADAM GÓRAL  
KRZYSZTOF KASZUBA

### FIRMA GERBER — wynik finansowy

Za okres 6 miesięcy na koniec 30 września 1991 (w tys. dolarów)

	1991	1990	proc. zmiana
Sprzedaż netto i pozostałe przychody	596,944	589,486	1,3
Dochód przed opodatkowaniem	107,450	100,073	7,4
Rezerwa na pokrycie podatku dochodowego	39,232	37,091	3,1
Dochód netto	69,218	62,987	9,9
Dochód netto w dolarach na jedną akcję	1,85	1,67	10,8
Przeciętna liczba wyemitowanych akcji (w tys. sztuk)	37,416	37,742	

### FIRMA GERBER — Bilans

30 listopada	1991	1990
<b>Aktywa</b>		
Gotówka i lokaty krótkoterminowe	131,371	128,124
Należności na rachunkach	118,117	112,353
Zapasy	212,563	182,780
Razem aktywa bieżące	462,051	423,257
Pozostałe aktywa	204,182	176,424
Majątek trwały netto	204,762	197,359
Razem	870,995	797,040
<b>Pasywa</b>		
Zobowiązania bieżące	222,516	167,818
Zadłużenie długoterminowe	126,345	165,946
Inne zobowiązania	84,145	80,362
Kapitał akcyjny	437,989	382,914
Razem	870,995	797,040

### OMÓWIENIE WYNIKÓW FINANSOWYCH FIRMY GERBER

Wynik finansowy (rachunek wyników) i bilans to dwa podstawowe dokumenty przedstawione w postaci raportu akcjonariuszom. Jest to wymóg dotyczący wszystkich korporacji publicznych, tzn. takich, których papiery wartościowe są przedmiotem obrotu na giełdzie papierów wartościowych lub na rynku pozagiełdowym. Ponieważ Gerber jest korporacją publiczną, której akcje notowane są na NYSE - Nowojorskiej Giełdzie Papierów Wartościowych, jej akcjonariusze muszą otrzymywać sprawozdania finansowe co kwartał.

Rachunek wyników pokazuje, poprzez podzielenie dochodu netto przez liczbę wyemitowanych akcji jaki jest dochód na 1 akcję. Na dzień 30 listopada ub. r. dochód ten wyniósł 1 dolara i 85 centów.

Bilans przedstawia sytuację finansową firmy na koniec określonego okresu.

Lokaty krótkoterminowe to głównie łatwe zbywalne papiery wartościowe. Majątek trwały netto to różnica pomiędzy sumą wszystkich trwałych (długoterminowych) aktywów firmy, ujętych według wartości początkowej minus ich umorzenie. Kapitał akcyjny to nic innego jak pieniądze, które firma winna jest właścicielom (akcjonariuszom). Obejmuje on na ogół akcje uprzywilejowane i zwykłe, liczone według wartości nominalnej. Ponadto kapitał wpłacony ponad wartość nominalną akcji zwykłych a także dochód zatrzymany, czyli zysk nie podzielony. Zysk ten firma przeznaczona na sfinansowanie jej aktywów.

Dane z dwóch różnych okresów umożliwiają dokonanie porównań z np. rokiem poprzednim. W przypadku firmy Gerber jej aktywa w okresie roku wzrosły o 73 miliony dolarów. W największym stopniu złożył się na to wzrost pozostałych aktywów, (głównie odroczone płatności, wpłaty na emerytury i środki na ubezpieczenia) oraz wzrost zapasów o 30 milionów dolarów. Jak wynika z powyższych danych, roczna sprzedaż firmy Gerber wynosi ponad miliard dolarów. Dla porównania sprzedaż największej korporacji świata General Motors wynosi około 125 miliardów dolarów rocznie, a firmy zajmującej pięćsetną pozycję na liście 500 największych korporacji świata magazynu Fortune, około 2,5 miliarda dolarów. Wartość sprzedaży lidera Warszawskiej Giełdy Papierów Wartościowych, firmy Exbud wyniósł w roku ubiegłym około 150 milionów dolarów.

Cena 1 akcji firmy Gerber na NYSE, w listopadzie ubiegłego roku, kształtowała się na poziomie około 66 dolarów.

KRZYSZTOF KASZUBA

## **QUESTIONNAIRE - ENTREPRENEURSHIP**

### **1. What did you like most at the seminar?**

- law issues in terms of running business (2)
- teaching method
- introduction to entrepreneurship and information about different types of companies (2)
- the instructor's way of delivering information
- the part focus on entrepreneurship and market, law issues and introduction to business
- everything but specially the opportunity to discuss with the instructor
- very useful information in terms of civil and commercial law

### **2. What did you like least?**

- using computers in small business
- frequent changes of instructors
- provided information were too academic; lack of real life examples; lack of information about international trade regulations

### **3. Did the seminar meet your expectations?**

- Yes, it did (8)
- almost in 75%

### **4. What kind of additional assistance do you need in terms of provided topics?**

- more information on specific topics in terms of law issues (2) and also more professional materials about different types of companies (4)
- more information about business law in terms of running business (2)
- more materials in terms of writing a business plan (2)
- When I start running my on business I will have a lot of questions to a lawyer

### **5. Would you recommend the workshops to other small business owners?**

- Yes, I would (6)
- The seminar is very helpful but I don't think it is indispensable
- I will share with other owners information on law issues
- It is very helpful specially for "beginners"

### **6. What are your suggestions as to improving the program of the seminar?**

- My suggestion is to do more individual work in terms of writing business plan under the guidance of the instructor (2)
- we need more "real life" examples
- to prepare more professional materials



**7. What is your opinion about the workshops?**

- good
- we need more time to spend on reading
- positive (3)
- very useful
- excellent I listened to the lectures with bated breath
- good (2)

**8. How do you evaluate the workshops?**

- excellent (3) .....
- good (6) .....
- poor .....

**9. Other opinions:**

- the scope of such a seminar was so wide that it should last longer
- we need much more information about using computers (2)
- I am interested in getting more knowledge in terms of business
- more information about up to date tendency related to using computers in small business
- more exercises

## **QUESTIONNAIRE - MARKETING**

### **1. What did you like most at the seminar"**

- natural way of teaching (2)
- real life examples
- individual topics supplemented with videos were good choice (2)
- teaching method - inventiveness in running classes
- Ms Ula and her examples in terms of economic analysis of some existing businesses based on their business plans (2)
- the role of advertisement
- Ms Ula and her openness and kindness

### **2. What did you like least?**

- mistakes in spelling of English words
- some topics were presented summarily (I guess it was necessary) what unable us to make some notes
- lack of materials related to topics; lack of exercises focus on writing business plans - but it is necessary
- lack of marketing strategies based on real industry

### **3. Did the seminar meet your expectations?**

- Yes, it did (7)
- It was my first "meeting" with marketing issues (2)
- to some extent yes because we need more information about marketing issues in terms of small businesses as well

### **4. What kind of additional assistance do you need in terms of provided topics?**

- more information about manufacturing strategies
- no idea
- I got what I needed (20)
- This *INSTITUTE* needs to establish a library and a reading room; consulting services and meetings with members of Business Club would be very helpful
- we need a module on writing a business plan
- I need an assistance in advertising my own business through mass media
- ways of running business in case of sale fluctuations

### **5. Would you recommend the seminar to other small business owners?**

- I will promote the seminar (3)
- it is useful but not indispensable
- specially the role competition analysis and advertisement
- the most important issue (in my opinion) writing business plan
- provided knowledge is very useful to run your own business

- how to write loan applications
- how to advertise your own business

**6. What are your suggestions as to improving the program of the seminar?**

- more additional materials for participants (2)
- have no idea
- well done (3)
- more individual work (2) under the guidance of the teacher, professional materials and videos
- more exercises in terms of writing a business plan and doing marketing research

**7. What is your opinion about the seminar?**

- individual topics were a good choice
- we need more time to read provided materials
- positive (2)
- good job (4)
- it helped me to understand marketing issues
- I liked them a lot
- cozy atmosphere; presentation made in clear way

**8. How do you evaluate the seminar?**

- excellent (5)
- good (5)

**9. Other opinions:**

- I suggest organizing next seminars in fall and winter
- a scope of the seminar was so wide that it should be run longer
- It was a very good idea to organize such a seminar in my firm

## **QUESTIONNAIRE - MANAGEMENT**

### **1. What did you like most at the workshop?**

- the lecture in terms of structure and organizing business (2)
- cases on real management
- "A prisoner's dilemma" - an example of group's competition - how to conduct negotiations (2)
- friendly atmosphere, the instructor with a very good professional knowledge
- introduction to small business management
- the instructor's ability to force the participants to independent thinking

### **2. What did you like least?**

- no opinion
- making presentation in a hurry
- boring lectures about organizing; lack of modern methods used in management, lack of information about the world's tendencies in management

### **3. Did the seminar meet your expectations?**

- Yes, indeed (9)

### **4. What kind of assistance do you need in terms of provided topics?**

- I don't think I will need any
- how to conduct negotiations
- more instructions in terms of using professional knowledge in practice-running small business
- more professional materials (2) and real life examples
- more lectures

### **5. Would you recommend the seminar to other small business owners?**

- I will share with them materials provided during the seminar(2)
- I will suggest participating in such kind of seminars
- it is useful but not indispensable
- about negotiations which become a very important part of business activities in market economy
- Yes, I would because it provides basic knowledge in terms of running business
- I will give them some ideas how to organize and manage a small business

### **6. What are your suggestions as to improving the program of this seminar?**

- too many classes
- more lectures - I think that the instructor might have provided more practical

- information based on his own experience
- using more audio visual methods
  - topics should be set in better order

**7. What is your opinion about the seminar?**

- positive (4)
- too many classes
- it provided very important business knowledge (indispensable)
- I need more hours of classes
- good
- o.k.

**8. How do you evaluate this seminar?**

- excellent (3) .....
- good (4) .....
- poor (2) .....

**9. Other opinions:**

- I suggest such classes should be organized in fall and winter.

