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**Center for Business Excellence  
Management Training for Romania**

**Grant EUR-00290-G-3050-00**

**WASHINGTON STATE UNIVERSITY**  
**and**  
**UNIVERSITATEA "POLYTEHNICA" DIN BUCURESTI**

**Quarterly Report  
July 1, 1995 - September 30, 1995**

**Submitted by:**

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## **CENTER ACTIVITIES:**

The quarter encompassing July 1, 1995 - September 30, 1995 represented an escalation of activities at all four Romanian business development centers as well as an overall strengthening of the project. The substantial improvement in Romanian involvement and leadership in program development and delivery of services noted in last quarter's report continued to strengthen in a number of ways:

- \* The First Annual CBE Network Planning Conference
- \* A Continued Emphasis on Building Relationships
- \* Training
  - > new training contracts
  - > 1995 Management Training Program (MTP2) follow-on plans
  - > development of new material for counselor training
- \* Revision of the Professional Business Certification (PBC) Program
- \* Strengthening of the CBE Infrastructure

The CBE was host to 14 Peace Corp volunteers in July and a group of Danish visitors in September (organized through the Institut Roman de Management). An overview of the Center's objectives and activities was given accompanied by a tour of the facilities.

Leveraging from the expertise of Shannon Alexander, a WSU resident Business Development Specialist, contacts with businesses involved in the tourism industry in the Banat region were established. Shannon headlined a tourism seminar sponsored by the Timisoara Chamber of Commerce in July, and she will continue to work with the Timisoara center to develop counseling expertise in tourism.

## **PERFORMANCE:**

### *The First Annual CBE Network Planning Conference*

The quarter was highlighted by the First Annual CBE Network Planning Conference held in Sinaia on August 10-13. For the first time, nearly all the counselors, directors and support personnel from our four centers were brought together. The main focus of this year's conference was the network-wide establishment and formalized adoption of revised standards and procedures for new counselor training. Participants were able to outline the revised steps that counselors-in-training must complete to achieve both levels of counselor certification.

Key outcomes of the Conference included the establishment of several standing committees, including ones for Directors, Center Development, Research, Training, and Human Resource Development. The Centers began an on-going process of SWOT analysis to stay on top of strengths, weaknesses, opportunities and threats as they relate to center goals.

The establishment of personal linkages between the people at the various Centers holds the greatest promise for fully achieving project goals. By knowing, working with, and respecting the abilities of their counterparts, all members of the CBE Network will become aware of the entire range of resources available to accomplish objectives. The next conference is scheduled for July, 1996.

### *Building Relationships*

Meetings with municipalities and public organizations were a major activity this quarter. The establishment of long-term relationships is necessary to develop support for the work of the Center for Business Excellence and to help ensure its sustainability. Entities visited included:

- \* The Romanian/American Enterprise Fund
- \* Ministry of Youth and Sports
- \* American Cultural Center
- \* AISEC
- \* International Executive Service Corp
- \* USAID
- \* Federation of Municipalities
- \* Romanian Development Agency
- \* ICMA
- \* CRIMM
- \* UNDP
- \* Society of Travel and Tourism Educators
- \* Black Sea University
- \* Mayor of Sector 2 (Bucharest)
- \* Science Technology Society Center (University of Bucharest)

The CBE will continue to foster these relationships in an effort to leverage its activities and to provide an opportunity for future project collaboration.

### *Training*

#### **New Training Contracts:**

Self-sustainability at the CBE moved forward as additional training contracts were signed with ACIDI, FIMAN/PAEM and RODAE Automobile S.A.. The contracts with FIMAN/PAEM and RODAE to provide training in October are valued at a total that exceeds \$14,000.

### **1995 Management Training Program (MPT2):**

Planning for the autumn round of the Management Training for Privatization Program was completed. A two-tier approach, using intensive follow-on training for selected participants from the Spring program and the standard curriculum for first-time participants was decided upon. Final selection of all participants will be completed in early October. Pre-program training and orientation of all Romanian team members who will be managing and implementing the selection, training, consulting, and evaluation of the program was completed. Informational meetings with program nominees in the Bucharest area were held and applications for admission into the program were solicited. The schedule, staffing, budgeting and attendant logistics for the program were finalized as were the focus, timeline, budget and overall strategy.

### *Development of New Material for Counselor Training*

New materials have been developed to enhance the counselor training process. By the end of the Network Conference, a work team had been created to develop a specific series of competency exams and the corresponding coursework counselors-in-training must complete to obtain Professional Business Counselor certification. Finalized counselor training materials will be presented at the quarterly committee meeting of center directors on 1 November.

### *Revision of the Professional Business Certification Program:*

Counselors from all four network centers worked together to establish revised, more relevant standards for PBC certification. Specifically, minimum competencies were developed in the areas of technical knowledge, counseling skills and counselor self-evaluation and improvement methods. The establishment of these standards is significant because it was done entirely by the Romanian counseling team--The people who have the experience and knowledge to accurately define what a “professional counselor” should be in the context of the local situation.

In addition to setting minimum competency standards, the counselors also redesigned the training system that develops these competencies. The former PBC training model (which had not been revised since its inception in 1993) was revamped to reflect the skill and knowledge development needs of the new standards. The most significant change to the original training model was the planned addition of the Training Skills Assessment Test (TSAT). Versions of this test will be administered both before and after a candidate’s training to more accurately assess the individual’s strengths and weaknesses, thereby allowing a more focused program for each trainee.

### *Strengthening of the CBE Infrastructure*

Promotional efforts to increase visibility of the Centers within their respective communities is underway. The CBE fact sheet, brochure, business cards, logo, and letterhead are being updated, and work has begun on a network membership directory

featuring profiles of Center staff members. Articles have been and are continuing to be written for a CBE Newsletter which is expected to be published in October and quarterly thereafter. Work on an informative home page for the CBE World Wide Web/Internet address is also nearing completion.

Office procedures and organization for each of the Centers are being evaluated and improved. This effort includes a program to train staff in basic office management principles. Client enrollment forms are being updated for ease of use in a new database being developed by Mr. Eric Keerbs, one of the WSU interns in Romania this fall.

#### **WASHINGTON STATE UNIVERSITY STAFF:**

Yvonne Rudman, a public administration and human resource specialist who joined the WSU staff in May, completed her assignment in Romania and returned to the US in September.

Jim Marten, formally a Peace Corp Volunteer who worked extensively with the Timisoara Business Center in Timisoara, Romania, has joined the WSU Team as a Business Development Specialist in charge of training. Jim has a Masters of Business Administration (MBA) from Portland State University in Portland, Oregon and a Bachelors of Science in Business Administration from the University of Nebraska with a double specialization in Marketing and Sales Management. Jim is joined in Romania by his wife Jane and daughter Jennifer.

## **SUSTAINABILITY:**

Dr. Robert Tolar and the staff of the WSU SBDC Office of International Programs were invited to meet with Romanian President Ion Iliescu in his hotel suite during his recent trip to Seattle, Washington. During the meeting, Dr. Tolar presented the President with the Romanian Business Case Book published last year. President Iliescu thanked WSU and Dr. Tolar for the excellent work of the Bucharest, Timisoara, and Craiova business centers. The meeting was later broadcast over Romanian television. The invitation to meet with the President and subsequent TV exposure was evidence of the excellent reputation and awareness enjoyed by the joint Romanian/WSU project.

The centers continue to review opportunities for generating funds through consulting projects and training programs. As mentioned earlier, three contracts have been signed to date. Work continues to gain support among municipalities and other public organizations for the work of the Center for Business Excellence. Opportunities to generate income through publishing of business books, articles and texts is being discussed. New synergy between counselors at the different centers (generated by the Network Planning Conference) holds promise for joint authorship.

A proposed uniform schedule of basic fees is being investigated for each center. The respective center directors have been asked to determine the methodology for gaining permission from the respective institutions to charge and schedule such fees.



A timetable has been developed to have completed, written self-sufficiency plans at each Center. The deadline for completion of plans is April 30, 1996.

### **INSTITUTION BUILDING:**

Certainly, the First Annual WSU Business Center Planning Conference was a giant first step toward ensuring the institutionalization of the four business centers. The issues addressed at the Conference (please see Page 2 for more information on the Conference) have all been acted upon and will be incorporated into the 1996 Work Plans currently being designed.

Planning for the Human Resource Center is continuing. Staffing issues and office space for the Center are topics currently being discussed. This issue will be a point of discussion during Dr. Tolar's visit to Romania in October (please see ISSUES on the next page for more detail).

Dr. Mihai Stoica has been introduced to research librarians at the American Cultural Center's Business Resource Center in preparation to his pursuing research duties at the CBE. Dr. Stoica will oversee the establishment of the Center's research capabilities. Augmenting his efforts will be the expansion of the Center's E-mail/Internet capabilities. It is hoped that the CBE, the Peace Corps, and the RDA can work together to link 21 centers throughout Romania via E-mail.

Representatives from the CBE met with two organizations in Arad to explore a future counselor training program for a proposed center in that city. This training opportunity will be pursued over the next few months.

### **ISSUES:**

Finding and renovating space in which to house the Human Resource Center is a continuing issue. Dr. Tolar will be visiting Romania in October and will be meeting with several people (including Mr. Misu Negritoiu, Chief Economic Advisor to the President of Romania) to discuss the HR Center space needs.

In looking at the remaining period of the Romania grant, WSU will need the unobligated amount (\$1,220,924) committed for the period of October 1, 1996 - September 30, 1998 to successfully complete the project.

### **FUTURE PLANS:**

Future plans are numerous and varied. They include:

- \* Pursuing the pilot program with the Peace Corp and RDA to link 21 Centers via E-mail
- \* Continuing to develop and solidify relationships with municipalities and public organizations
- \* Solidifying plans for the sustainability and institutionalization of the centers between now and the end of the grant period
- \* Developing counselor expertise in tourism

- \* Completing job descriptions and work agreements in conjunction with Director Cezar Scarlat for employees at the CBE
- \* Developing a recruiting strategy for the 1996 summer offerings at the Black Sea University.

These future plans will be incorporated into the 1996 workplan which is nearing completion. Each of the centers has been active in preparing the deliverables contained in the workplan, helping to ensure that 1996 is a banner year for the project.

# ***APPENDIX 1***

**1995 PLANNING CONFERENCE  
WSU CENTER FOR BUSINESS EXCELLENCE NETWORK  
SINAIA, ROMANIA  
AUGUST 10-13, 1995**

**1995 Planning Conference  
WSU Center for Business Excellence Network  
An Overview**

**Brett A. Rogers  
Chief of Party**

The Hotel Caraiman in Sinaia, Romania was the site for the first annual Planning Conference of the WSU Center for Business Excellence Network. Beginning with a reception on the evening of August 10, 1995 and ending with a series of informal breakfast meetings on August 13, 1995, more than thirty counselors, office managers, and directors representing all four of the USAID funded Centers gathered with members of the American team to address issues of significance. The Planning Conference signified the first opportunity for our colleagues from Craiova, Timisoara, ASE and UPB to meet face-to-face and establish the personal linkages so necessary for building a true network based on a community of interests.

A full agenda that blended opportunities for socializing with concentrated work on a variety of issues yielded positive results across the board. There was unanimity of support for the goals of the conference and widespread satisfaction with both the concept and implementation of the program. Much of the credit for the positive evaluation received must go to Shannon Alexander. Shannon worked tirelessly to ensure all resources were in place and no details were overlooked. That the conference proceeded smoothly with no apparent glitches was due to her experience as a tourism professional and her dedication to the principles of quality service delivery. In addition to arranging all conference logistics, Shannon organized the development of several standing committees that will be a tremendous asset in reaching overall project objectives.

Jim Marten was responsible for the core of the conference training and was superb in keeping participants on task and achieving closure on two vital areas of program improvement--the Professional Business Counselor certification program and the Management Training for Privatization Program. A natural trainer, Jim was impressive in using a combination of the "stick and carrot" to help conference participants achieve results with significant implications for the continued success of our efforts in Romania. Jim is to be commended for his dedication and commitment as well as for his ability.