**QUESTIONNAIRE - STRATEGIC PLANNING**

**1. What did you like most at the seminar?**

- statistic data which made the provided topics understandable; teaching methods
- presented business strategies and way of determining target missions (2); transparencies
- very interesting teaching method and ability to draw the participants attention
- presenting strategic planing;
- using transparencies, materials prepared by American experts; showing real life cases (2)
- goals setting and information about sales and costs
- friendly atmosphere, good contacts with students

**2. What did you like least?**

- no opinion
- lack of real life cases
- lectures should be set in better order

**3. Did the seminar meet your expectations?**

- In general, yes (6)
- It was my first seminar, in which I attended, in terms of strategic planning so that I would rather not to make any evaluation (2)
- No, it didn't; more strategies in terms of setting-up new ventures should have been delivered

**4. What kind of additional assistance do you need in terms of presented topics?**

- how to adjust provided knowledge to real situations
- more professional materials (2)
- a library, a reading room, consulting services
- in the process of preparing strategies for my own business (2)
- more real life examples

**5. Would you recommend the seminar to other small business owners?**

- Yes, I would because it is very useful (5)
- mainly planning analysis
- very interesting teaching method
- Yes, I would. I think that knowledge in terms of strategic planning helps us to avoid mistakes in running business

**6. What are your suggestions as to improving the program of the seminar?**

- no idea

- more real life examples related to manufacturing companies
- more "discussions" with participants
- well done
- we need more readings (studying materials) (2)
- The program would be more understandable if you began it with presentation of basic information about strategic planning, e.g. logistic

**7. What is your opinion about the seminar?**

- positive (2)
- good (2)
- it helped to gain a proper approach to strategic planning
- it was very interesting and useful
- I liked it

**9. Other opinions:**

- It was wonderful idea to organize it in our company
- I would suggest organizing next seminars in fall and winter
- more time to become comprehensive

## **QUESTIONNAIRE - FINANCE**

### **1. What did you like most at the seminar?**

- practical approach to specific topics
- lectures on financial sources (4) banks activities (2) getting loans;
- accounting; tax policy (4)
- clear presentation made by Ms Alfreda Szydelko; others lectures were also done very well because they related to real life examples
- putting together theory with practical experience what made provided topics understandable; friendly atmosphere,
- financial sources, cash flow, ledgers
- Ms A. Szydelko who did wonderful job trying to teach us financial issues in such a short time
- everything was excellent; lectures on cash flow management were outstanding
- provided comprehensive coverage of indispensable topics

### **2. What did you like least?**

- We need more time to spend on running ledgers (3)
- We need more information about law regulations in terms of finance
- We need more individual work under the guidance of instructors (2)
- We were told how to run profitable business through "costs manipulation" but what about legal issues in running own business?; lack of information in terms of manufacturing companies

### **3. Did the seminar meet your expectations?**

- Yes, indeed (8)
- I got more than I expected
- more information about cash flow management

### **4. What kind of additional assistance do need in terms of presented topics?**

- more information on specific topics (2)
- more details related to record keeping (2)
- more studying materials on law regulations in terms of records keeping, taxes
- In future, I would suggest meetings with representatives of Business Club; There is a great need to establish a library and a reading room in the *INSTITUTE*
- notes
- I appreciate Ms Szydelko suggestion to help us with record-keeping because I am not ready to do it myself
- I need more materials based on real life problems solving examples



**5. Would you recommend the seminar to other small business owners?**

- Yes, I will do (5)
- I will suggest using "accumulated depreciation"
- this *INSTITUTE* has very good specialists in finance who know very well their job
- specially cash management

**6. What are your suggestions as to improving the program of the seminar?**

- more additional studying materials for the participants(3)
- more real life examples (2)
- more details on specific topics
- more lectures

**7. What is your opinion about the seminar?**

- positive
- we need to spend more time on studying provided materials
- good (2); more real life exercises
- it was the most important part of the seminar
- very useful;
- excellent (2)
- more individual work than theory

**8. How do you evaluate the seminar?**

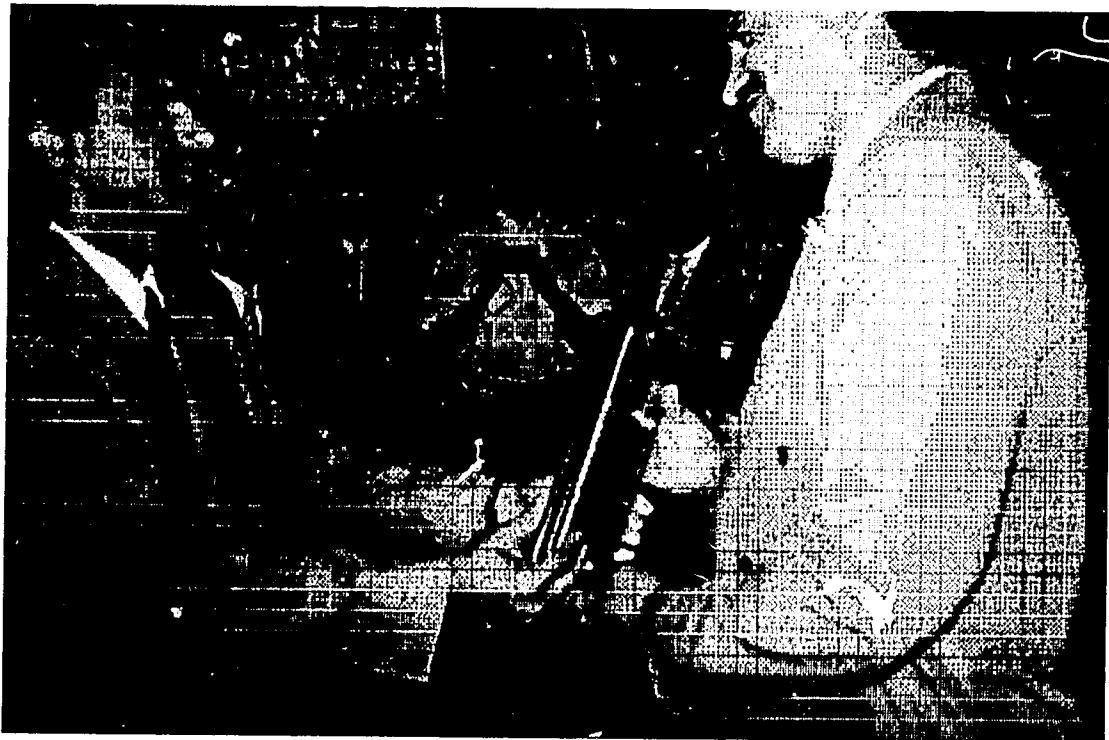
- excellent (7) .....
- good (3) .....
- poor .....

**9. Other opinions:**

- I suggest organizing next seminar in fall and winter
- such a program should be run longer (2)
- I would like to thank you for organizing such a seminar in the company . I think that only financial specialists may help us in our present situation of chaos in terms of law regulations
- more real life examples
- more individual work under the quaidance of the instructor.



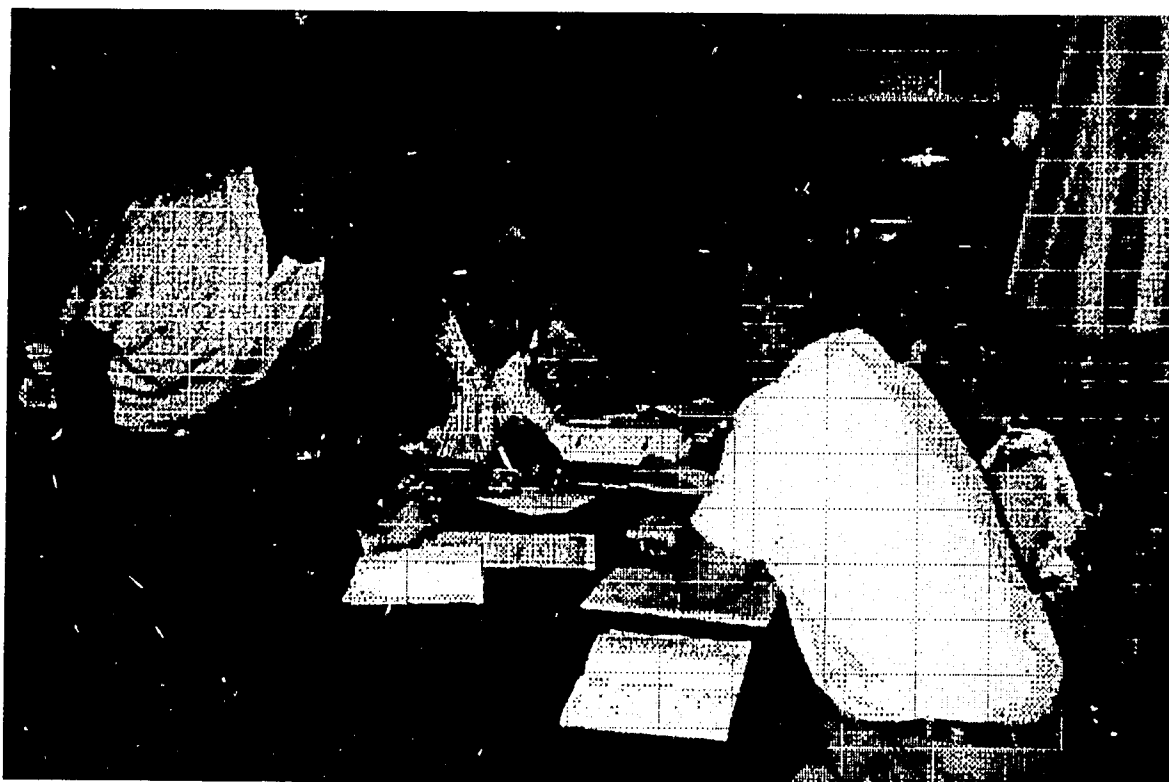
Rzeszow opens their Century Club



Award presented to outstanding entrepreneur



Small groups at work in Rzeszow training program





**APPENDIX**  
**4.0**

**TASK  
FORCE  
MEETINGS**

TASK FORCE

A list of persons for November 23 meeting whom invitations has been sent

1. Mieczysław Bak	National Chamber of Commerce
2. Krystyna Gurbiel	EC. Cooperation Fund
3. Jerzy Iwicki	Ministry of Industry and Commerce
4. Wojciech Kempisty	Bureau of Faculty Coordination
5. Marek Kozak	Bureau for Foreign Aid Cooperation /Council of Ministers
6. Patrick La Combe	U.S Embassy - Labor Attache
7. Nina Majer	U.S Agency for International Development U.S Embassy
8. Jolanta Tanaś and	
9. Andrzej Lech	Department of Entrepreneurship Promotion Ministry of Industry
10. Zofia Wyderkowska	National Education Ministry
11. Ewa Banachowicz	Doctor of Economics
12. Mirosław Mironowicz	Ministry of Ownership Change
13. Zbigniew Ejsmont	Minister of Entrepreneurship Promotion