Yvonne Rudman did a fine job in organizing a SWOT (Strengths, Weaknesses, Opportunities and Threats) Analysis for each Center. For many participants such an exercise marked the first time in using this kind of assessment tool. Yvonne led them through the process with skill and patience. The collective realization that all the Centers faced some common threats and opportunities and shared some of the same strengths and weaknesses was a particularly beneficial outcome of the exercise. By helping the participants to view their network partners as potential resources, Yvonne played a key role in strengthening newly formed bonds.

Peace Corps Volunteers Kevin Giglinto and Cretia Rowlette, of ASE and UPB respectively, also made valuable contributions to the success of the conference. WSU is fortunate to have access to the business volunteers and routinely benefits from their involvement in network activities.

With all other aspects of the Conference so ably handled by my associates, I was able to concentrate on facilitating dialogue between the Center directors. My goal was to let the directors know that I am serious about creating a real network in which all the Centers have access to resources greater than just those of themselves. I am hopeful that I conveyed my willingness to discuss frankly any topic of concern. I was particularly gratified to gain acceptance of the need for quarterly meetings by the directors. Regular meetings of the directors as peers should foster improved communication and cooperation. By having the meetings on a revolving basis, each director will have the opportunity to serve as host and to showcase the achievements and unique concerns of his/her Center.

An appendix is included that contains a variety of reports, agendas, lists, and criteria that document the activities which took place at the 1995 Planning Conference.

## **APPENDIX**

**Directors Meetings--Topics of Discussion**  
**Standing Committee Assignments**  
**Summary of Results from Training Area**  
**PBC Certification Criteria**  
**MTP Program Summary**  
**SWOT Analysis Results**  
**Conference Welcome Packet**  
**Conference Feedback Form**



**WSU**  
**SMALL & MEDIUM BUSINESS DEVELOPMENT CENTERS**  
**DIRECTORS MEETING**  
**SINAIA ROMANIA**  
**AUGUST 11-12, 1995**

Topics for Discussion:

1. Client Reporting Requirements for AID
  - review new forms
  - review reason for change
2. Work Plan for Fiscal 1996 (October 1, 1995 - September 30, 1996)
  - client hours
  - Human Resources Center
  - Joint Ventures/Technology Transfer
  - counselor training-objectives/certification/re-certification
  - research
3. Progress toward financial self-sufficiency
  - fees for services
  - fees for seminars
  - consulting contracts
  - Yvonne Rudman activities
4. Areas of mutual cooperation
  - MBC/PBC Training
  - MTP training
  - Consulting Teams
  - Committees
  - Publishing/Newsletters/Academic Articles/Books/ARD Newsletter
  - Centralized Mailing List
5. "Center for Business Excellence Network"
  - a. Common Letterhead & Forms
  - b. Common Business Cards
  - c. Create image of unity, network
6. Computer Requirements for Networking
  - a. memory/RAM
  - b. modem
  - c. access via local university/HIEDN
7. Quarterly Directors Meetings
  - a. rotate between centers
  - b. general staff meeting at one of the meetings
  - c. Overall planning Calendar
8. Individual Meetings with Chief of Party (as required)

## STANDING COMMITTEES

### DIRECTORS COMMITTEE

- Quarterly Planning
- Network Communication Issues
- Reporting Issues
- Equipment Needs
- Calendar of Events

### CENTER DEVELOPMENT COMMITTEE

- Public Relations
- Community Relations
- Advertising/Promotions
- Identification Materials
- Newsletter

### TRAINING COMMITTEE

- Training Opportunities within Companies and Organizations
- Internal Training Opportunities for Staff
- New Counselor Training (PBC and MBC)
- MTP Training
- Research and Information gathering on new training techniques

### RESEARCH COMMITTEE

- Research Seminars/Training opportunities
- Secondary Research
- Primary Research
- Internet Information
- Resources and Materials

- Development of Library
- Dissemination of research information among Centers

#### HUMAN RESOURCES/CAREER PLANNING CENTER COMMITTEE

- Human Resource Seminars/Training Opportunities
- Building alliances with Students and Student Organizations
- Building alliances with Government Organizations and Associations
- Development of HRM/Career Services Center
- Research and information gathering on HRM and Career Development

#### CONFERENCE COMMITTEE

- Conference 1996 Planning and Organization
- Conference Proceedings Report for Internal and External Audiences

**COMMITTEE ASSIGNMENTS**  
as of September 26, 1995

**1) Directors' Committee**

Anca Dragoi, Timisoara  
Brett Rogers, WSU  
Cezar Scarlat, PUB  
Florin Radu, Craiova  
Ioan Ursachi, ASE

**2) Conference Committee**

Adrian Zaharescu, ASE  
Doru Mavrodin, Craiova  
Radu Raducan, Timisoara  
Radu Stanciu, PUB  
Shannon Alexander, WSU

**3) Center Development Committee**

Chris Okereh, Peace Corps  
Dana Moldoveanu, ASE  
Doru Mavrodin, Craiova  
Ion Naftanaila, ASE  
Marian Mocan, Timisoara  
Mihaela Minulescu, PUB  
Simona Iovanut, Timisoara  
Yvonne Rudman/Shannon Alexander, WSU

**4) Training Committee**

Amelia Badica, Craiova  
Georgeta Soava, Craiova  
Grigorie Poemog, Timisoara  
Horia Popa, Timisoara  
Ion Naftanaila, ASE  
Jim Marten, WSU  
Marius Dalota, Timisoara  
Radu Stanciu, PUB

**5) Research Committee**

Brett Rogers, WSU  
Cremona Huzum, PUB  
Cristian Popescu, PUB  
Laura Vasilescu, Craiova  
Luminita Vasu, Timisoara  
Mihai Stoica, WSU  
Stefan Tutunaru, PUB  
Lavinia Rasea, ASE  
Tereasa Gandhi, Peace Corps

**6) Human Resources/Career Planning Center Committee**

Adrian Zaharescu, ASE  
Carmen Rotaru, Craiova  
Florin Danlache, PUB  
Oltita Dinu, ASE  
Radu Raducan, Timisoara  
Shannon Alexander, WSU

## 1995 WSU ROMANIA SBDC NETWORK PLANNING CONFERENCE SUMMARY OF RESULTS FROM THE TRAINING AREA

The 1995 Conference was a success in many different ways. In addition to the inter-center relationships that were established and improved, significant progress was made in the training capabilities of the Network. Two key progress areas were in the Professional Business Counselor (PBC) certification program and in the Management Training Program (MTP).

A group of approximately twenty counselors from all four Network centers worked together for two days to establish new and much more relevant standards for PBC certification. Specifically, minimum competencies were developed in the areas of technical knowledge, counseling skills and self evaluation/improvement. The establishment of these standards is significant because it was done entirely by the Romanian counseling team, those that have the experience and knowledge to accurately define what a "professional counselor" is in the context of the local situation.

In addition to setting minimum competency standards, the same group of counselors also redesigned the training system that develops these competencies. The former PBC training model (which has not been revised since its' conception in 1993) was revamped to reflect the skill and knowledge development needs of these new, more relevant standards. Some of the elements of the original model were retained, some areas de-emphasized, others eliminated entirely, as well as new sections being added. The most significant change to the original PBC training model is the addition of the Training Skills Assessment Test (TSAT). This test will be used before and after a candidate's training in order to assess more accurately the individuals strengths and weaknesses, and therefore allow a more focused training program for the each trainee.

Both of these changes were unanimously approved by the center Directors on August 11th, 1995. The actual training curriculum is presently being developed by the Timisoara counseling team with a target completion date of October 1, 1995. The entire Network should be proud of the work that was accomplished by our counselors on this issue. It was a difficult challenge to define and develop this new program, but what was necessary to be accomplished was, and the entire Network will benefit from it.

The other major accomplishment of the Conference was the planning and preparation for the fall 1995 MTP. In the past this program has had significant involvement from the American team in the areas of training and administration. Starting with September of 1995, a significant shift of responsibility will occur with the Romanian team running much of the Program. In particular, four inter-center functional teams were developed to manage key areas of the program. Members from all Network centers will be working together improve and implement the training, counseling, participant selection, and program evaluation of the fall MTP. It is certain that this approach to program development and delivery will improve the relevance, quality and impact of this and many other training programs.

**PROFESSIONAL BUSINESS COUNSELOR**  
**PART A**  
**CERTIFICATION CRITERIA**

**FINAL VERSION: APPROVED AUGUST 11, 1995**

**Section One: Technical Skills / Business Knowledge**

The candidate will be able to effectively work with and teach to others the following

- 1) **Management (R. Raducan and M. Mocan)**
  - 1 1) Human Resource Management
    - 1 1a) Job Descriptions
    - 1 1b) Organizational Charts
    - 1 1c) Performance Appraisal
  - 1 2) Internal Processes and Information Flow
  - 1 3) Competitive Strategies
  - 1 4) Legal Framework
  
- 2) **Marketing / Need for Customer Orientation (L. Vasiu and P. Horia)**
  - 2 1) Provisional Marketing
    - 2 1a) Competitive Analysis
    - 2 1b) Sales Forecasts
    - 2 1c) SWOT Analysis
    - 2 1d) Marketing Research
    - 2 1e) Customer Research
    - 2 1f) Segmentation
    - 2 1g) Marketing Mix
  - 2.2) Operational Marketing
    - 2 2a) Distribution
    - 2 2b) Promotion
    - 2 2c) Negotiation
  - 2.3) Marketing Strategy Development
  
- 3) **Finance ( M. Dalota)**
  - 3 1) Financial Statements
    - 3 1a) Income Statement
    - 3 1b) Cash Flow
    - 3 1c) Balance Sheet
  - 3 2) Financial Analysis
    - 3 2a) Break Even Point
    - 3 2b) Ratio Analysis
    - 3 2c) Interrelationships between 3 2a and 3 2b
  - 3 3) Taxes
  - 3 4) Different Payment Methods and Instruments
  - 3 5) Budgeting

- 4) **Research (I. Petrisor, G. Pocinog, and M. Minulescu)**
  - 4.1) Center (Internal) Information Resources
  - 4.2) Outside (External) Information Resources
  - 4.3) Text Editor Computer Programs
  - 4.4) Data Base Use
  - 4.5) Efficient Use and Improvement of 4.1 - 4.4

Knowledge of these topics will be demonstrated through the achievement of a satisfactory score on the Training Skills Assessment Test (TSAT) which is a written test for each of the above sections. This series of four tests will be given to the trainee prior to training. If the trainee achieves a satisfactory score on some or all of the section tests, those sections will be waived from the individual training program.

### Section Two:            Counseling Skills

- 1) Interviewing Skills including
  - a) Active listening and client appraisal
  - b) Questioning (appropriate use of yes/no, open and close ended questions to get information and guide client meeting)
  - c) Balancing verbal and non-verbal communication tools to transmit message that counselor is giving his/her client full attention
- 3) Identifying Real Client Problem vs. Symptoms
- 4) Establishing Priorities for client
- 5) Identifying options or scenarios for client to choose from
- 6) Assigning tasks (monkeys) for client and counselor
- 7) Following up with client, keeping in touch, moving overall client progress forward by stimulating next counseling cycle
- 8) Adapt communication level to match that of client
- 9) Increase self confidence of client

Competency in this skill area will be evidenced by observation on part of co-counselor as indicated in co-counseling reports or on training record sheet.

### Section Three:            Counselor Self-Evaluation

- 1) Repeated, continuous demonstration of use and competency in the following process
  - a) Identification (through analysis of past counseling sheets/records) of personal strengths and weaknesses as a counselor
  - b) Continuous self-examination as to adherence to Center Code of Ethics
  - c) Creation of a personal improvement plan to correct weaknesses and reinforcement of strengths complete with specific action steps and timetable
  - d) Implementation of (c) and observed sustained correction of problem and/or improvement of skills

Competency in this area will be evidenced by observation on the part of the co-counseling team and indication of such on co-counseling sheets.