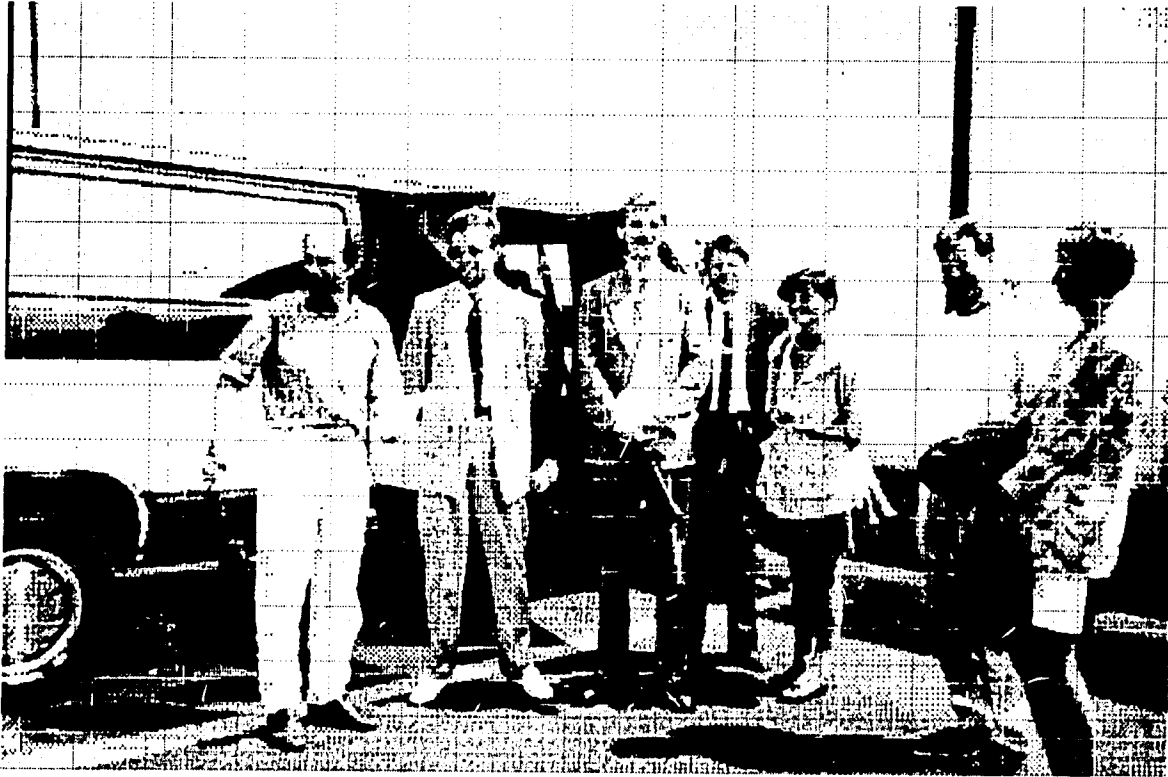
AGENDA FOR THE TASK FORCE MEETING  
ENTREPRENEURSHIP INSTITUTES IN POLAND PROJECT  
Hotel FORUM, Warsaw, 23rd November 1992

1. Welcome
  
2. Introduction - short overview of  
the Entrepreneurship Institutes in  
Poland Project - first year
  
3. Plans for the second year
  - \* Institutes' activities
  - \* Workshop in November
  - \* National Conference
  - \* Each Institute proposals concerning  
the future development of the  
Project
  
4. The role of the Advisory Committee  
during the second year of the Project  
realization
  - \* Proposals of Members of the  
Advisory Committee
  - \* Importance of networking and  
coordination of SB promotion
  
5. Presentations and suggestions of AC  
Members concerning points 3 & 4.



**APPENDIX**  
**5.0**

**VISIT  
U.S.  
SCHOOLS**



Polish visitors: Kaszuba, Plawgo, Krajewski, Jurgelewicz, Balkowka, Goral and Unterschuetz



Plawgo, Jurgelewicz, Unterschuetz, Krajewski and Unknown



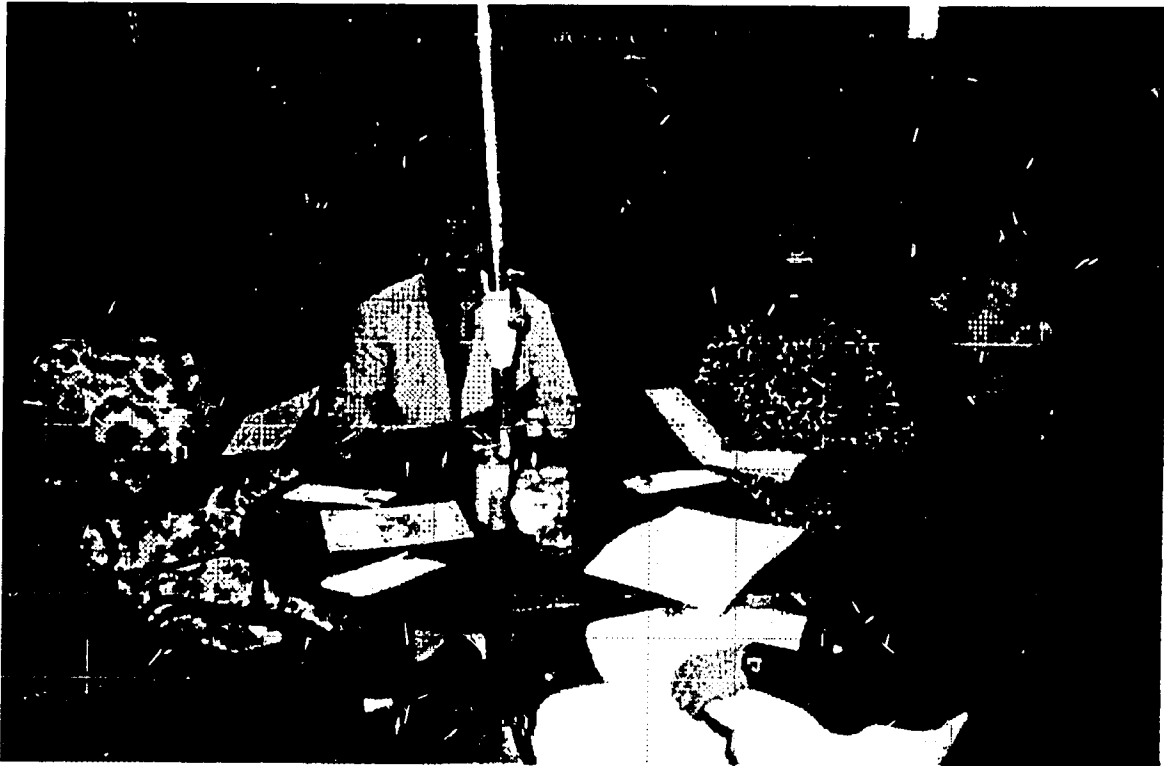


Plans were underway for Year II at OSU

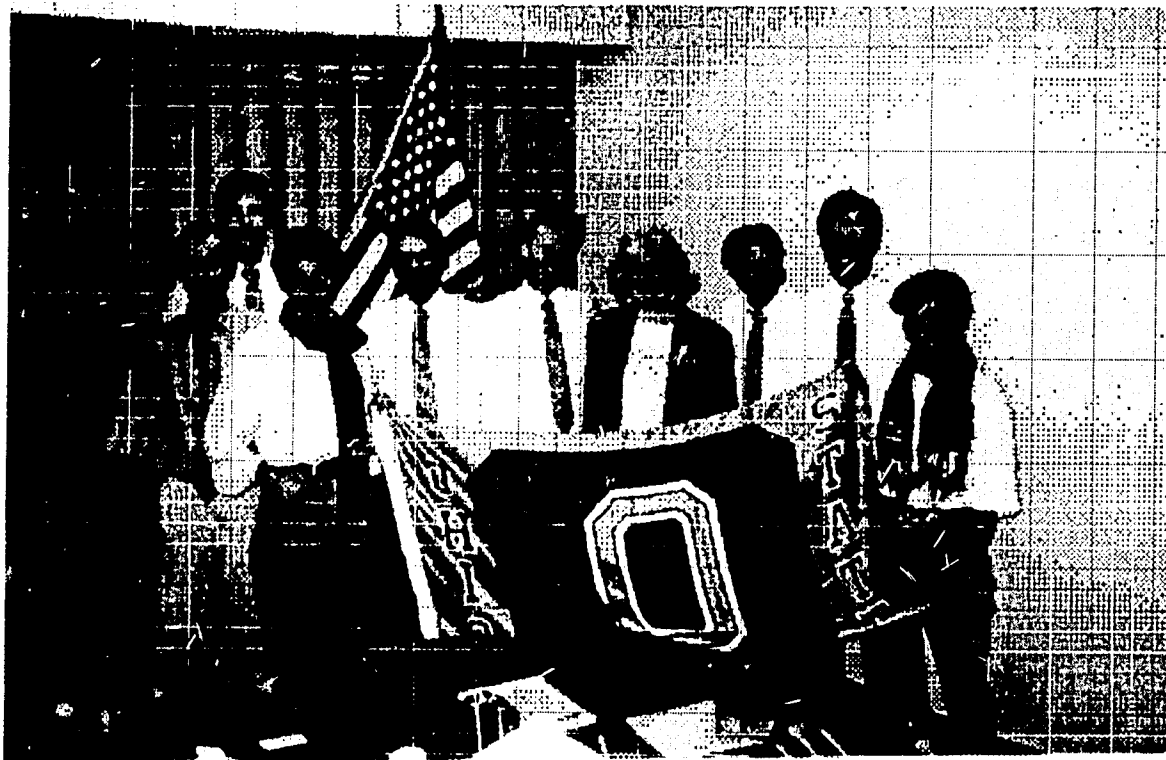


Gregorz, Gerry, Adam and Krzysztof renew friendships

176



Cooper, Bartoszewicz, Jacowicz, and Korynski enjoy a break from the work



Polish coordinators conclude visit to The Ohio State University

CATHY A-  
FYI



1900 Kenny Road  
Columbus, Ohio 43210-1090

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

July 14, 1992

Via FAX

Nina Majer  
U.S. Embassy, Warsaw  
Al, Ujazdowskie 29/31  
Poland

RE: Notice of International Travel Pursuant to AID Grant #EUR-0029-G-00-1040-00

Dear Ms. Majer:

This letter is notice of international travel that is required to be given by the above referenced AID grant. Following is a list of persons from Poland who will be visiting the United States during the month of August. While in the United States, they will visit Small Business Development Centers, attend conferences, and receive entrepreneurship training at Ohio State University. They will leave Warsaw, Poland on August 1, 1992 and arrive in the U.S. that day. They will return to Warsaw on August 23, 1992.

- Adam Goral - Professor, Maria Curie Skladowska University
- Krzysztof Kaszuba - Professor, Maria Curie Skladowska University
- Grzegorz Bartoszewicz - Instructor, Solidarnosc
- Zdzislaw Krajewski - Instructor, Solidarnosc
- Andrzej Jurgilewicz - Instructor, University of Bialystok
- Boguslaw Plawgo - Instructor, University of Bialystok
- Alicja Unterschuetz - Instructor, Solidarnosc
- Malgorzata Balkowska - Technical Director, D.O.L. Economic Foundation

If you have any questions or comments, please do not hesitate to contact me.

Sincerely,

*M. Catherine Ashmore*  
M. Catherine Ashmore  
Entrepreneurship Program Director

FAX sent  
7/14/92  
22-

178

**ENTREPRENEURSHIP EDUCATION INSTITUTE**

**POLISH COORDINATORS  
USA TRIP**

**ITINERARY  
AUGUST 1, 1992 - AUGUST 23, 1992**

**TRAVELERS:**

ADAM GÓRAL  
BOGUSŁAW PLAWGO  
GRZEGORZ BARTOSZEWICZ  
MAŁGORZATA BAŁKOWSKA

KRZYSZTOF KASZUBA  
ANDREJ JURGILEWICZ  
ZDZISŁAW KRAJEWSKI  
ALICJA UNTERSCHUETZ

**AUGUST 1 - SATURDAY**

Depart from Warsaw, Poland - Delta Airlines Flight 73 - 8:15  
Depart from Frankfurt, Germany - Delta Airlines Flight 25 - 11:30  
Depart from Dallas, Texas - Delta Airlines Flight 1127 - 18:48 CENTRAL TIME ZONE  
Arrive Albuquerque, New Mexico - 19:40 MOUNTAIN TIME ZONE  
Arrive to Santa Fe, New Mexico - via Santa Fe Community College van / Randy Grissom will meet in  
Albuquerque at airport

**HOTEL -** Santa Fe Budget Inn - (505) 982-5952  
725 Cerrillos Road  
Santa Fe, NM 87501

**AUGUST 2 - SUNDAY**

Meeting on the week's SBDC Training - Randy Grissom & Carla Neely  
Short tour & Information on Santa Fe  
Rest

**AUGUST 3 - MONDAY**

Bank of America for Travelers Checks  
SBDC & Incubator Training in Santa Fe  
Santa Fe Community College SBDC office client sessions  
and On-site Business client sessions

**AUGUST 4 - TUESDAY**

**BDC & Incubator Training in Los Alamos**  
Los Alamos SBDC office client sessions  
Los Alamos Incubator operations  
Tour Los Alamos National Laboratories

**AUGUST 5 - WEDNESDAY**

**BDC & Incubator Training in Espanola, Taos & Costilla**  
Northern New Mexico Community College SBDC office client sessions  
Taos office client sessions  
Taos incubator operations  
On-site client sessions to agricultural businesses  
Costilla sewing cooperative visit

**AUGUST 6 - THURSDAY**

**BDC & Incubator Training in Albuquerque**  
Albuquerque TV-I SBDC office client sessions  
Albuquerque TV-I SBDC training session  
Albuquerque Development Capital visit  
Manufacturing Productivity Center visit  
Indian Business Development Center visit

**MOTEL - Airport La Quinta - (505) 243-5500**  
2116 Yale Boulevard S.E.  
Albuquerque, New Mexico 87106

**AUGUST 7 - FRIDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Depart from Albuquerque, New Mexico - Southwest Airlines Flight 468 - 9:10 MOUNTAIN TIME ZONE

Arrive Las Vegas, Nevada - 9:35 PACIFIC TIME ZONE

Drive to Bally's Casino Resort Hotel - via Las Vegas Taxi Mini-Van / COST \$10 - \$12 For ALL 4

*TRAVELERS* - Locate at Ground Transportation Taxi Stand

Gene Gomolka will make contact with *TRAVELERS* at Bally's after 15:00 concerning Conference Information

Attend 1992 Academy of Management Annual Pre Conference Meeting

HOTEL - Bally's Casino Resort - (702) 739-4111  
3645 Las Vegas Blvd. South  
Las Vegas, Nevada 89109

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Depart from Albuquerque, New Mexico - American Airlines Flight 552 - 8:51 MOUNTAIN TIME ZONE

Arrive Chicago, Illinois - 12:29 CENTRAL TIME ZONE

Drive to Hyatt Regency, Chicago - via Continental Transport / COST \$13 PER *TRAVELER* - Locate at Ground

Transportation - Lower Level of Airport Terminal

Gerry Hills will make contact with *TRAVELERS* at Hyatt Regency between 14:30 and 15:00 concerning

Conference Information

Attend UIC/AMA Research Symposium

HOTEL - Hyatt Regency Chicago - (312) 565-1234  
151 East Wacker Drive  
Chicago, Illinois 60601

181

**AUGUST 8 - SATURDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Attend 1992 Academy of Management Annual Meeting

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Attend UIC/AMA Research Symposium

**AUGUST 9 - SUNDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Attend 1992 Academy of Management Annual Meeting

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Attend Summer Marketing Educators' Conference

**AUGUST 10 - MONDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Attend 1992 Academy of Management Annual Meeting

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Attend Summer Marketing Educators' Conference

**AUGUST 11 - TUESDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Attend 1992 Academy of Management Annual Meeting

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Attend Summer Marketing Educators' Conference

**AUGUST 12 - WEDNESDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Bałkowska

Attend 1992 Academy of Management Annual Meeting

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Day Off - Sight Seeing in Chicago



**AUGUST 13 - THURSDAY**

Adam Góral  
Bogusław Plawgo  
Grzegorz Bartoszewicz  
Małgorzata Balkowska

Depart from Las Vegas, Nevada - America West Airlines Flight 687 - 9:00 PACIFIC TIME ZONE  
Arrive Columbus, Ohio - 15:50 EASTERN TIME ZONE

\*\*\*\*\*

Krzysztof Kaszuba  
Andrej Jurgilewicz  
Zdzisław Krajewski  
Alicja Unterschuetz

Depart from Chicago, Illinois - American Airlines Flight 1276 - 13:30 CENTRAL TIME ZONE  
Arrive Columbus, Ohio - 15:45 EASTERN TIME ZONE

Arrive to University Parke Hotel via OSU van - ALL 8 TRAVELERS

HOTEL - University Parke Hotel - (614) 267-1111  
3025 Olentangy River Road  
Columbus, Ohio 43202

**AUGUST 14 - FRIDAY**

Project Organizational Meeting - CETE  
??

**AUGUST 15 - SATURDAY**

Open

**AUGUST 16 - SUNDAY**

Open

**AUGUST 17 - MONDAY**

Project Course & Curriculum Meetings with Consultants  
Detailed Schedule will follow

**AUGUST 18 - TUESDAY**

Project Course & Curriculum Meetings with Consultants  
Detailed Schedule will follow

**AUGUST 19 - WEDNESDAY**

Project Course & Curriculum Meetings with Consultants  
Detailed Schedule will follow

**AUGUST 20 - THURSDAY**

Project Course & Curriculum Meetings with Consultants  
Detailed Schedule will follow

**AUGUST 21 - FRIDAY**

Project Course & Curriculum Meetings with Consultants  
Detailed Schedule will follow

**AUGUST 22 - SATURDAY**

Drive from University Parke Hotel to Columbus Airport via OSU van  
Depart from Columbus, Ohio - Delta Airlines Flight 943 - 17:15  
Depart Cincinnati, Ohio - Delta Airlines Flight 48 - 20:40

**AUGUST 23 - SUNDAY**

Depart Frankfurt, Germany - Delta Airlines Flight 20 - 12:10 EUROPEAN TIME  
Arrive Warsaw, Poland - 13:50 EUROPEAN TIME

**TRAVEL INFORMATION  
CONTACTS, ADDRESSES & PHONE NUMBERS**

**Rodney Terminello, Dan Mertz, Cathy Ashmore & Piotr Korynski**

**CETE**

**THE OHIO STATE UNIVERSITY**

**1900 Kenny Road**

**Columbus, Ohio 43210**

**(614) 292-4353**

**(614) 292-1260 FAX**

**(614) 431-2406 Rod Terminello's Home Number**

**Randy Grissom**

**Carla Neely**

**NEW MEXICO SBDC**

**SANTA FE COMMUNITY COLLEGE**

**P.O. Box 4187**

**Santa Fe, NM 87502**

**(505) 471-8200**

**(505) 471-1362**

**SANTA FE BUDGET INN**

**725 Cerrillos Road**

**Santa Fe, NM 87501**

**(505) 982-5952**

**AIRPORT LA QUINTA**

**2116 Yale Boulevard**

**Albuquerque, NM 87106**

**(505) 243-5500**

**BALLY'S CASINO RESORT**

**3645 Las Vegas Blvd. South**

**Las Vegas, Nevada 89109**

**(702) 739-4111**

**HYATT REGENCY CHICAGO**

**151 East Wacker Drive**

**Chicago, Illinois 60601**

**(312) 565-1234**

186

**UNIVERSITY PARKE HOTEL**  
**3025 Olentangy River Road**  
**Columbus, Ohio 43202**  
**(614) 267-1111**



1900 Kenny Road  
Columbus, Ohio 43210-1090

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

September 1, 1992

Dear Friends:

Thank you all for the opportunity to work together again as we begin Year II of our U.S. AID project in Poland. I thought you would like to see the summary of the comments made by our Polish visitors about the various aspects of their August visit. It seems to have been a very positive experience for them all.

Piotr is working to get copies of the new versions of our materials in the mail to both Malgosia and the Institute that will be doing the translating. This year we are trying to move things faster by shipping to both sites. Piotr has been following up with our U.S. consultants if things are not quite clear. Please let us know if you have any problems with getting the materials together as we agreed.

For those travelling in November to Poland...OSU has decided to pick another travel agent so if you plan to use Connie we must have your travel plans in time to get the paperwork through channels before September 14. This isn't a big deal because there will be another agent assigned, but personally I hate to lose Connie with her cooperative attitude and international knowledge.