**PROFESSIONAL BUSINESS COUNSELOR**  
**PART B**  
**CERTIFICATION TRAINING PATH**

- 1) At least five hours of observing a PBC or MBC prior to beginning training.

*GOAL: Provide the trainee with an initial exposure to a wide array of counseling situations so that the information presented during the training will have increased relevance and understanding.*

- 2) Completion of the Training Skill Assessment Test (TSAT) which will indicate areas where the counselor has satisfactory skills and which modules he/she needs improvement on. This test will be composed of four separate examinations covering the four key sections of the Technical Skills Business Knowledge part of the Certification Criteria. Based upon the results of this test, the needed training modules will be determined for the candidate. These modules will then be scheduled and taught by appropriate training team member. In order to complete the Technical section of the training, the trainee must either receive a satisfactory score on each of the four modules prior to or at the conclusion of training.

*GOAL: Assess the strengths and weaknesses of the trainee and to focus the training efforts so as not to cover unnecessary material and to cover needed areas in significant depth to allow trainee to meet requirements.*

- 3) Assignment of training sponsor/mentor that must be a MBC or PBC within their Center who will be the main coach and tutor for the candidate during the process.

*GOAL: To provide the trainee a constant source of information and advice on how to most effectively complete certification training. It should be emphasized that the mentor/sponsor is there to guide the trainee through the process, not do all of the training. Specialists should be used for training and other ABC's or PBC's should be used for co-counseling. By all means the sponsor/mentor should be a part of this as needed, but not to do all of the training or co-counseling work.*

- 4) Completion of a MINIMUM of 20 hours of co-counseling with either Master or Professional Business Counselors under the following guidelines:

- a) Work with a minimum of 3 to a maximum of 5 MBC/PBC to complete co-counseling requirements.
- b) With each separate MBC/PBC, a minimum of 3 to a maximum of 5 separate sessions with each.

*GOAL: This should be mostly self-explanatory. This area is basically where the counselor learns to counsel. Emphasis must be placed on pre and post counseling sessions as a method of teaching the use of the counseling methodology. It is the responsibility of the co-counselor to see that the trainee's skills are developing, and not just "collecting hours."*

5) One informal feedback interview with co-counselor and Mentor/Sponsor after completion of 10 to 15 hours of co-counseling to assess progress of training, and discuss any problems or concerns the candidate might have at this stage. Results of this interview should be communicated to the WSU team as soon as possible.

*GOAL: To gain some mid-program feedback from the trainee in order that needed changes might be made either to the individual trainee's certification program or to the overall program. The results of this interview have no bearing on the eligibility for certification other than to make improvements in the program.*

6) Creation of a business plan that meets either of the following requirements:

a) A "commercial" plan based upon information from a successful proposal submitted to and approved by an external financing organization (banks, ARD, PHARE, etc.)

b) A plan for the future operations of the trainee's individual Center

*GOAL: To demonstrate understanding of the technical components of the training. Since a majority of the counseling work done by the Centers involves business planning (not necessarily creation of business plans), it is imperative that the trainee be capable of producing one on his/her own. This document can also be used in the final interview to demonstrate his/her depth of understanding of the necessary technical areas.*

7) Two weeks prior to the candidate's Certification Review, the following documents must be submitted to the Certification Panel for their review:

- a) Business Plan Project
- b) Copies of all co-counseling records
- c) A brief (one page or less) letter from the sponsor/mentor describing the candidate's strengths and weaknesses observed during training
- d) Copies of successfully completed TSAT examinations

*GOAL: To give the review panel sufficient time to prepare questions and to make the most of the interview time.*

8) Final interview with the following panel:

- a) Center Director
- b) Candidate Mentor/Sponsor
- c) At least one member of the co-counseling team
- d) Member of the American CBE staff

*NOTE: The composition of this panel is designed to give a multitude of perspectives on the strengths and weaknesses of the counselor/trainee. The Director represents the interests and quality standards of the Center, the sponsor can relate experiences with the trainee during the entire training process, the co-counselor can relate specific observations of the trainee during actual counseling work, and the American represents the interests and quality standards of the WSU SBDC program. The decision should be of a consensus nature, whether to grant certification or to recommend further training or practice. In other words, the panel must jointly decide what to do with the trainee.*

The purpose of this meeting is for the trainee to demonstrate knowledge and understanding of the counseling process as well demonstration of necessary technical knowledge. This interview will have the following components:

A) Two reports, in conjunction with co-counseling team, demonstrating ability to concisely summarize

- 1) An instance of performing well as a counselor
- 2) An instance of performing poorly as a counselor

B) Satisfactory reports from the co-counseling team as to the progress on the observable criteria as noted above

C) Responses to "what if" questions and/or performance under role play simulations that demonstrate the necessary technical and counseling skills.

# 1995 MANAGEMENT TRAINING PROGRAM

## PROGRAM SUMMARY

**Program Duration:** September 1995 - December 1995 (See attached Schedule)

**Location:** MTP1 Bucharest  
MTP2 Brasov and Timisoara

### Staffing Needs:

A) Training Team

- Lead Trainer experienced in Total Quality Management principles
- Customer Research trainer
- Teamwork / Communication trainer
- Presentation Skills trainer

B) Selection Team

3 - 5 people

C) Evaluation Team

3 - 5 people

D) Counseling Team

5 for companies in Bucharest area

2 for companies in Brasov area

2 for companies in Timisoara area

### Compensation:

See attached Agreement

GAANT.MTP

TASK	August				September					October					November				December			
	4	11	18	25	1	8	15	22	29	6	13	20	27	3	10	17	24	1	8	15	22	
Cooperative agreements done	X			X																		
Nomination List				X																		
Team Selection				X																		
Team Training					X	X																
Invitations to nominees						X	X															
Program Intro and Applications						X	X															
Participant Selection								X														
Company Analysis									X													
Session #1 material develop									X		X											
Session #1								X		X												
Session #2 material develop											#1											
Session #2																						
Session #3 material develop										X		X		#2								
Session #3																						
Presentations and Certif.												X			X					#3		
Program Evaluation																					FINISH	
Company Counseling										X											X	
																					X	
<b>MTP 2 - FOLLOW ON PROGRAM</b>																						
Company invite and application						X		X														
Company selection									X													
Needs analysis												X										
Program Development											X											
Program Delivery												X										
Conclusion												X									X	
Evaluation																					X	
																					X	

# CURRICULUM

## SESSION ONE

9 HOURS

### Section One 3 Hours

- 1.1a) A NEW WAY OF DOING BUSINESS
- 1.1b) QUALITY IMPROVEMENT CONCEPTS
- 1.1c) THE IMPROVEMENT PROCESS, AN OVERVIEW
- 1.1d) LEARNING TO WORK TOGETHER

### Section Two: 3 Hours

- 1.2a) STEP ONE OF PROCESS IMPROVEMENT: DESCRIBE THE PROCESS
- 1.2b) MISSION/PURPOSE/FOCUS OF A TEAM

### Section Three 3 Hours

- 1.3a) REVIEW OF DAY ONE MATERIAL
- 1.3b) HOW TO RUN SUCCESSFUL PROJECT TEAM MEETINGS
- 1.3c) REDEFINE STEP ONE: DESCRIBING THE PROCESS
- 1.3d) GROUP BRAINSTORMING/MULTI-VOTING EXERCISE

### HOMEWORK:

- 1) Redefine mission of project team and Company
- 2) Redo flowchart with individual processes
- 3) Speculate about customer needs and concerns

## **SESSION TWO**

9 Hours

### Section One: 3 Hours

- 2.1) IDENTIFICATION OF CUSTOMER NEEDS/CUSTOMER SURVEYS

### Section Two: 3 Hours

- 2.2) IDENTIFICATION OF CUSTOMER NEEDS/House of Quality

### Section Three: 3 Hours

- 2.3) STEP TWO: PLAN AND MAKE CHANGES

#### HOMEWORK:

- DO: Have each team member interview at least five internal customers
- DO: Write summary of customer survey results
- DO: Rough Draft of Improvement Plan

## **SESSION THREE:**

9 hours

### Section One: 3 Hours

- 3.1a) REVIEW OF HOMEWORK
- 3.1b) ELEMENTS OF PRESENTATION OF IMPROVEMENT PLANS

### Section Two: 3 Hours

- 3.2a) CRUCIAL FUTURE IMPROVEMENT EFFORT ACTIVITIES

### Section Three: 3 Hours

- 3.3a) PRESENTATION OF IMPROVEMENT PLANS
- 3.3b) AWARDING OF CERTIFICATES AND MAIL IN EVALUATIONS

**1995 MANAGEMENT TRAINING PROGRAM  
LETTER OF AGREEMENT**

The following is intended as clarification of the roles and responsibilities of participants in the 1995 Management Training Program (MTP). It is understood that not all participants will be performing all of the duties listed below.

**SECTION ONE: JOB DESCRIPTIONS AND DUTIES**

**COUNSELOR**

The counselor will be primarily responsible for ensuring client completion of homework and training projects. The counselor's minimum responsibilities are as follows:

- 1) Contact client prior to first training session to introduce him/herself and to gain a firm understanding of the client company.
- 2) Either attend training sessions or study the prior session training materials in conjunction with the Training Director before meeting with a client. This is intended to allow the counselor to most effectively assist the client in the completion of the homework.
- 3) Ensure that the **client teams** produce the following outputs in accordance with program requirements.

<b>OUTPUT</b>	<b>DEADLINE</b>
a) Brief analysis of company SWOT	Oct. 20
b) Produce process flowchart of benefit delivery system	Nov 3
c) Identify project team mission	Nov 3
d) Identify process improvement project	Nov 3
e) Summary of customer needs based upon actual customer research and contact	Nov 24
f) Process improvement plan	Dec 8

- 4) Provide the client teams with a minimum of six hours of counseling during each of the following time periods:
  - a) September 29 - October 20
  - b) October 20 - November 10
  - c) November 10 - December 8
- 5) Provide the Training Director with all counseling reports and necessary feedback as to the progress of the client teams and needed improvements to the program.



## TRAINER

The trainer is the primary designer and coach of the learning experience for the client teams. As such, it is the responsibility of the trainer to work with the Training Director to prepare materials and techniques to maximize the learning of the client teams. During the course of this project, the Trainer will

- 1) Consult with the Training Director prior to designing any training materials or presentations to ensure an understanding of the objectives of this program and necessary training guidelines
- 2) Two weeks prior to training date, submit proposed materials to Training Director in conjunction with Instructor Guidelines worksheet (Section Three) to ensure congruency with overall course materials and objectives. At that time, the Trainer will inform the Training Director of any needed materials, supplies, and equipment. Every effort will be made to accommodate these needs
- 3) Provide all materials for training in typewritten form (preferably on disk) so that translation and duplication can be accomplished quickly and effectively

## SECTION TWO: COUNSELOR / TRAINER COMPENSATION

Depending upon the nature of the participation in this program, compensation or expense coverage will fall into the three categories listed below. Unless otherwise specified in writing, the following is the only compensation or expense coverage available in this program. All payments will be made direct to counselor within two weeks of payment request. Counselor will be responsible for any tax liability related to these payments

### 1) Counseling Time:

Defined as time spent consulting with a participant teams of the MTP program at their business location. This compensation schedule will be in force only during the time period of the training program. Payment will be made upon presentation of counseling report form and WSU SBDC Request for Payment form

<b>Counselor in Training</b>	<b>5,000 Lei / Hr.</b>
<b>Professional Business Counselor</b>	<b>8,000 Lei / Hr.</b>
<b>Master Business Counselor</b>	<b>10,000 Lei / Hr.</b>

**2) Per Diem:**

Defined as money for expenses related to meals and local transportation when the counselor is required to travel outside of their respective city. This does not require the submission of any receipts for meals or local travel. This payment can only be made if a Request For Travel Authorization has been approved prior to the travel.