I personally want you to know how much I appreciate the hard work everyone put in last week. We had so many details to deal with and so many different things happening at the same time. It was wonderful to see the teamwork we have developed and the spirit of cooperation even under stress. I do believe that this year will be much more productive and that the new Polish-American Entrepreneurship Institutes are off to a great start.

Sincerely,

M. Catherine Ashmore  
Director, International Enterprise Academy

**ENTREPRENEURSHIP EDUCATION INSTITUTE**

**POLISH COORDINATORS  
USA TRIP**

***EVALUATION FORM***

**AUGUST 1, 1992 - AUGUST 23, 1992**

**I. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the SBDC training in New Mexico.**

1.
  - Learning about the organization structure of SBDC (its funding, number of employees) - in Santa Fe, Los Alamos and Espanola.
  - Learning about the network system of local and state SBDC (their relationship, cooperation, report system).
  - Getting familiar with the functioning of SBDC (how they maintain contacts with their clients, how they serve their clients needs - Business Plan writing, courses, consulting).
  - Comparing two incubator structures in Los Alamos and Taos - how they differ, how they evaluate their clients' performance.
  - Learning the structure of Enterprise Development Fund in Albuquerque.
2.
  - Organizational structure of the SBDC.
  - The organizational forms of the incubators.
  - Computers support in training and consulting.
  - Consulting with a help of common accessed data bases (Technet and the others).
3.
  - The very close connection between SBDC and business owners.
  - The structure of SBDC.
  - The very professional staff.
4.
  - The connection between SBDC and incubators
  - The structure of SBDC - centers and sub-centers which are very helpful for small firms all over the state.
  - Useing of bank information for helping SBPC's clients
5.
  - Los Alamos SBDC; tour business incubator; How to create incubator;
  - Terra Madre Organic Farm; Small Farm growing vegetables and herbs - there is a lot of very small farms in Poland;
  - Taos Indian Pueblo - Children's Art Cooperative;
  - Donkey farm - a very interesting idea; Maybe we have to think about the same in our region;

6. - Organizational structure of SBDC  
- The way of counselling  
- Possibility of using TECHNET
7. - Learning about a new organizational structure of SBDC in terms of "small business" training.

II. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?

1. For my work:  
- learning about the structure of SBDC, incubators EDF;  
- learning about their mode of work;  
- gathering instruction materials on structure and functioning of the above institutions.
2. - All of these ideas and concepts are very useful; Computer support is very important.  
- FISCAL - interesting banking and financial system - New Mexico  
- TECHNET - database about companies and sort of production
3. - All I mentioned earlier. It will be very useful for Polish small businesses. Of course we need additional money for this kind of activity (from local or national or international institutions).
4. - All information about SBDC will be very useful for Poland. We need to copy the structure of SBDC in Poland.
5. - Organizational structure of SBDC; How to organize client sessions; Incubator;  
- I think that these ideas will be very useful for our entrepreneurs as well as in our work.
6. - I will do my best to build a similar structure. Only such a structure will help us to survive in the future in our country without capital and with poor small businesses.
7. - I will use all materials I received in terms of promoting and advertising small business trainings. New personal contacts will help me to get training materials, professional literature etc.

**III. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the Management Conference in Las Vegas or from the Marketing Conference in Chicago.**

1.
  - Making contacts with Northern Irish University
  - Learning about the organization of such a conference, the way sessions are organized and led.
2.
  - Great influence of technology information on Management
  - How to organize a big conference
  - Group Decision Support System (networks, decisions, voting etc.)
  - International Programs in Eastern Countries (Post Soviet Union countries, Hungary, Poland)
3.
  - We should pay more attention on teaching and consulting of marketing in our SBIs.
  - The idea to concentrate more attention on consumer behavior was very good.
  - The sessions on international marketing were very useful for me.
  - I visited three stock and trade exchanges and I will use the knowledge I got in my work.
4.
  - The session on transferring American know-how to Emerging Democracies.
  - The sessions on managerial consulting
  - Meeting with very interesting people after sessions.
5.
  - How to organize a big conference, publishers exposition.
  - Meetings with people from other countries.
  - International marketing session.
  - Chicago Mercantile Exchange and Chicago Board of Trade - How the marketplace works.
6.
  - The way of organizing a big conference and the atmosphere of such a conference.
  - Usefulness of statistical modelling in management.
  - Knowledge of the fact that an interest in Polish affairs is still lower.
  - Some meeting which will bring positive effects in the nearest future.
7.
  - Learning about new tendency in marketing researches - consumer behavior
  - New personal contacts.



**IV. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?**

1. - Contacts can be useful in implementing Economic Foundation projects;  
- Knowledge about a conference organization can help me in working on such events in Poland.
2. - All I have already mentioned. We have no experiences in such fields as marketing, stock exchange etc. in Poland. We should remember that these subjects will be our future.
3. - We should pay more attention on consulting in terms of small business owners.  
- We have no experiences in the field in Poland and we need help.
4. - I will use such ideas as:
  - how to teach students
  - how to organize a conference
  - problems in terms of ethics in marketing
  - marketing for children
  - simulation games in marketing courses.- During my free time I visited CME and CBT. It was very interesting.
5. - One from my meetings will lead to prepare a project to develop cooperation between SBI and Business Club in Washington. I hope that in this way we will prove that our courses teach not only our students but also us how to do real business.
6. - How to use computers to improve decision making procedure and strategies.
7. - Using materials received during the Conference in the training program.

**V. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the workshops with the consultants at CETE.**

1. - How to use time efficiently while discussion and work on materials.  
- How to manage a big group of people, when they represent different parties.
2. - New ideas in pricing strategy in marketing.  
- Video tapes in marketing education.  
- Computer software in marketing education.
3. - We improved our T-outlines and materials. We added a very important

subject - export and import - to our courses.

- Catherine Ashmore and her CETE staff taught us how to use teaching methods in our work.

- We had an occasion to compare Columbus Agriculture Fair with Polish fairs.

- We learned how American professors work.

4. - We improved our material and added new subjects.

- We had an occasion to work with American professors.

- We were taught how to use teaching methods in our work.

5. - Feedback on work sessions and activity development.

- Feedback on Business Plan

- Export/import work sessions. Discussions with Piotr Koryński and Martha Cooper.

- Ohio State Fair.

6. - Hope that we are going to build such a structure which will be really useful for small business in Poland

- Export-import module seems to be very promising.

- That fact that we are going to gain our management module (operations management and negotiations).

7. - Training materials useful in the education process. (video tapes).

- Personnel contacts.

- Good opportunity to discuss problems in terms of our Small Business Institute activities.

VI. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?

1. - All.

2. - All of these ideas are very useful and will improve our teaching.

3. - All I mentioned. Our visit in U.S.A. was very useful and will help us to continue our work in Poland. We were able also to include Polish materials to teaching materials. (2)

4. - The facility was well suited to the workshops.

- The project staff of CETE was very helpful.

- I think that the idea of work sessions must be used by our institute.

5. - All I mentioned as they will help our program to be improved.

6. - Training materials will be used in our education process.

**VII. What experiences and activities did you enjoy the most?**

1. - Visiting SBDC, incubators and EDF in New Mexico.  
- Visiting Chicago.
2. - A visit in New Mexico and a conference in Las Vegas.
3. - All I mentioned.
4. - Everything
5. - Santa Fe - SBDC - client meetings; Taos Pueblo  
- A Conference on marketing in Chicago.  
- Feedback on work sessions.
6. - Counselling in Santa Fe - SBDC
7. - A visit in SBDC  
- new teaching materials  
- Making contacts with American instructors.

**VIII. What problems or concerns did you have with this trip?**

1. None. It was well organized.
2. No problems.(6)

**IX. How could we have improved your learning experience?**

1. We should have used time in here more effectively.
2. Computer Support Teaching Course.
3. In this way you have just done.
4. You have just improved.
5. Developing our cooperation.
6. I need more contacts with American business interested in cooperation with Polish firms.

194

7. I needed more time to spend on reviewing materials in terms of small business.

**X. What is your overall impression of this U.S. trip?**

1. - It was a discovery of U.S. for me. I saw different parts of the states and learnt its specifics.  
My impression is positive.
2. - Excellent
3. - Wonderful! Useful! Helpful!
4. - Very, very useful.
5. - As always very useful, fruitful and wonderful.
6. - I liked this trip very much. Time was appropriate, the atmosphere was very good.
7. - Taking the grade 1-2-3-4-5 into consideration I'm putting 4.

**ENTREPRENEURSHIP EDUCATION INSTITUTE**

**POLISH COORDINATORS  
USA TRIP**

**EVALUATION FORM**

**AUGUST 1, 1992 - AUGUST 23, 1992**

I. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the SBDC training in New Mexico.

1.

2.

3.

4.

5.

196

II. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?

1997

III. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the Management Conference in Las Vegas or from the Marketing Conference in Chicago.

1.

2.

3.

4.

5.

IV. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?



V. Please list the 3 - 5 most valuable and useful ideas, concepts and experiences you obtained from the workshops with the consultants at CETE.

1.

2.

3.

4.

5.

200

VI. Please, from this list, tell us which of these ideas, concepts and experiences you will use with your work at the institute and why?

VII. What experiences and activities did you enjoy the most?

VIII. What problems or concerns did you have with this trip?

IX. How could we have improved your learning experience?

X. What is your overall impression of this U.S. trip?

2021





**APPENDIX**

# 6.0

**DEVELOP  
CASE  
STUDIES**

204

# Sukces

# FIRMY

# przykłady

FUNDACJA  
GOSPODARCZA  
NSZZ

*Solidarność*

## PRACA ZBIOROWA

205

## Przykład 1

Andrzej Skrudlik  
Zakład Produkcyjno Naprawczy  
38-200 Jasło  
ul.Kolejowa 9

Firma rozpoczęła swoją działalność w 1989 roku.

Zatrudnia obecnie 40 pracowników.

Zakres prowadzonej działalności:

- naprawy awaryjne i okresowe taboru kolejowego,
- zabezpieczenie antykorozyjne wnętrza zbiorników, cystern,
- produkcja zbiorników i osprzętu dla stacji benzynowej oraz zbiorników dla ochrony środowiska,
- giełda samochodowa,
- myjnia samochodowa (wraz ze sklepem),
- znakowanie pojazdów samochodowych i przedmiotów wartościowych.

Rok 1988 to rok, w którym zapotrzebowanie na wszelkiego rodzaju usługi i produkcję w Polsce ciągle rosło.

Sprostać temu miała zapowiadana nowa ustawa o prowadzeniu działalności gospodarczej przez sektor prywatny.

Niedowład organizacyjny sektora państwowego stwarzał potrzebę dla ludzi tam zatrudnionych do podejmowania rozwiązań systemowych na własny rachunek.

Andrzej Skrudlik zatrudniony w Dyrekcji Eksploatacji Cystern „CPN” na stanowisku kierownika Zakładu Gospodarki Cysternami w Jedliczu, mający pod swoją opieką kolejowy tabor cysternowy w 3-ch południowych rafineriach nafty (Jasło, Jedlicze, Glinik Mariampolski) znał szczegółowo mocne i słabe strony swojego macierzystego zakładu. Brak możliwości finansowych i organizacyjnych nie pozwalał na rozwiązywanie zagadnień technicznego utrzymania zaplecza cysternowego na terenie jego działania. Wagony cysterny musiały być kierowane w inne odległe rejony kraju tak do napraw bieżących, awaryjnych jak i okresowych planowanych. Widząc możliwość uruchomienia w obrębie tych 3-ch południowych rafinerii takiego zakładu naprawczego zaproponował swoim kolegom (Andrzejowi Dzikowskiemu i Piotrowi Sowińskiemu) uruchomienie takiego zakładu w Jasle. Wyrazili oni zgodę i chęć zaangażowania się w prace przygotowawczych i organizacyjnych dla rozpoczęcia działalności naprawczej taboru kolejowego. Obiektem zainteresowania było przejście od PKP starej, przeszło 100-letniej parowozowni w stacji kolejowej Jasło, która od długiego czasu stała nieczynna i bezużyteczna, oczekiwała fizycznej likwidacji.

Obiekt ten był całkowicie zniszczony i zdewastowany, ale z uwagi na posiadane tory kolejowe był obiektem właściwym.

Ustawa o prowadzeniu działalności gospodarczej weszła z życie z dniem 1 stycznia 1989 r. a 20 stycznia 1989 r. Trzej wspólnicy (A.Skrudlik, A.Dzikowski, P.Sowiński) zarejestrowali w Urzędzie Miejskim w Jasle rozpoczęcie działalności gospodarczej na własny rachunek.

Najważniejszym problemem było zdobycie pieniędzy na wyposażenie firmy w niezbędne narzędzia, urządzenia i materiały, oraz stworzenie warunków uzyskania środków na przeprowadzenie generalnego remontu obiektu hali. W tym czasie dużych trudności z pozyskaniem ludzi do pracy na tutejszym terenie nie było. Część pracowników zakład zatrudnił z ludzi zwalnianych grupowo z PKP. Byli to niejednokrotnie fachowcy z długoletnim stażem pracy przy naprawach taboru kolejowego. Pozostała część, a w szczególności spawaczy z wolnego naboru w drodze selekcji umiejętnościowych.

Ponieważ obiekt był w stanie w jakim znajdował się, nie mógł być eksploatowany ze względu na niebezpieczeństwo zawalenia się konstrukcji dachowej, zachodziła potrzeba wykonania ekspertyzy technicznej oraz dokumentacji na jego odbudowę.

Ekspertyza wykonana na zlecenie zakładu Produkcyjno – Naprawczego była pozytywna. Obiekt mógł być wyremontowany.

W związku z tym, po wcześniejszych rozmowach z właścicielem obiektu t.j. Południową Dyrekcją Okręgową Kolei Państwowych w Krakowie, podpisano umowę dzierżawną tego obiektu na 10 lat.

Równolegle z przygotowaniem do prowadzenia remontu obiektu hali, prowadzono pierwsze prace zarobkowe związane z takimi potrzebami jak:



- zabezpieczenia antykorozyjne wewnątrz zbiorników cystern dla potrzeb Polskich Linii Lotniczych „LOT” dla przewozu paliw lotniczych dla nowo zakupionych samolotów Boeing,
- naprawy awaryjne taboru kolejowego,
- fizyczną kasację zakupionych skasowanych wagonów, celem odzyskania zbiorników dla napływających zamówień na cele związane z ochroną środowiska (szamba, zbiorniki magazynowe) i stacje paliw płynnych.

Sprzęt najbardziej potrzebny do prowadzenia tej pierwszej działalności taki jak: spawarki, szlifierki, kompresory, narzędzia – zakupiono z własnych środków właścicieli.

Środków finansowych w tym początkowym okresie ciągle brakowało. Kredyt chociaż dostępny był drogi. Zaszła potrzeba szukania innych rozwiązań pozyskania środków. Uruchomiono nie istniejącą do tego czasu na terenie Jasła giełdę samochodową, myjnię samochodową, oraz sklep spożywczy z zaadaptowanego pudła wagonowego. Wszystkie uzyskane z dodatkowej działalności zyski przeznaczono na wpłaty wynagrodzeń dla ludzi, oraz rozpoczęty remont obiektu.

Zapotrzebowanie na świadczone usługi rosło. Zatrudniono dodatkowych pracowników i uruchomiono pracę na dwie zmiany. Wszystkie prace przy taborze kolejowym w czasie trwania remontu hali prowadzone były na zewnątrz, na powietrzu.

Remont obiektu a to: wykonanie nowego poszycia dachowego, nowych elewacji zewnętrznych i wewnętrznych, wykonanie pomieszczeń socjalnych i biurowych, warsztatu obróbki mechanicznej, kotłowni, magazynu, wykonanie nowych kanalizacji, instalacji świetlnych i zasilających, kompresorowni – trwał 7 miesięcy. W międzyczasie za uzyskane środki z prowadzonej równolegle działalności zakład zakupił zbędne dla PKP i innych państwowych firm takie urządzenia techniczne jak: podnośniki wagonowe „Kutruffa”, tokarnie, frezarkę, piły tarczowe, wiertarki warsztatowe.

Zakupiono specjalistyczne dokumentacje techniczne napraw taboru kolejowego za kwotę 60 mln.zł.

Zakupiono dla zakładu niezbędny nowy transport samochodowy (samochód ciężarowy Star i dostawczy Tarpan).

Część pracowników wykazujących szczególne zainteresowanie zakładem uzyskała niezbędne uprawnienia na specjalistycznych kursach w zakresie: prac spawalniczych urządzeń dozorowych, napraw taboru kolejowego, dozoru technicznego.

W trakcie prowadzenia działalności podstawowej zakładu zachodziły potrzeby rozszerzenia zakresu prac wykonywanych przy wagonach towarowych. W związku z tym wykonano we własnym zakresie w oparciu o posiadane dokumentacje techniczne odpowiednie specjalistyczne stanowiska i oprzyrządowania naprawcze.

Wystąpiono do Dyrekcji Generalnej PKP i Głównego Kolejowego Dozoru Technicznego o nadanie dla Zakładu Produkcyjno – Naprawczego uprawnień do wykonywania prac w zakresie:

- napraw całowagonowych wagonów towarowych,
- rejestracji i napraw wagonów cystern i autocystern przewożących materiały niebezpieczne (paliwa płynne i środki chemiczne).

Po komisyjnych wnikliwych odbiorach przez władze kolejowe i dozoru technicznego zakład uprawnienia takie uzyskał i posiada. Rozszerzono zatem zakres prac. Przyjęto pierwsze wagony do napraw całowagonowych. Od początku postawiono na jakość wykonywanych prac.

Zakład zdawał sobie sprawę, że jako pierwszy w Polsce prywatny zakład wykonujący całowagonowe naprawy taboru kolejowego, gdzie najmniejsze niedociągnięcia związane jest bezpośrednio z bezpieczeństwem w przewozach na sieci PKP – będzie zakładem, który w każdej chwili może przestać istnieć. Takie przeświadczenie starano się przekazać zatrudnionym pracownikom. Jakość i tylko jakość.

W przeciągu czasu zakład zaczął myśleć o specjalizacji w zakresie napraw taboru cysternowego. Odchodzono od napraw innych wagonów towarowych.

W 1991 roku zakupiono od warszawskiej firmy „SOMERW” zezwolenie na wykonywanie oznakowań samochodów wg licencji szwedzkiej firmy SLAS.

Zezwolenie to wykupiono z wyłączością na całe województwo krośnieńskie.

Obecnie wspólnie z policją prowadzi się akcję reklamową dotyczącą zabezpieczeń samochodów tą metodą.

W chwili obecnej Zakład Produkcyjno – Naprawczy w Jaśle zatrudnia 40 pracowników (w systemie pracy dwuzmianowej).

Świadczy usługi naprawcze taboru cysternowego dla dużych przedsiębiorstw państwowych a w szczególności:

- Dyrekcji Eksploatacji Cystern „CPN” w Warszawie,
- Zakładów Chemicznych,
- Fabryk Farb i Lakierów,
- Rafinerii Nafty.

Tego rodzaju prace są podstawowym i głównym dążeniem do osiągnięcia pełnej zdolności produkcyjnej.