Each day or portion of a day working outside of the city in which your center is located  
**25,000 Lei / Day**

**3) Training Time:**

Defined as time spent conducting training activities in front of program participants in regularly scheduled group training sessions. This is designed to compensate time involved in material development and delivery.

Each half hour conducting training according to program guidelines and format requirements:  
**10,000 Lei / Half Hour**

**4) Travel Expenses:**

Expenses for hotels and transportation between cities will be paid for either on a "as occur" or reimbursable basis. Receipts stating the name of the vendor, date, and amounts must be furnished in conjunction with a prior approved travel authorization.

The above conditions are understood and agreed to by the following parties from the date of signing until December 31, 1995.

\_\_\_\_\_  
Participant

\_\_\_\_\_  
WSU Training Director

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Section Three: Instructor Guidelines**

Each Training Session should be well planned to ensure an effective learning experience for the client  
For each session please follow this worksheet to make sure that key training points are covered

Session number \_\_\_\_\_

Session title: \_\_\_\_\_

Goal of session: \_\_\_\_\_

Conceptual/theoretical material to be presented:

Visual aids to be used (the more the better)

What presentation equipment will you need (Black board, etc.)

Handouts to be used:

Romanian case example

American case example:

Application/Exercise:

What kind of participant feedback will indicate that your training objectives are being met?

Please briefly outline your segment presentation with time allocated to each topic

TOPIC

TIME ALLOTTED

- 1.
- 2.
- 3.
- 4.
- 5.

**TO: Brett Rogers**  
**Chief of Party, Romania**  
**cc: Yvonne Rudman**

**FM: Shannon Alexander**  
**Business Development Specialist, Romania**

**RE: 1995 Planning Conference, SWOT Summary**

September 7, 1995

Please find the attached SWOT materials gathered at the 1995 Planning Conference. Each CBE Network center developed an individualized SWOT document, and used this document in: 1) their center presentations and 2) the development of a network-wide SWOT document.

After reviewing the center and network SWOTs, Yvonne Rudman and I decided that it would be important to have each center monitor their progress in addressing center strengths, weaknesses, opportunities and threats on an ongoing basis.

As a result, I have developed a notebook for each center, complete with the following: a typed copy of their individual August 1995 SWOT document to use as their starting point, a typed copy of the network SWOT to remind that many of the same issues are relevant to all centers, a blank SWOT document for every month until the 1996 Planning Conference, and a blank worksheet to track center goals and activities that address the issues detailed in the monthly SWOT document. If used as intended, this notebook should be a working tool throughout the month for center planning. It is not meant to keep as a neatly typed document for recording past events, but rather a tool for organizing ideas and keeping them at the center director's fingertips for constant reference.

At this time, I have presented this notebook only to Cezar Scarlat. His feedback was positive, and he made some valuable changes to the format of the document. The PUB center director plans on combining the center SWOT materials with his own individualized worksheets to track counselor workplans. We have agreed to evaluate whether or not this is a valuable and practical working tool during the coming months.

I will be discussing the notebooks and their use with each center director during my center visits. Particularly important will be implementing either this or some variation of it at the Craiova center. Yvonne and I found the SWOT that this center developed for the Planning Conference was rushed and not thought out in advance (although the centers were notified in advance of the conference of our intention to collect SWOT documents from each center). Hopefully, some *written* form of strategic planning will be put into place at this center with a bit of pressure from the American team.

Please note that the Timisoara center's SWOT is currently being translated by one of the counselors. This SWOT was by far the best of the conference and will be forthcoming to you next week.

3

**SWOT ANALYSIS**  
**CBE NETWORK**  
**PLANNING CONFERENCE**  
**August 1995**

**STRENGTHS**

Strengths presented separately by each center during their Center Presentations at the conference.

**WEAKNESSES**

- Lack of communication (internal and between Centers)
- Lack of database for business information/consultants
- Lack of physical space
- Faculty time constraints
- Need of a protocol fund for juice, coffee, etc.
- No full-time counselors
- No pricing strategy
- Lack of agreement between centers and counselors -- payment, job descriptions
- Lack of relationships with banks and other organizations (city councils, city halls, ministry)

**OPPORTUNITIES**

- Current interest in training programs by external organizations
- Creation of business incubators provides opportunity for business training
- Create a certification program for business owners and managers
- Collaboration with other organizations
- Provide consulting for international investors, i.e. American investors
- Use Peace Corps to expand seminars, center locations and training radius
- Opportunity to involve students more by: internships, research projects, developing new clients, valuable linkage between centers and universities
- Contact with other international centers outside of Romania
- Internet connection to access information--clients, marketing, center development, human resources
- EC Integration
- Specialization of centers
- Assistance in human resources management and student services, i.e. job fairs

**THREATS**

- Support post-USAID funding -- sustainability
- Lack of community awareness about types of services
- Competition with consulting companies and other donor programs
- Legislation -- laws are changing rapidly
- Legal status of consultants

**SWOT ANALYSIS**  
**P. U. B.**  
**August 1995**

**STRENGTHS**

- Counselors and training expertise
- Good facilities
- Internal information resources
- Good relation with other organizations (outside of our network)

**WEAKNESSES**

- Lack of communication (internal and between Centers)
- Lack of minimum standards for counselors' work
- No secretary
- Not enough promotion
- No agreements between the center and counselors describing responsibilities and payment

**OPPORTUNITIES**

- Organizational chart
- Position within the University
- Privatization process (increasing our market)
- Cooperation with Infotin (job fairs) = new market segment

**THREATS**

- "Small interests" of each center and individual
- Sustainability

GOAL	TASK/ACTIVITY	DEADLINE

## SWOT ANALYSIS

A. S. E.

August 1995

### STRENGTHS

- Counseling
- Seminars
- Assistance in development of business plans and business management

### WEAKNESSES

- Expert services such as financial analysis, mkt. research and training programs due to limited time that counselors can spend in the Center (almost all are faculty)
- Not enough developed level of some resources--need for one 486 computer, video cassettes, video camera
- Lack of linkage to data base, and lack of network between Centers

### OPPORTUNITIES

- Training programs (business)
- Governmental and non-governmental programs for financial assistance
- Services for small and medium size enterprises (including business plans)

### THREATS

- The location of the Center--the building will be repaired and we do not know when
- The support which the Center needs from the government--RIDA, Ministry of Education--in financial and organizational terms

GOAL	TASK/ACTIVITY	DEADLINE
Managerial and Economic training from entrepreneurs	Seminars and training program	September 15 - December 15
Starting of new businesses and strengths of existing	Assistance and expert services	
Center's resources development	<ul style="list-style-type: none"><li>• Finish PBC and MBC training</li><li>• 486 computer, video cassettes, textbooks, legislation</li></ul>	<ul style="list-style-type: none"><li>• October 31st</li><li>• November 15th</li></ul>

**SWOT ANALYSIS**  
**CRAIOVA**  
**August 1995**

**STRENGTHS**

- Complex team with high level of knowledge --marketing, management, analysis
- Good internal relationships within Center

**WEAKNESSES**

- Database of SMEs lacking
- Relationships between local and central organization--administrative government

**OPPORTUNITIES**

- Main clients graduating from the University--easy client access, easy promotional effort, defined market segment
- Expand activity outside of Dolj

**THREATS**

- Lack resources for financing to perpetuate center
- Regulations regarding consulting centers
- Minimum equipment may not meet standards

GOAL	TASK/ACTIVITY	DEADLINE



**SWOT ANALYSIS**  
**TIMISOARA**  
**August 1995**

**STRENGTHS**

- Among the first business centers in Timisoara
- American collaboration is different from European collaboration
- Financial independence (d p d.v. of Romanian state)
- Provide free services to customers
- Provide seminars to customers
- Good office location in the center of Timisoara
- Counselors have American training
- Team is good at team work
- Have permanent activity at the center
- Integrated program
- Good relations with ARD
- "Permanent" help from American team
- Counselors able to balance theoretical knowledge with practical knowledge
- Clients come from various areas
- Have close relationship with Chamber of Commerce
- Have permanent Peace Corps Volunteer
- Have office phone, fax and copier
- Counselors have various areas of specialties
- Have access to many firms' information and case studies
- Benefit from personal professional experience
- Opportunities to visit centers in USA
- Counselors have obtained high level of expertise
- Good image in and around Timisoara
- Good future for center
- Certification diplomas are a good stimulus
- Confidentiality in relation with clients
- American team's concern with development of team work

**WEAKNESSES**

- Old computers
- Not enough publicity
- Not enough money for counselor payment
- Targeting only SMEs
- Impossible to develop bigger projects (feasibility studies, evaluations)
- Part-time schedules in office
- No full-time counselors
- Insufficient training in some specific areas of activity
- Bad working relationship with banks
- Inconsistent business plans received from banks
- Activities mediation
- Lack of space for consulting

- Insufficient office amenities (curtains, protocol)
- No Internet connection
- Lack of opportunity to use Chamber of Commerce facilities/information
- Need regular meetings with center staff, counselors
- Lack of relationship with other centers (Romanian and foreign)
- Need of larger fund for protocol
- Insufficient resources: magazines, catalogs, lists of firms
- No close examination of counselor's activity (test, analysis of work's quality)
- No clear offensive strategy
- No systematic program for seminars

**OPPORTUNITIES**

- Access to financial support from Romania, USA, Phare funds
- Internet connection
- Assure consulting for big investment in Romania
- Database for counseling process
- General rules of cooperation between center and Chamber of Commerce
- Cooperation with similar firms from other countries for consulting
- Counselors specializing in different fields

**THREATS**

- Growing number of new, private consulting firms (new competitors)
- Mentality regarding consulting process from private Romanian firms
- Position of the top management team at the University regarding counselors' time
- Competition with counselors at Chamber of Commerce who offer same services to the client
- Financial future of the center after the contract with USAID/WSU is complete
- New laws and inflation

GOAL	TASK/ACTIVITY	DEADLINE



# SWOT EVALUATION

P. U. B.

September 1995

GOALS:	TASKS/ACTIVITIES:	DEADLINE:	COMPLETION:



# *WELCOME PACKET*

**1995 PLANNING CONFERENCE  
SINAIA, ROMANIA  
AUGUST 10 - 13, 1995**

**FAX COVER SHEET**  
**WASHINGTON STATE UNIVERSITY**  
**Small Business Development Center**  
**Office of International Programs**  
401 West 13th Street, Vancouver, WA 98660-2806  
Telephone: [360] 787-2021 Fax: [360] 696-6431

**TO:** All Counselors of the Center for Business Excellence Network  
*Academy of Economic Studies, University of Craiova,  
Polytechnic University of Bucharest, Timisoara  
Chamber of Commerce and Industry*

**FROM:** Bob Tolar

**DATE:** August 10, 1995

**SUBJECT:** Congratulations and Best Wishes!!

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As you gather for your First Annual Conference, please accept the very best wishes of the Washington State University Small Business Development Center for a successful and joyful gathering. We all wish we could be with you to celebrate your past successes, and as you discuss plans for the future of your individual centers, the CBE network, and small and medium enterprise development of Romania.

We offer thanks to each of you for your participation in the project, often under most trying circumstances. We congratulate you on the vision for Romania's economic future you have expressed and in which you have invested your time, talent, and energy.

As you raise the first glass of wonderful Romanian wine, please think for a moment of the many Washington State University faculty and staff who wish they could be with you!