Pozostałe wykonywane przez zakład prace a w szczególności:

- produkcja zbiorników dla stacji paliw i ochrony środowiska,
- prowadzenie giełdy samochodowej,
- prowadzenie myjni samochodowej,
- znakowanie pojazdów i przedmiotów wartościowych,

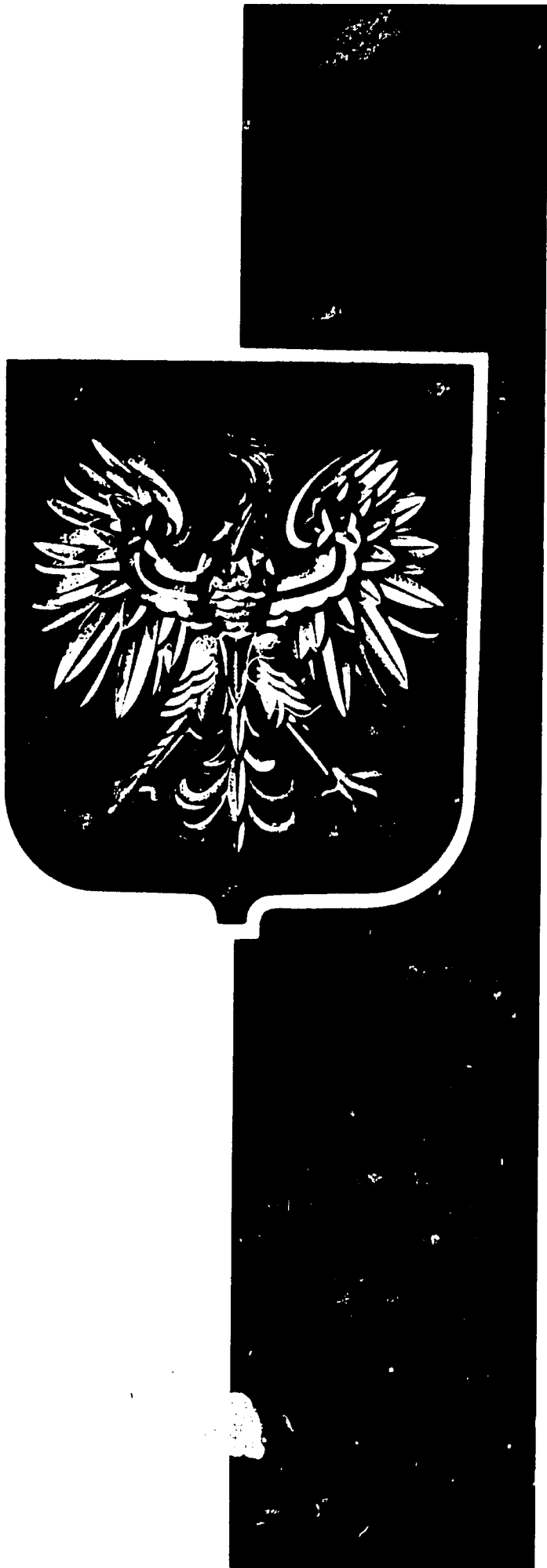
są pracami tymczasowymi, pozwalającymi uzyskać dodatkowe środki na dosprzętowanie specjalizacyjne zakładu.

Zakład posiada opracowany plan strategiczny działania, niemniej jednak istnieje obecnie wiele czynników wewnętrznych i zewnętrznych, które nie pozwalają na pełną realizację zaplanowanych zamierzeń.

## PYTANIA

1. Jakie przyczyny doprowadziły do powstania firmy?
  - wpływ sytuacji rynkowej,
  - ustawa o działalności gospodarczej jako przyczyna sprawcza,
  - znajomość rynku przez wspólników.
2. Specyfikacja działalności firmy Andrzej SKRUDLIK i S-ka
  - znaczenie rozwiązań technicznych,
  - zagadnienie lokalizacji firmy w Jaśle,
  - stan obiektów zakładu państwowego i czynniki umożliwiające ich wykorzystanie.
3. Czynniki ludzkie w procesie tworzenia firmy A.SKRUDLIK w S-ka
  - polityka zatrudnienia jako źródło sukcesu,
  - możliwość wykorzystania bezrobocia jako czynnika selekcyjnego grupy pracowników,
  - przyczyny i znaczenie doszkalania pracowników.
4. Źródła finansowania w rozwoju firmy
  - źródła finansowania w okresie tworzenia,
  - działalność uboczna jako źródło pozyskania środków finansowych na rozwój działalności podstawowej.
5. Etapy rozwojowe firmy A.SKRUDLIK i S-ka
  - przyczyny poszerzania oferty produkcyjnej,
  - rola specjalizacji w procesie zdobywania rynku.





**APPENDIX**  
**7.0**

**DEVELOP  
VIDEOS FOR  
PROMOTION**

- 212 -

**No contents for this section this quarter.**



**APPENDIX**  
**8.0**

**CONDUCT  
PILOT  
PROGRAM**

**No contents for this section this quarter.**





**APPENDIX**  
**9.0**

**TRAIN**  
**FACULTY**

216



FAX

*sent*

*9/28/92*

*CC: Dan  
Cathy A.  
fjs  
Hane B*



1900 Kenny Road  
Columbus, Ohio 43210-1090

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

September 28, 1992

Via FAX

Nina Majer  
U.S. Embassy, Warsaw  
Al, Ujazdowskie 29/31  
Poland

RE: Notice of International Travel Pursuant to AID Grant  
#EUR-0029-G-00-1040-00

Dear Ms. Majer:

This letter is notice of international travel that is required to be given by the above referenced AID grant. The following persons will be visiting Poland to conduct training classes.

Piotr Korynski, Project Assistant; October 5-24, 1992  
Catherine Ashmore, Project Director; November 2-24, 1992  
Rod Terminello, Project Assistant; November 3-11, 1992  
Vicky Rash, Project Assistant; November 2-13, 1992  
Martha Cooper, Consultant; November 8-19, 1992  
Lynn Neeley, Consultant; November 5-14, 1992  
Randall Rollinson, Consultant; November 14-25, 1992  
Gene Gomolka, Consultant; November 14-22, 1992  
Gerald Hills, Consultant; November 14-22, 1992

I would like to meet with you late November 2 or early November 3 to debrief.  
If you have any questions or comments, please do not hesitate to contact me.

Sincerely,

*Cathy Ashmore*

M. Catherine Ashmore  
Entrepreneurship Program Director

217

*Entrepreneurship*  
*Agenda*

**Polish Entrepreneurship Institute  
Agenda**

**Day #1**

(Conducted by American)

Equipment needed: Overhead projector and video player.

- A. Overview of Business Plan - approximately one and a half hour.
- B. Discussion of Entrepreneurial Characteristics - approximately 30 minutes.
- C. Definition of Creativity and the Entrepreneur.  
Complete creative activities  
Discuss Left/Right Brain activities. Approximately one hour.
- D. Discuss Opportunities, Resources, and Successes of Entrepreneurship  
Complete activities and view video tapes. - Approximately one hour.
- E. Overview of Human Relations in Entrepreneurship.  
Complete personality evaluations.  
Complete human relations activities.  
Approximately one hour

**Day 2**

(conducted by Polish)

Equipment needed: Overhead and video player

- A. Overview of Polish Economics and the Entrepreneur  
Approximately one hour
- B. Discussion of Computers and Computer usage in business  
-Approximately one hour
- C. Discussion of Law and the Polish small businesses  
Approximately one hour
- D. Discussion, networking and sharing information about the Entrepreneurship unit.  
Remainder of day spent in discussion.

# Finance

## Agenda, day 1

Points A, B and C - - - - - 1 hour

Points D and E - - - - - remainder of day 1

---

## Agenda, day 2

EXPERTS from Each City Presentation

Experiences AND SUGGESTIONS, Finance Course

Białystok - - - - - 1 hour

Poznań - - - - - 1 hour

Rzeszów - - - - - 1 hour

Discussion - - - - - remainder of day 2

Agenda November 9-10

Rzeszow

Timulic

Additions to "old materials" (brief overview)

- A. Unit 1 -- Strong, clear explanation of why financial records and statements are vital
- B. Unit 4 -- Revised and Expanded format for the presentation of tax information
1. Delineate All Types of Taxes
  2. Filing Procedures -- Forms Submitted and Filing Deadlines
  3. Business Legal Status -- Direct Tax Effects
  4. BASIC COMPUTATIONS -- EXAMPLES
  5. TAX MINIMIZATION VERSUS TAX AVOIDANCE
  6. Advantages of Simple TAX MINIMIZING Decisions  
(spreadsheet software may be used)
  7. The High Costs of Exhaustive Tax MINIMIZATION
  8. SELF COMPUTATION VERSUS USE OF PROFESSIONAL SERVICES  
(PRO. and CONS.)
- C. Unit 6 -- Expansion of "Other Sources of Financing"
1. Off-balance sheet financing
    - a. Cash Management, Good
    - b. Leasing
    - c. Vendor Credit
  2. On-balance sheet financing
    - a. Private
      - ~~i. Factoring, Inventories~~
      - ii. Factoring, Accounts Receivables
      - iii. Venture Capitalists
      - iiii. Finance Companies
      - v. Equity -- stockholders
    - b. Public
      - i. Equity -- stockholders
      - ii. Bonds
  3. Summary

~~D. Unit 3 Break Even Analysis~~

- over -

270

## New Units

~~Unit 7~~

### Time Value of Money

1. Present Value of A Sum
2. ~~Present Value of An Annuity~~
3. ~~Present~~ <sup>Future</sup> Value of A Sum
4. ~~Future Value of An Annuity~~

Unit 8

### Capital Budgeting Techniques

1. Pay Back
2. ← Net Present Value
3. Internal Rate of Return
4. PROFITABILITY Index
- 5.

## Agenda for Import/Export Presentations

### Day 1

9:00-11:00            Overview (9-10:00)  
                      Global Marketing (10-11:00)  
                          Macro Issues  
                          Reasons to Export  
                          Case Example

11:00-11:30            \*\*\*Break\*\*\*

11:30-13:00            Government Regulations  
                          United States versus Poland  
                          Joint Venture  
                          Guest Speakers: Gerber

13:00-15:00            \*\*\*Dinner\*\*\*

15:00-17:00            International Product Policy  
                          Branding  
                          Labeling  
                          Product Characteristics

### Day 2

9:00-11:00            International Communication Policy  
                          Message  
                          Media  
                          Video: CLIO Awards (edited form)

11:00-11:30            \*\*\*Break\*\*\*

11:30-13:00            International Pricing Policy  
                          Terms of Sale  
                          Example: Change in Value (FOB and CIF)

13:00-15:00            \*\*\*Dinner\*\*\*

15:00-17:00            Methods of Payments  
                          Letters of Credit  
                          Bill of Exchange  
                          Guest Speaker: Banker  
                          Barter and Countertrade  
                          Guest Speaker: Trader (Barter)

### Day 3

9:00-11:00            Transportation and Inventory  
                          Customer Service Tradeoffs  
                          Video: Holland Video (Fenton)

11:00-11:30            \*\*\*Break\*\*\*

11:30-13:00            Customs Regulations and Taxes (U.S. and Poland)  
                          Guest Speaker: Customs Officer

13:00-15:00            \*\*\*Dinner\*\*\*

15:00-17:00            Documentation and Insurance  
                          Summary

### Day 4

Import/Export Workshop for Entrepreneurs

9:00-13:00            Selected Topics

222

## Agenda for Import/Export Presentations

### Day 1

9:00-11:00 Overview (9-10:00)  
Global Marketing (10-11:00)  
Macro Issues  
Reasons to Export  
Case Example

11:00-11:30 \*\*\*Break\*\*\*

11:30-13:00 Government Regulations  
United States versus Poland  
Joint Venture  
Guest Speakers: Gerber

13:00-15:00 \*\*\*Dinner\*\*\*

15:00-17:00 International Product Policy  
Branding  
Labeling  
Product Characteristics

### Day 2

9:00-11:00 International Communication Policy  
Message  
Media  
Video: CLIO Awards (edited form)

11:00-11:30 \*\*\*Break\*\*\*

11:30-13:00 International Pricing Policy  
Terms of Sale  
Example: Change in Value (FOB and CIF)

13:00-15:00 \*\*\*Dinner\*\*\*

15:00-17:00 Methods of Payments  
Letters of Credit  
Bill of Exchange  
Guest Speaker: Banker  
Barter and Countertrade  
Guest Speaker: Trader (Barter)

### Day 3

9:00-11:00 Transportation and Inventory  
Customer Service Tradeoffs  
Video: Holland Video (Fenton)

11:00-11:30 \*\*\*Break\*\*\*

11:30-13:00 Customs Regulations and Taxes (U.S. and Poland)  
Guest Speaker: Customs Officer

13:00-15:00 \*\*\*Dinner\*\*\*

15:00-17:00 Documentation and Insurance  
Summary

### Day 4

#### Import/Export Workshop for Entrepreneurs

9:00-13:00 Selected Topics

223



AGENDA

MARKETING MODULE

November 16-17, 1992

OK?

November 16

- 9:00 Presentation and discussion of new Product Unit content and materials G.E. Hills
- 11:00 Presentation of new Channels Unit M. Cooper
- 13:00 Lunch
- 15:00 Presentation of new Pricing Unit G.E.Hills
- 17:00 Conclusion

November 17

- 9:00 Presentation of new Promotion/Advertising Unit G.E. Hills
- 11:00 Presentation of new videos, cases, and simulations for Year 1 Units
- 13:00 Lunch
- 15:00 Discussion: Rzeszow, Bialystok, and Poznan Feedback
- 17:00 Conclusion

224

# Overview

## **POLISH SMALL BUSINESS INSTITUTE AGENDA FOR MANAGEMENT**

### **Day #1 (Conducted by American)**

- |                    |   |
|--------------------|---|
| <b>9:00- 9:30</b>  | <b>Overview</b>                                       |
| <b>9:30-10:30</b>  | <b>Problem solving(Bill Harold case)</b>              |
| <b>10:30-13:00</b> | <b>Negotiations(4 exercises)</b>                      |
| <b>13:00-15:00</b> | <b>Lunch</b>  |
| <b>15:00-16:00</b> | <b>Hiring and firing(Swiss Catering Service case)</b> |
| <b>16:00-17:00</b> | <b>Operations Management</b>                          |

### **Day #2 (Conducted by Polish)**

- |                    |  |
|--------------------|--|
| <b>9:00-10:15</b>  | <b>Conclusions from teaching Management in Rzeszow</b>                 |
| <b>10:15-11:30</b> | <b>Conclusions from teaching Management in Bialystok</b>               |
| <b>11:30-13:00</b> | <b>Conclusions from teaching Management in Poznan</b>                  |
| <b>13:00-15:00</b> | <b>Lunch</b>   |
| <b>15:00-17:00</b> | <b>Brain storm dealing with progress in teaching Management in SBI</b> |

225

# Strategic Planning

(12)

## Agenda items for follow up training session in November, 1992

1. Differentiate between strategic management and strategic planning.
2. Discuss the difference between socialist and free market planning.
3. Differentiate feasibility studies, business planning and strategic planning
4. Introduce role play exercise on how to introduce strategic planning within the firm.
5. Go through suggested steps in introducing strategic planning in the firm.
6. Go through management audit exercise
7. Review material on writing a vision statement
8. Review distinctive competency exercise
9. Review chart with hierarchy of planning
10. Go through goals and KRAs exercise
11. Go through action plan exercise
12. Review board of directors material
13. Go through role play exercise on delegation
14. Review plan presentation steps including assignment on each student preparing a written strategic plan.
15. Review all unit summary, teaching outline summaries and other material changes.

226

## Agenda - Strategic Planning

November 20, 1992

<u>Time</u>	<u>Item</u>
9:00	Discuss the difference between socialist and free market planning.
9:30	Differentiate between strategic management and strategic planning.
9:45	Differentiate feasibility studies, business planning and strategic planning
10:15	Break
10:30	Go through suggested steps in introducing strategic planning in the firm.  Introduce role play exercise on how to introduce strategic planning within the firm.
11:15	Go through management audit exercise
12:00	Lunch
1:00	Review material on writing a vision statement
1:30	Review distinctive competency exercise
1:45	Review chart with hierarchy of planning
2:00	Break
2:15	Go through goals and KRAs exercise
2:30	Go through action plan exercise
2:45	Review board of directors material
3:15	Go through role play exercise on delegation
3:45	Review plan presentation steps including assignment on each student preparing a written strategic plan.
4:00	Review all unit summary, teaching outline summaries and other material changes.
4:30	Adjourn



**APPENDIX**  
**10.0**

**INTRODUCE EXPORT  
MARKETING COURSE**

228

**No contents for this section this quarter.**



**APPENDIX**

# 11.0

**ARRANGE  
WORLD NET  
SEMINARS**

230

**No contents for this section this quarter.**





**APPENDIX**  
**12.0**

**CONDUCT  
POLISH  
NATIONAL  
CONFERENCE**

*2326*

**No contents for this section this quarter.**



**APPENDIX**  
**13.0**

**FINANCIAL  
REPORTS**

224

# Worksheet for Quantitative Data - AID Projects: Central and Eastern Europe (Financial Data, page 1)

Institution: The Ohio State University

Quarter: First, 1992-93 Contact Person Regarding this Report: Cathy Ashmore

Project Component: Enterprise Institutes in Poland

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
	Publishers										
Staff Salaries U.S. (Instruc.)	61.8	82.1							355.8	165.0	55.0
Staff Salaries U.S. (Staff)											
Fringe Benefits	14.6	19.6							89.5	39.0	13.0
Salaries Local											
Consultants	18.3	30.0							101.9	43.3	30.0
Travel - Per Diem	37.5	40.0							193.3	80.1	65.0
Nonexpendable Equipment	0	8.0							19.0	10.3	10.3
Expendable Supplies	1.0	5.0			.5				29.8	16.8	8.0
Indirect Costs	57.2	47.5							274.9	93.7	53.2
Participant Costs											

22

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	<u>Publishers</u>		_____		Actual	Actual	Projected
					Actual	Projected	Actual	Projected			
Workshops, Seminars, Conf.											
Vidco/T.V. Production											
Subcontractors			32.0						541.0	146.0	73.0
Subcontractors											
Subcontractors											
Translation											
Scholarships											
Curriculum Development											
Other Direct Costs	38.8								109.5	-31.8	2.0
Other											
<b>TOTAL PAGE 1 &amp; 2</b>	254.5	422.9			.5				1714.7	562.4	309.5

*de*

**COPY OF ORIGINAL**

**FINANCIAL STATUS REPORT**  
(Short Form)

(Follow instructions on the back)

Federal Agency and Organizational Element to Which Report is Submitted Agency for International Development Office of Financial Management	2. Federal Grant or Other Identifying Number Assigned By Federal Agency  EUR-0029-G-00-1040-00	OMB Approval No. 0348-0039	Page 1	of 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 31-6401599	5. Recipient Account Number or Identifying Number 724951/789185-01	6. Final Report <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7. Basis <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual
--	---	--	---

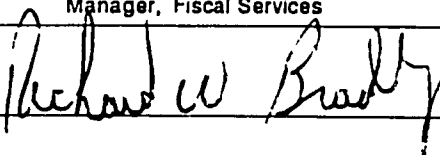
Funding/Grant Period (See Instructions) From: (Month, Day, Year) 5/28/91	To: (Month, Day, Year) 6/20/93	9. Period Covered by this Report From (Month, Day, Year) 7/01/92	To: (Month, Day, Year) 9/30/92
--	-----------------------------------	--	-----------------------------------

Transactions:	I Previously Reported	II This Period	III Cumulative
a. Total Outlays	1,609,785.44	253,649.99	1,863,435.43
b. Recipient share of outlays	149,542.52	(839.07)	148,703.45
c. Federal share of outlays	1,460,242.92	254,489.06	1,714,731.98
d. Total unliquidated obligations			256,085.54
e. Recipient share of unliquidated obligations			0.00
f. Federal share of unliquidated obligations			256,085.54
g. Total Federal share (Sum of lines c and f)			1,970,817.52
h. Total Federal funds authorized for this funding period			2,277,131.00
i. Unobligated balance of Federal funds (Line h minus line g)			306,313.48

Indirect Expense	a. Type of rate (Place "X" in appropriate box) <input type="checkbox"/> Provisional <input checked="" type="checkbox"/> Predetermined <input type="checkbox"/> Final <input type="checkbox"/> Fixed	b. Rate 29%	c. Base 197,278.34	d. Total Amount 57,210.72	e. Federal Share 57,210.72
------------------	--	----------------	-----------------------	------------------------------	-------------------------------

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 Richard W. Bradbury Manager, Fiscal Services	Telephone (Area code, number and extension) (614) 292-1381
Signature of Authorized Certifying Official 	Date report Submitted 10-26-92

*251*

**Year I & II  
Financial Status Report  
(by Subcomponent)**

July, 1991 - September, 1992

Budget Category	Budget*	Federal Share of Outlays	Federal Share of Unliquidated Obligations	Unobligated Balance of Federal Funds
<b>A. Direct Costs</b>				
Salaries/Wages				
Direct Labor	\$520,829	\$82,097	-0-	\$164,982
Fringe Benefits	128,456	19,590	-0-	38,938
Consultants	145,277	18,333	-0-	43,404
Travel/Per Diem	273,355	37,450	**80,971	**963
Expendable supplies and materials	46,624	991	2,114	14,758
Nonexpendable equipment	29,292	-0-	-0-	10,248
Subcontracts/ Subarrangements	687,000	-0-	146,000	-0-
Other Direct Costs	77,652	38,819	2,028	***-33,851
<b>SUBTOTAL</b>	<b>1,908,485</b>	<b>197,280</b>	<b>231,113</b>	<b>237,516</b>
<b>B. Indirect Costs</b>				
Overhead (29% MTDC)	368,646	57,209	24,973	68,798
<b>TOTAL AMOUNT</b>	<b>\$2,277,131</b>	<b>\$254,489</b>	<b>\$256,086</b>	<b>\$306,314</b>

\* Budget revised based on letter of August 11, 1992

\*\* Includes about \$20,000 that will be closed out

\*\*\* Includes expenditures for satellite conference

228