*Bob*

**Noroc!!**

*Leslie*

*Willie*

*Jim*

---

Total number of pages, including this cover sheet: 1

*Jim*



*Planning Conference Participants*

*Adrian Zaharescu  
Anca Dragoi  
Brett Rogers  
Carmen Rotariu  
Cremona Iluzum  
Cretia Rowlette  
Dorin Cosma  
Doru Mavrodin  
Dumitru Constantin  
Florin Danalache  
Florin Radu  
Grigorie Pocinog  
Horia Popa  
Ion Naftanaila  
Ioan Petrisor  
Ioan Ursachi  
Jim Marten  
Kevin Giglinto  
Laura Vasilescu  
Liana Colcea  
Luminita Vasii  
Marian Mocan  
Marius Dalota  
Mihaela Minulescu  
Oltita Dinu  
Radu Raducan  
Radu Stanciu  
Shannon Alexander  
Simona Ivoanut  
Stefan Tutunaru  
Yvonne Rudman*



***Dear Planning Conference participants:***

Welcome! The following details should help you enjoy your stay in Sinaia. We're looking forward to a very productive 1995 Planning Conference.



**Hotel**

We are staying and meeting at the Hotel Caraiman. The address is Bvd. Carol I, number 4, and the telephone number is 044.31.20.51. Your accommodations and meals (see below) have been paid for in advance by WSU. However, any telephone charges, bar bills or extras will be your responsibility to pay individually upon departure. Check out time is noon on Sunday, unless other arrangements have been made by you personally with the hotel.



**Attire**

The dress for the entire conference will be casual. No suits and ties, please! We want you to be as comfortable as possible. Our meals will also be informal, and should not require any special dress other than perhaps a light jacket or sweater to guard you against chilly evenings.



**Meals**

- There will be an informal reception on Thursday evening in the Sala de Protocol from 7:00 p.m. to 9:00 p.m. The Sala de Protocol can be found on the first floor of the hotel (etajul I). Snacks and soft beverages will be provided by WSU. Wine will also be provided, but as a personal welcome from the American team. Any other alcoholic beverages can be ordered directly from the hotel bar and paid for individually.
- Breakfast will be provided on Friday, Saturday and Sunday in the hotel restaurant. Service begins at 7:30 a.m. You will receive a breakfast voucher ticket for each day that will permit you to order directly from the hotel's breakfast menu. WSU has paid for these tickets in advance, and each breakfast ticket has a value of 5.000 lei. If you exceed 5.000 lei, you will need to pay the hotel for the





difference. (None of the meal tickets are valid at the hotel for any other dates of stay, and credit will not be given to WSU for any meals ordered under the arranged value of the ticket.)

- Lunch will be provided on Friday and Saturday in the hotel restaurant, or perhaps on the terrace if weather permits. We have selected a limited menu with three choices for the main course on each day. Please see the Menu Details page in your Welcome Packet.
- Dinner on Friday night will be just outside of town at Restaurant Cumpatu. Please be down in the hotel lobby at 6:30 p.m. to depart for the restaurant. Remember, we will be seated on the terrace, so please bring a light jacket or sweater.
- Dinner on Saturday night will be provided in the hotel restaurant. You will receive a dinner voucher ticket with a value of 15.000 lei, allowing you to order from the restaurant menu. Again, if you exceed the value of the dinner ticket, you will need to pay the hotel for the difference. For this meal, please make your table reservations directly with the restaurant. Meal time will be at your convenience.



### Touristic Information

- If you would like to visit Peles or Pelisor, the hours are from 9:00 a.m. to 4:00 p.m. The entrance fee is 1.000 lei for Romanians.
- If you would like to enjoy a cable car ride, it operates daily from 8:00 a.m. to 5:30 p.m. The fee from Sinai to Cota 1400 is 1.500 lei for Romanians. The fee from Cota 1400 to Cota 2000 is 1.000 lei for Romanians.

*We're looking forward to the first annual Planning Conference!*



## Menu Details



### Mic Dejun in Hotel

Puteti alege ce doriti din meniul restaurantului, cu conditia de a va incadra in suma de 5.000 lei/pers.



### Dejun in Hotel

La alegere unul din urmatoarele 3 feluri:

*vineri, 11 august, 1995*

*'Rasol de Vaca cu Legume si Mustar  
sau Pulpe de Pui la Gratar  
sau Cabanos Garni*

*sambata, 12 august, 1995*

*Sarmale cu Mamaliga  
sau Fieetei de Pasare Garni  
sau Smitel Parizian Garni*



### Cina la Restaurantul Cumpatu

La alegere unul din urmatoarele 4 feluri:

*Sarmale de Pore cu Mamaliga  
sau Trigarne Asortata Garni cu Cartofi Praiiti  
sau Triptura de Pui cu Pireu de Cartofi  
sau Muschi de Pore Garni*



### Cina in Hotel

Puteti alege ce doriti din meniul restaurantului, cu conditia de a va incadra in suma de 15.000 lei/pers.



## CONFERENCE FEEDBACK

*Dear Conference Participants:*

*Please take a moment to fill out the following questionnaire. Your suggestions and feedback will help the Conference Committee to organize the logistics for the 1996 Planning Conference. Please fax your responses to Shannon Alexander at fax number 401 312 9581. Thanks for your help!*

1) Did you find your accommodations adequate for the conference?

yes

no

What improvements would make the accommodations more comfortable next year?

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2) Were the conference facilities conducive to productive meetings?

yes

no

What improvements would make the conference facilities better next year?

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3) Were the meals satisfactory?

yes

no

What improvements would make breakfast better next year?

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# ***APPENDIX 2***

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY - JULY 1995  
PREPARED BY BRETT ROGERS - WSU CHIEF OF PARTY**

**INSTITUTION BUILDING:**

- Began organizing for the First Annual WSU Business Centers Planning Conference in Sinaia.
- Chief of Party training in Pullman provided closer ties with the Controller's Office and SBDC Financial personnel.
- Series of meetings between Director of International Programs and American Team has renewed focus and improved morale.
- Continued to work with and through government agencies, NGO's, PVO's and academic institutions to accomplish program goals.

**SUSTAINABILITY:**

- Continued to review opportunities for generating funds through consulting projects and training programs. Proposals submitted to Transylvania POF, ACIDI and the Federation of Private Businesses in Arad.
- Continued to monitor efforts by Yvonne Rudman to develop support among municipalities and other public organizations for the work of the Center for Business Excellence.
- Participated in two meetings with UPB Vice-Rector Berbente to assure installation of Internet cable and to confirm availability of Computer Engineer Tutunaru to serve as Systems Operator. Fee-based research should be possible in the near future.

**IMMEDIATE IMPACT:**

- The connection to the Internet has profoundly expanded our capability to deliver relevant research in a timely manner. Decision-makers will benefit from having current data readily available.

**HIGHLIGHTS:**

**Completed:**

- E-mail for all staff members at the Center for Business Excellence is available.
- Planning Conference is organized for August 10-13 in Sinaia.
- Subcontract issues and delay in invoice payments resolved.
- New members of the American team in place and becoming productive.

**Planned:**

- Implement Network reporting system for all 4 centers.
- Begin preparation of work plan for 1996.
- Extend E-mail service to our centers at ASE, Craiova and Timisoara

**SBDC International Programs, WSU Vancouver  
Romania Project Activity, July 1995  
By: Yvonne Rudman**

**Institution Building:**

Preparation for Ministry of Labor Meeting: Florin, Shannon, Yvonne

In preparation for a meeting with Mr. Muresan with the Ministry of Labor, we met to establish a strategy which would demonstrate the benefits of collaboration to both the ministry and the CBE. The Ministry could benefit from (1) internal management training seminars; (2) assistance in human resource development programs, i.e. training their constituency how to write their C.V.s, how to interview; and (3) to enhance their public relations. An ongoing relationship with the Ministry would contribute to the sustainability of the CBE.

Mr. Muresan is currently in Paris. When he returns in August we will schedule a meeting.

Preparation for Series of Meetings with Ministries and Municipal Governments: Bob Tolar, Cezar, Yvonne.

The following ministries and municipal governments were targeted as agencies which are engaged directly or indirectly in economic development with whom a mutually beneficial relationship could be formed. CBE could assist the agencies in accomplishing their educational and economic development goals. Through a long term relationship with these agencies the sustainability of CBE efforts in business development would also be enhanced.

Ministries:	Labor Unions
Labor	Secretary of State
Education	Sector Governments
Youth and Sports	Bucharest Municipal Government
State Reform	
Tourism	

The focus of these meetings will be: How can CBE work more closely with the ministry or agency to carry out economic development?

Romanian/American Enterprise Fund, Brett and Yvonne

Nicolae Ivan suggested the possibility of the CBE to administer the RAEF Micro Loan Fund. Brett and I met to consider the benefits and liabilities of such a proposal. Areas of consideration were:

- Staffing requirements to implement and maintain program.
- Client screening process, i.e. responsibilities of CBE to conduct due diligence procedures.
- Compensation for administering Micro Loans with different scenarios.
- Relationship to RAEF Director
- Possibility of first consideration for companies who have been counseled at CBE

Assignment in Romania, January 1996

Bob Tolar and I met to discuss the possibility of me continuing my work on the Romanian project. A final decision will be made the first week in September.

Meeting Agenda with Mihael Minulescu

Mihaela and I met to make a list of agencies that we should visit together which are vital to the sustainability of the Center and also vital contacts for the clients that she works with. We have agreed to meet with the Romania Chamber of Commerce and the Romanian Guarantee Fund and the Romanian Development Bank. As time is short and Mihaela goes on vacation this coming week, we may not visit all of them at this time but continue our work in January.

Analysis of PBC candidates and trainees, MBC candidates and trainees, Jim Marten, Yvonne

Jim and I sorted through his records and made a list of the current status of all Romanian counselors currently involved in the WSU training program. A list of counselors and their current status is attached.

Aligning personnel availability and specialization with the new training contracts the CBE is soliciting is an important component of the planning process.

Center of Business Excellence promotional material, Mihaela Minulescu, Cezar, Shannon, Yvonne

The Center is in need of stationary and promotional materials listed below.

- Logo
- New business cards
- Letterhead
- Envelopes
- Informational brochure, both in b/w and color, with current info
- Booklet with photos and long term description of center
- Annual report
- Joint sponsored advertisement

When Mihaela returns from her vacation we will continue with the planning process and locate a graphic artist and printer.

American Staff Meeting

The primary focus of the meeting was the upcoming meeting for all four centers in the WSU network. Shannon and Jim have undertaken the detailed organization of the Conference in Sinaia.

Craiova Romanian/American Business Center

While Bob Tolar was in country, the American staff visited the Craiova office with him. The intention was to strengthen the ties between the two Centers and to view their operation first hand. During our visit we toured the facilities at the University; visited the CRIMM center with whom the Center works on a regular basis; and also had an on-site visit with one of the clients, a foam rubber manufacturer.

1995/7 Peace Corps Volunteer Tour of CBE

Fourteen Peace Corps volunteers came to CBE. Brett, Cezar and Jim gave an introductory talk and afterwards Shannon and I joined in giving the volunteers a tour of CBE facilities. We won't know for several weeks which three volunteers will be assigned to the WSU project.

Center Research capabilities, Mihai Stoica

Bob Tolar discussed the possibility of Mihai working in the CBE as a business researcher. In meetings with the Federation of Municipalities and the Ministry of Youth and Sports they specifically asked whether we had research capabilities. If Mihai joins the Center's efforts we will be able to respond to many requests in the business and government community.

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## Sustainability:

### Ministry of Youth and Sports, Mr. Serban Ursu, Cezar, Yvonne

Within the Ministry of Youth and Sports there is a department called INFOTIM which has ten areas of information that it collects and disperses to the youth of Romania through a nation wide network of centers. The areas of concentration as outlined in their literature are:

- |                           |                              |
|---------------------------|------------------------------|
| -Education                | -Sport; tourism              |
| -Professional development | -Youth in the World MONDOTIN |
| -Work relations           | -Health                      |
| -Associative life         | -Practical life              |
| -Spare time               |                              |

Cezar and Mr. Ursu discussed the human resource seminar which was cosponsored by INFOTIM and the CBE. Mr. Ursu gave Cezar a copy of seminar conclusions and recommendations compiled by INFOTIM. Mr. Ursu then asked whether the CBE would like to continue the collaboration with another seminar in September or October.

After he described the goals of INFOTIM and we described the CBE in more detail, the following projects were cited as potential services which the CBE could provide for INFOTIM.

- 1-Another Human Resources seminar for youth regarding job procurement (Sept/Oct)
- 2-Management training for INFOTIM staff of 40 to 50 (Oct/Nov)
- 3-Research on Employment and Industry Trends
- 4-Seminar courses on Entrepreneurship (Jan 1996)

INFOTIM has a budget for training programs. Cost for these programs was not discussed but it was established that these services would be provided for a fee.

### American Cultural Center, Dale West

Returned to the Center with the intention of giving Lili Stoian information about the National Director's Conference, introducing her to Sharon and meeting the director of the Center, Dale West. We learned more about the Center's research activities and subscribed to their monthly news packet regarding current economic and business news about Romania. We also were told about a directory of associations in Romania that we may have access to.

### AISEC, Mihaela Bunescu

I went to AISEC to investigate whether the developing CBE placement center could coordinate efforts with AISEC to train students in interviewing techniques, c.v. preparation, job seeking strategies, and other skills necessary for career development.

AISEC, in Romania since 1990, is a student organization which facilitates international exchanges and job development for students whose areas of study are primarily economics and business. Presently, this chapter has six interns placed overseas.

AISEC appears to be a very dynamic and productive organization. In April of 1995 they hosted 'Career Days' in the Salat Palatui. Twenty seven companies paid to participate in this job fair. Between 400-500 students attended the fair. Companies conducted preliminary interviews at the fair and invited a select group of students for follow-up interviews at their firms. Ms. Bunescu is faxing me a list of the companies who participated in this fair.

Another impressive accomplishment of the organization is that they competed with Denmark to host the 1995 European Conference for AISEC and won the bid. From August 18-25, 1995 AISEC will host 250 students from thirty seven European countries in Bucharest. Sponsors from the private sector and the government for this event include: Xerox, Coca-Cola, Deloitte-Rouche, Arthur-Anderson, Royal Marine and Mircea Cosea of the State Ministry for Reform.

**AISEC con't**

AISEC has representation on campuses throughout the country. Ms. Bunescu is a member of the national board and was very enthusiastic about the possibility of AISEC and the CBE Human Resources Center working together both in Bucharest and in other cities.

**International Executive Service Corps, Ileana Slavencscu**

The IESC has been active in Romania since 1992 in three areas: development of managerial and technical expertise; business development; and marketing. The possibility of working with IESC on these projects is no longer possible because the program will be terminated in September of 1995.

While speaking with Ms. Slavencscu, I learned about ICMA projects coordinated through the USAID office. These projects are conducted at the city and judet level. As she was unfamiliar about the economic development component of these projects, she suggested that I talk with Alina Popescu the coordinator of public administration programs at USAID.

**USAID, Alina Popescu, Coordinator, Public Administration Programs**

Since Ms. Popescu is the overall coordinator for programs for USAID in Romania she is a valuable resource of information about past or current programs which may be of interest to CBE's efforts to establish contacts with the public sector.

Among the organizations/programs that she thought would be significant for us to meet are:

- 1-ICMA
- 2-Association of Judet Councils
- 3-Federation of Municipalities
- 4-Foundation for Local Development and Public Services.

Also included in the list were the names of some mayors who have been especially progressive or have attended international conferences. They include: Mr. Moruzi, mayor of Brasov; Mr. Savulescu, mayor of Ploesti; Mr. Philip of Oradea and Mr. Pomponiui, mayor of Sector 1 in Bucharest.

She gave us a copy of Law #69 which is the current public administration law for the country. This law has a provision for the dismissal of elected mayors by the government if they are perceived to be inviolation of government mandates. Many city governments in Romania are currently suspended while the cases are waiting to be heard in court.

The city of Oradea conducted a needs assesment survey in all major segments of society. Health, education, cultural, police, political and business community leaders were asked to prioritize their areas of concern for municipal development. The results will be incorporated into an economic development plan for the city. Without formal training is stakeholder involvement, Mr. Philip has created an environment which is very conducive to sustained economic development.

Alina also suggested we talk with Scott Johnson who is the coordinator of public administration projects in Romania.

**Federation of Municipalities, Ileana Pascal**

The Federation was organized in 1991 with KNOW HOW FUND support with the intention of facilitating communication between municipalities throughout Romania. Currently, there are 86 members.

In early 1995, the Federation conducted a nation-wide survey consisting of the following questions:

- 1-Besides the mayor, who is your contact person?
- 2-What are the areas in which you need assistance?
- 3-What assistance have you received already and from whom?

### Federation of Municipalities con't

All of the municipalities responded. The information has been collated but is confidential.

The Federation holds quarterly meetings during which proposed legislation, common difficulties and potential solutions are discussed. The next conference is scheduled for July 19, 20, 21, 1995 in Brasov. The mayor of Brasov is president of the Federation, the mayor of Piatra Neamt is vice-president and the mayor of Sibiu is secretary/treasurer.

In the follow-up meeting, we will discuss the results of the Brasov meeting, further inform FoM of CBE's services and continue the discussion about the CBE providing internal training for municipal government staff and providing business consultation for local economic development projects as they develop.

### Federation of Municipalities

In this followup meeting, Shannon met Ms. Pascal and we all discussed the results of the FoM meeting in Brasov. The main focus of the meeting was Law 69. It was agreed that the Law needs modification and tactics for lobbying Parliament were discussed.

Ms. Pascal gave us a copy of the Council of Europe's recommendations for local and regional authorities of Europe. (These recommendations are written in French.) We were also given a synopsis of FoM activities which are focused in the following five areas:

- 1-Completion of research studies analysing the current situation in Romanian local government.
- 2-Mounting of specialized seminars to identify and analyze problems and develop solutions.
- 3-Design and mount publicity and support building campaigns.
- 4-Preparation of briefing notes and disseminate them throughout local governments.
- 5-Design and mount short training courses for more efficient local government operations.

Ms. Pascal stated that the organization is in need of a seminar on public/private linkages and asked whether the CBE would be able to provide it. I believe that when I return in January, I would be able to conduct a seminar which would discuss links between local governments, business development centers and economic development in the private sector.

She also stated that training on the Internet would be needed for internal staff.

### National Conference on the Development of the SME's Consultancy and Services Centers' Network

## Sector 1 con't

PIET sponsored Mr. Pomponiui's attendance of a month long workshop in Vail, Colorado to study executive administration. He has also attended conferences in Budapest and Sofia which covered topics such as infrastructure financing, housing issues and public/private sector linkages.

Currently, the most comprehensive program that sector 1 is involved in is the creation of indoor markets where open markets now exist. Objectives of this program are to create sanitary conditions for the sale of vegetables, meats, fruits, and dairy products; maintain low prices for food; and to expand the selection of foods available. The enclosed Dorobantilor market is a prototype of a converted market. The Matache market near Gara de Nord is the first market in sector 1 to be considered for renovation.

Before our visit Mr. Pomponiui was unaware of the CBE and the services that it offered. There are two potential ways in which the CBE and Sector 1 can collaborate: (1) referral of clients by the Mayor to the CBE, and (2) as the Sector develops the indoor market some vendors may need CBE assistance in drawing up their business plans or in locating sources of financing for improvements.

Romanian Development Agency, Angela Balan, Calin Siriteanu, Shannon, Yvonne

This meeting was held to:

- 1) discuss the National Director's Conference
- 2) offer an article for the ARD newsletter
- 3) discuss the market development project for Sectors 1,2, and 5.

In regards to the Conference, Mrs. Balan and Mr. Siriteanu told us that committees have been formed to respond to the recommendations presented by attendees at the end of the conference. Specifically, training standards for counselors, minimum standards and services, and the legal status of centers will be addressed.

Mr. Siriteanu recommended that the American model of government business development is more in line with the needs of Romania at the present time since European models have a largely regional focus. He also said that local authorities such as mayors, prefectures and councils need to recognize business development centers by giving them space for operations, sharing information, documentation, access to equipment and to 'implement them in local development projects'.

Both RDA officers were very interested in our upcoming Center network conference and wanted to open our meeting to other donor organizations and themselves. We suggested that they discuss this with our Directors.

We will be submitting an article for the ARD publication.

The ARD is very interested in supporting the development of outdoor markets into sanitary, protected indoor markets. We will keep them informed of the progress of the project.

ICMA, Gabrielle Matei

Ms. Matei described the projects that ICMA coordinates in Romania. They focus on six cities in six areas of interest.

Brasov	1,2,4	1 Waste disposal
Craiova	1	2 Condo development
Foscani	1,4,6	3 Budget and Finance
Constanta	1	4 Computer/GIS
Oradea	1,2,3,4,6	5 Citizen participation
Piatra Neamt	3,5	6 Public private partnership

Most of the programs that ICMA coordinates has an economic development component to it. In Brasov they contracted out to university faculty in the fields of economics, law, technical assistance and public relations for municipalities. Ms. Matei believes that Polytechnica University and the other universities in our network could also serve as consultants for their business development components.

**ICMA con't**

ICMA is in the process of creating a directory of development organizations operating in Romania and has asked the Bucharest, Timisoara and Craiova offices to fill out a form so they will be included.

She also suggested that I meet with Mr. Anton of the Center for International Private Enterprise which is an affiliate of the US Chamber of Commerce.

**Immediate Impact:****Highlights****Completed:**

Sector government meeting, introduced idea of CBE involvement in enclosed market project  
Ministry of Youth and Sports, INFOTIM request for training, joint H.R. seminars, and research on industry and employment trends  
Meeting in Craiova to discuss client reporting  
ICMA, entry of WSU program in the national donor directory they are compiling  
RDA, expressed support for concrete development projects undertaken by CBE, i.e. enclosed markets  
USAID, established intention to coordinate business development components of their public administration programs  
Federation of Municipalities, expressed need for internal training and seminar on public/private links

**Planned:**

Sector government meetings

Follow-up meetings with contacted organizations

RDA market meeting

Chamber meeting with Mihaela

Carmen Vlaicu, psychologist with the University of Bucharest

Holiday schedule permitting, meetings with:

General Directors of Economics and International Relations, Municipal governments

Foundation for Local Development and Public Services, Anna Vasilache

International Center for Entrepreneurial Studies, Ion Anton

July 1995

## Counselor Current Status

Professional Business Counselor  
candidates/trainees

<u>location</u>	<u>name</u>
c	Mamut Eden
ase	Mincu Carmen
ase	Dinu Oltita Camelia
ase	Rus Aura
cbe	Constantin Dumitru
c	Pomazan Valentin
c	Dumitru Adrain
c	Gogan Adina
cbe	Ardella Dan
ase	Stancu Dan
tim	Cosma Dorin
tim	Dalota Marius
cr	Badica Amelia
tim	Dragoi Anca
ase	Zahurescu Adrian
tim	Popa Horia
tim	Pocinog Grigorie
cbe	Manca Gheorghe

## Professional Business Counselors

<u>location</u>	<u>name</u>
tim	Raducan Radu
tim	Taroata Angel
cr	Florin Radu
cr	Maurodim Doru
cr	Soava Georgetta
cr	Rotariu Carmen
cr	Vasilescu Laura

Professional Business Counselors  
completed Master Business Counselor training  
only need counseling hours

<u>location</u>	<u>name</u>
cbe	Minulescu Mihaela
cbe	Danalache Florin
cbe	Bodo Francis
cbe	Popescu Cristi
ase	Ursachi Ioan
ase	Naftila Ioan
tim	Rasca Lavinia

## Master Business Counselors

<u>location</u>	<u>name</u>
tim	Vasiu Luminita
tim	Mocan Marian
cbe	Stancu Radu
cbe	Scarlat Cezar

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT REPORT: JULY 1995**  
**BY: SHANNON ALEXANDER**

**HIGHLIGHTS**

**Completed:**

- Established face-to-face contact with directors and counselors all four Romanian/American Centers.
- Headlined a tourism seminar sponsored by the Timisoara Chamber of Commerce on July 12th.
- Established a contact at the Timisoara Chamber of Commerce interested in future educational programs on Tourism.
- Established contacts with businesses involved in tourism industry in the Banat region of Romania.
- Obtained working e-mail/Internet access through the Center for Business Excellence.
- Developed action plan with the Romanian counselor in charge of Public Relations for CBE identity and promotional materials.
- Attended first National Conference for SME Consulting Centers.
- Developed a better understanding of Public Administration and the role of local government in Romania by meeting with several organizations working in this arena.

**Planned:**

- Finish all preparation for 1995 Planning Conference for Romanian/American centers.
- Attend 1995 Planning Conference with the goal of strengthening our network of Romanian/American Center.
- Meet with Timisoara Center director, Anca Dragoi, and counselor Marius Dalota about the development of a tourism educational program in cooperation with the Chamber of Commerce. Schedule time with Timisoara counselors to meet with Timisoara businesses interested in follow-up counseling on the subject of Tourism.
- Contact international tourism organizations for information and research.
- Contact Human Resources professionals and educators to begin gathering information for the center.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT ACTIVITY JULY 1995**  
**BY: SHANNON ALEXANDER**

**INSTITUTION BUILDING:**

*Definition: Helping develop capacity within institutions to better address needs in the transition economy and the free market economy to come. This may include faculty and administrator training, developing new programs (e.g., MBA, human resource management, continuing education, etc.)*

- **CBE Internet Training:** I attended session for American team with the CBE's technology expert, Stefan Tutunaru. During this session, we set up our e-mail accounts at the CBE, encoded our passwords, practiced sending e-mail, and got on line with the Internet. My goal is to become proficient at using the Internet to conduct information searches and to use our network of centers to share that information across the country. For example, an informal follow-up meeting yielded information on international job opportunities that would benefit students seeking information at any one of our centers.
- **An Introductory Visit to Craiova:** I established my first contact with the Romanian/American Business Consulting Center at Craiova University during two-days of meetings between the American team, led by Dr. Robert Tolar, and Craiova's Romanian team. The goals were to increase the strength of our network of centers, as well as to talk specifically about the center's resources, needs and future plans. Topics covered included: Craiova's client reporting system; the center's current library resources and future needs; counselor training and certification standards; regional opportunities for business counseling and training seminars outside of Craiova; the development of a type of "Fast Track" business training program; the need for fostering cooperation with other consulting organizations, such as CRIMM; the importance of counselor participation in local clubs and organizations; and the team's eagerness to participate in the development of a strong and sustainable network of Romanian/American centers.
- **The Development of Promotional/ID Materials:** I organized a meeting with Romanian counselor, Mihaela Minulescu, CBE Director, Cezar Scarlet, and American team-member, Yvonne Rudman to discuss the development of promotional materials for the center. The CBE's goal is to eventually develop all of the following: a logo that is easier to reproduce and that better represents the center; business cards of better quality; letterhead and envelopes; a short, general brochure describing the center and its activities; a booklet complete with photographs and more detailed information about the center that has a longer shelf life; an annual report; and standardized advertising materials. Mihaela is the lead counselor responsible for these projects, with the American team lending as much support as needed. Project One is to develop the logo and letterhead for use as soon as possible.
- **Meeting with the Peace Corps Recruits:** The team met the new crop of Peace Corps recruits and hosted them at the CBE. CBE Director Cezar Scarlet, WSU Chief of Party Brett Rogers, and Training Director Jim Marten gave an informal presentation about the CBE, ASE and Timisoara centers to the recruits. Cezar and the American team fielded questions, asked questions and then took the recruits on a tour of the CBE facilities. The goals were to find a good fit between the assigned volunteers and each of the centers, and to stress that the Romanian/American centers would like to stay in touch and share resources/information with all of the volunteers wherever they are based.



**Romania Project Activity  
S. Alexander for July 1995**

- **1995 Planning Conference Development:** I am working on the lodging, meal, reception, and meeting details for the First Annual Planning Conference for the Romanian/American Centers to be held from August 10th to the 13th.

**SUSTAINABILITY:**

*Definition: The capacity of the host country to carry on a program after USAID funding and US trainers are gone. This is a philosophical commitment to the program as well as a willingness to commit financial and human resources necessary to perpetuate it.*

- **The National Conference of SMEs:** I attended all seminars presented at the National Conference on the "Development of the SME's Consultancy and Services Centers' Network" in Bucharest on July 6th and 7th. My goals were to support the idea of cooperation and communication between all centers nationwide, to learn as much as possible about other centers and the issues all centers have in common, to make contacts within other centers, and to become familiar with the RDA and its activities. I made good contacts with CRJMM representatives, especially the Director of Public Relations, Mr. Octavian Lupu and with Angela Balon of RDA and her staff.
- **Meeting with the American Cultural Center:** Yvonne Rudman and I met with Lili Stoian, the reference librarian at the American Center to discuss their plans for the development of a business library and how we might work together to gather some of the necessary information. I am now on Lili's mailing list for business-related articles that come across her desk. We, in turn, will forward to her any information about business groups and organizations working in Romania. Yvonne Rudman and I were introduced to the Center's director, Mr. Dale West.
- **Meeting with Alina Popescu at USAID:** I accompanied Yvonne Rudman to a meeting with Alina Popescu, Project Management Assistant at USAID. My purpose in going was to be introduced as a contact during Yvonne's absence this fall. The results of this meeting for me were: a better understanding of the existing structure for local government in Romania; an introduction to the USAID-sponsored Local Government Assistance Program carried out by the International City/County Management Association (ICMA); a contact name at the Federation of Municipalities of Romania, Ms. Ileana Pascal; a contact name at USAID for Public Administration projects, Mr. Scott Johnson; a contact, Mr. Bogdan Popovich, at a Real Estate Association interested in receiving training for their staff on all aspects of real estate; and the names and phone numbers of several city mayors, including the mayor of Sector One in Bucharest. We received copies of several International Municipal Information Series Reports, and a copy of Law 69, the Law of Public Administration.
- **Meeting with the Federation of Municipalities:** Yvonne Rudman and I met with Ileana Pascal, the director of the Federation of Municipalities of Romania. Our purpose was to collect information about the activities of the Federation and to find ways that the CBE network could be of value to them. The Federation is in the process of finding new office space and once moved, plan on linking their office to an Internet provider. Once they are able to access the Internet, Ileana is interested in a seminar about gathering information and research on the Internet. I will contact Ileana toward the middle of September for a follow up on their progress on getting access. Other topics of interest are ways to build private

**Romania Project Activity**  
**S. Alexander for July 1995**

- and public linkages, and to gather any available information on other city governments associations. Yvonne will collect information on U.S. associations for Ileana upon her return to the States.
- **Meeting with Scott Johnson at USAID:** Yvonne Rudman and I met with Scott Johnson to learn about the public administration component of USAID in Romania. The goals were to gather information on how best to integrate public administration and economic development, and to establish/maintain ongoing communication between our two offices to learn about opportunities for the integration of these two areas.
  - **Meeting with the Timisoara Chamber of Commerce:** I met with Adriana Palcau, the Counselor in the Business Development Department at the Chamber of Commerce responsible for Educational Programs. The Chamber would like the Timisoara Romanian/American Center to develop educational seminars on Tourism that could be offered through the Chamber.
  - **Meeting with CRIMM in Craiova:** The Romanian/American Center in Craiova arranged a meeting for the Craiova and American teams, led by Dr. Robert Tolar and Professor Florin Radu, at the CRIMM offices in Craiova. We met with local CRIMM leaders and the PHARE project leader, Dr. Ralf Rossing, and toured their facilities. I re-established two contacts made at the National Conference for SMEs: Corneliu Dinca and Dragos Cotarcea. Our common goal is increased cooperation between the national network of SME centers.
  - **Toured Craiova-based Business:** The American team toured local Craiova company AS International with the marketing manager, Carmen Covrig. The visit was arranged by the Craiova Center. Ms. Covrig had previously come to the United States on a PIET grant and had been counseled by the Office for International Programs in Vancouver. This visit received press coverage by UNISAT Cable Television company.
  - **Meeting with ARD:** Yvonne Rudman and I met with Angela Balan and Calin Siriteanu at ARD. The purpose of the meeting was to recap the conference and to stress our willingness to promote network cooperation and open lines of communication.

### IMMEDIATE IMPACT

*Definition: The program results in immediate changes for the better within the country--e.g., it puts "food on the table" if it is an agricultural program, or it increases profits, broadens markets, etc. if it is a management training program.*

- **Presentation on Tourism in Timisoara:** I gave an hour presentation to the members of the Timisoara Chamber of Commerce interested in promoting tourism in the Banat region. There were 30 attendees, as well as a representative from the Ministry of Tourism, Ms. Maria Salceanu. At the specific request from the Chamber representative, Menula Iovescu, my presentation focused on my experience as a tourism professional and hands-on evaluation methods of tourism opportunities that I had used in my work. The seminar was covered in the media by at least two newspapers and one television station. Two businesses have requested one-on-one follow up counseling to talk more about evaluation strategies. One business has presented me with a tourism proposal for a type of "farm tourism" in the Banat region.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY - AUGUST 1995  
PREPARED BY BRETT ROGERS - WSU CHIEF OF PARTY**

**OVERVIEW:**

August was highlighted by the first annual CBE Network Planning Conference held in Sinaia on August 10-13. For the first time nearly all the counselors, directors and support personnel from our four centers were brought together. Key outcomes of the Conference include the establishment of several standing committees, including ones for Directors, Center Development, Research, Training, and Human Resource Development. The Professional Business Counselor certification process was reviewed, reworked and improved. The Centers began an on-going process of SWOT analysis to stay on top of strengths, weaknesses, opportunities and threats as they relate to center goals. The establishment of personal linkages between the people at the various Centers holds the greatest promise for fully achieving our project goals. By knowing, working with and respecting the abilities of their counterparts, all members of the CBE Network become aware of the entire range of resources available to accomplish objectives.

The on-going quest for self-sustainability gained momentum in August through the efforts of Yvonne Rudman, Jim Marten, Constantin Dumitru and Cezar Scarlat. A contract to provide training services to an outside agency was signed. While relatively small in monetary value, the contract is huge in significance. Having others confirm that the services offered by the CBE have value and are in demand is a tremendous confidence builder. Other training contracts are in various stages of negotiation and some will undoubtedly come to fruition.

Shannon Alexander, on board for less than three months, is a driving force in many of the Center accomplishments. She played a tremendous role in organizing the Planning Conference, has instituted a new office filing system, and has established a program to train staff in basic office management principles. These activities have been done in addition to her on-going duties as a Business Development Specialist.

My perception is that steady progress is being made toward the realization of all of our project goals. Morale is generally good for both the American and Romanian team members. Our Internet connection and Local Area Network are usually operational. The processing of invoices and other paperwork on campus in Pullman is proceeding smoothly and in a timely manner. The Conference left us all with a sense that we are part of a larger team. Building on these strengths will be our continued mandate.

**INSTITUTION BUILDING:**

- Oversaw Network Planning Conference in Sinaia. Conducted meetings with Center Directors and Administrators. Reviewed 1996 Work Plan goals.
- Made final preparation for counselors Marian Mocan and Doru Mavrodin to participate in PIET training in the States.
- Met with other USAID contractors at monthly meeting of Economic Restructuring Group. Discussed with Obie Moore methods for working together with the Romanian-American Enterprise Fund.
- Introduced Dr. Mihai Stoica to research librarians at the American Cultural Center's Business Resource Center preparatory to his pursuing research duties at the Center.

- Met with RDA officials to continue development of positive working relationship. Agreed to assist in preparing responses to a UNDP questionnaire.
- Assisted Black Sea University in developing a recruiting strategy for 1996 Summer Offerings.
- Met with Director of the UNDP Center in Brasov to explore possible areas of cooperation.

**SUSTAINABILITY:**

- Continued to review opportunities for generating funds through consulting projects and training programs. Contract signed with ACDI to provide a training program in late September.
- Explored opportunities to generate income through publishing of business books, articles and texts. New synergy between counselors at different centers holds some promise for joint authorship.
- Continued to push for a uniform schedule of basic fees at each center. Urged directors to determine methodology for gaining requisite permission from the respective institutions.

**IMMEDIATE IMPACT:**

- A contract for three quarters of a million lei to deliver training services marks a first in Center history. Beside the flow of funds, the contract confirms that CBE services have value in a larger community.

**HIGHLIGHTS:****Completed:**

- Local Area Network at Center for Business Excellence is completed.
- Planning Conference held August 10-13 in Sinaia.
- New office filing system and procedures instituted at CBE.

**Planned:**

- Submit funding proposal to FIMAN.
- Continue preparation of work plan for 1996.
- Extend E-mail service to our centers at ASE, Craiova and Timisoara.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT REPORT: AUGUST 1995**  
**BY: SHANNON ALEXANDER**

**HIGHLIGHTS**

**Completed:**

- Completed all preparatory work on the logistics for the Center for Business Excellence Network's 1995 Planning Conference.
- Attended the first annual Planning Conference for the CBE Network in Sinaia on August 10th - 13th. Met goal of strengthening network communications by developing idea of committee work and by bringing together the network's first committee—one to work on planning next year's conference.
- Met with Timisoara director to discuss counseling opportunities on tourism, in cooperation with the Chamber of Commerce.
- Completed questionnaire to be used in gathering information for the development of the CBE Network Membership Directory. The questionnaire has been approved by the four center directors.
- Contacted people in outside organizations for information on tourism and human resources by using e-mail.

**Planned:**

- Finalize Standing Committees by assigning membership based on questionnaire responses, developing written committee procedures, and arranging for first round of committee meetings in October.
- Meet with Conference Committee to review feedback gathered in questionnaire about the 1995 conference. Gather proposals from hotels/conference planners on options for 1996 meeting.
- Distribute questionnaire to gather counselor profile information for membership directory. Begin to collate information and design directory.
- Meet with librarian at American Cultural Center and introduce CBE library coordinator to her and to their new business library resources.
- Continue to strengthen office procedures for all centers in the network.
- Begin to plan itinerary for visit from Washington State University's Assistant Dean for Student Services.
- Work with Timisoara on developing tourism counseling expertise.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT ACTIVITY AUGUST 1995**  
**BY: SHANNON ALEXANDER**

**INSTITUTION BUILDING:**

*Definition: Helping develop capacity within institutions to better address needs in the transition economy and the free market economy to come. This may include faculty and administrator training, developing new programs (e.g., MBA, human resource management, continuing education, etc.)*

- **1995 Planning Conference:** Participated in the first annual Planning Conference held for and by the members of the Center for Business Excellence Network. Members of the four centers came together in Sinala to strengthen the network through improved communication systems; to re-evaluate and harmonize counselor training standards among the centers; to discuss the network's strengths, weaknesses, opportunities and threats; and to create awareness of how increased cooperation between the centers can, in turn, increase center resources.
- **Standing Committees:** Developed idea of committees to improve cooperation and teamwork within CBE Network. Currently recruiting members for five different committees to facilitate planning joint projects and to meet common goals. Standing Committees under development are: Directors Committee, Center Development Committee, Research Committee, Human Resources/Career Services Center Committee, Training Committee and the Conference Committee.
- **Conference Committee:** Established the Conference Committee and held its first meeting at the end of the 1995 Planning Conference to discuss dates and locations for the 1996 Conference. Circulated a questionnaire to all conference participants asking for feedback on the conference logistics (location, timing, lodging, meals, meeting facilities, other facilities, general scheduling of activities). All feedback will be evaluated by the committee and used to plan an even better conference in '96.
- **Network Membership Directory:** Designed questionnaire to gather relevant information on each CBE counselor and bring it together in the form of a membership directory. Gathered input on relevancy of information from center directors and incorporated it into final version of questionnaire to be sent out to network members.
- **Library Resources:** Met with counselor in charge of PUB library to evaluate periodicals currently receiving, needing to be renewed, or needing to be canceled. Arranging an introduction for counselor and office administrator to head librarian at American Cultural Center (who is currently developing a business library at the center). Goal is to avoid duplicating resources, and to streamline the search for information .
- **PR Meeting:** Met with PUB counselor in charge of public relations and promotional materials to develop ideas on new CBE logo. Preliminary designs were available at the Planning Conference and are currently undergoing revision.

**Romania Project Activity Report  
S. Alexander for August 1995**

- **Office re-organization:** Working closely with office administration/secretary at PUB center to re-organize the office more efficiently. Developed new filing system for general office files. Established system of regularly updating information on display for clients (bulletin board postings, magazines and journals, notebooks containing credit information). Facilitated information flow by creating in-boxes for each team member.
- **Meeting with Anca Dragoi, Timisoara Center Director:** Met to discuss tourism training opportunities through the Timisoara Chamber of Commerce. The Chamber is in need of very specific coursework on licensing rules and regulations, but there is an opportunity to provide business counseling for tourism companies through our center.
- **Meeting with Chris Okerch, Peace Corps Volunteer:** Organized on-site visit for new PUB Peace Corps Volunteer. Introduced him to his Romanian contact and provided him with information on the Center for Business Excellence Network.
- **Meeting with Teresa Ghandi, Peace Corps Volunteer:** Participated in meeting with new Timisoara Peace Corps Volunteer. Provided follow-up information to her site visit at the Timisoara center and answered questions about the structure and goals of the CBE Network.
- **Contacted tourism organization:** Contacted The Society of Travel and Tourism Educators via e-mail for general information on tourism.
- **Contacted Human Resources Management professor:** Contacted Professor Rick Mowday via e-mail for periodical information on human resources management issues.

**SUSTAINABILITY:**

*Definition: The capacity of the host country to carry on a program after USAID funding and US trainers are gone. This is a philosophical commitment to the program as well as a willingness to commit financial and human resources necessary to perpetuate it.*

- **Meeting with Carmen Vlaicu, International Center for Entrepreneurial Studies:** Met with Ms. Vlaicu and Yvonne Rudman to exchange information about our centers. Ms. Vlaicu's center is sponsored by the U.S. Chamber of Commerce and currently has a contract with CIPE out of Washington, D.C. to develop business associations in Romania. She is also active in the Science Technology Society Center located in the University of Bucharest's Department of Sociology. She is a Soros grant recipient for a study on technology transfer as a globalization process, which she is conducting through this center.
- **Meeting with Ian R. Lee, Carleton University:** Met with Ian Lee, a professor at Carleton University who is interested in developing case studies on business in Romania. He is a professor who will be teaching in Romania Spring '96. Professor Lee provided an introduction to Mr. G. Badescu of CMF Consulting who is involved with the valuation of privatizing companies. Mr. Badescu extended an invitation to tour and use his association's business library.

**Romania Project Activity Report  
S. Alexander for August 1995**

**IMMEDIATE IMPACT**

*Definition: The program results in immediate changes for the better within the country-- e.g., it puts "food on the table" if it is an agricultural program, or it increases profits, broadens markets, etc. if it is a management training program.*

- **Co-counseled on tourism at ASE:** Co-counseled Diana Zotescu, Adrian Zaharescu's client, who is interested in starting a travel service company. She has registered her company, but has not actively started planning her business. Counseled her on the development of a business plan and the idea of marketing to those clients she has already serviced in previous tourism ventures. She was interested in a foreigner's outlook on tourism within Romania, and specifically, hearing from others with tourism industry experience.



**SBDC International Programs, WSU Vancouver**  
**Romanian Project Activity, August 1995**  
**By: Yvonne Rudman**

**Institution Building:**

American Staff Meeting

Logistics and content of the Romanian/American Center Network conference in Sinaia were discussed. Locations, rooms, menu and logistical details were refined.

The agenda was discussed at length in order to optimize results of the conference. On Friday afternoon I will facilitate a session during which each Center will make a presentation introducing themselves to the rest of the group. In addition to a broad center presentation, each Center will be required to present a S.W.O.T. analysis of their center. The S.W.O.T. analysis will present strengths, weaknesses, opportunities and threats with an emphasis on how each of these factors affects sustainability.

Sinaia Conference for Romanian/American Centers, August 10-August 13

Directors and counselors from the Timisoara, Craiova and two Bucharest Centers met in Sinaia for the first annual conference of the Romanian/American network. The conference was instrumental in:

- 1-Strengthening communications among the centers for both counselors and directors.
- 2-Establishing criteria and curriculum for counselor training.
- 3-Creating mechanisms to improve network performance through (a)committees for Research, Center Development, Training, Human resource development, Directors and Conference Planning; (b)periodic s.w.o.t. analysis review for each center; and (c)regular director and center conferences.

**Sustainability:**

Mr. Paul Radu Popovat, Mayor, Sector 2, Cezar, Yvonne

In order to develop a relationship with local government, Cezar and I met with the mayor of Sector 2. Sector 2 has no economic development department but it is peripherally involved in modernizing the outdoor markets to make them more sanitary and pleasant to use in the extreme weather conditions of summer and winter.

The market development projects are being coordinated by the Municipal government of Bucharest. They select the markets to be developed and send the projects out for bid to private developers. The sectors give the land to the private companies who in turn develop the site. After the site has been improved the sector either retains a portion of the revenue generated by the improved site or takes possession of a portion of the improved site.

EBRD loaned the city 500,000 ECU for Bucharest's infrastructure improvement, part of which is being used for enclosed market development.

Four markets have been targeted for development in Bucharest: two in Sector 1; one in sector 5; and one in sector 2. The Obor market contract was won by Proiect, a Romanian private development company. The contract runs for twenty five years and just began this year.

### Sector 2, con't

In addition to the improvement of old, outside markets, a new market will be developed in Sector 2. The government will release land for this project and a private company will build the structure.

Although the market is located in sector 2, the Mayor has little involvement in the project. The Municipal government controls the financing and decision making process. This is also true in other areas of sector government. The sector government has little interaction with business associations, universities, or citizen groups because the sector government is perceived as powerless to respond to their needs.

Mayor Popovat is a member of the Federation of Municipalities which is lobbying for mayor and city autonomy. Mr. Popovat stated however, that autonomy needs to be carefully balanced with the benefits of being associated with the central government which currently controls all fiscal spending. Autonomy must be concomitant with the ability to tax.

Mr. Popovat suggested that we contact the General Director of Economics, Mr. Teodorescu (615.1266), and the General Director of International relations, Mr. Cristescu (615.5540) at the Municipal government to get a more detailed description of the market projects and other economic development plans for Bucharest.

### Science Technology Society Centre, University of Bucharest, Carmen Vlaicu

Carmen Vlaicu works with two organizations: Science Technology Society and the International Center for Entrepreneurial Studies. They are both affiliated with the University of Bucharest. Through ICES she has conducted seminars at fifty sites throughout Romania on the profile of an entrepreneur. She has also presented papers at an Austrian conference on cultural comparisons of entrepreneurs and feminist studies about entrepreneurship.

Recently, she obtained a grant from the SOROS Foundation about technology transfer as a globalization process. She will conduct a longitudinal analysis of six organizations to study worker and manager acceptance of new technologies, i.e. management techniques. Three companies will be state-owned and three will be private enterprises.

She has established working relationships with chambers and business associations throughout Romania and is interested in collaborating with CBE to conduct workshops within this network.

### USAID Public Administration, Scott Johnson

A contract has not yet been signed between USAID and the contractor who will be designing public administration/economic development programs in six Romanian cities. At this time Mr. Johnson is selecting cities which will be the sites for contractor projects.

We discussed Timisoara as a possible site for development since CBE is firmly established there with a strong counseling team and has a strong relationship with the Chamber of Commerce.

A needs assessment at each chosen site will determine the focus of the project.

Promotional materials, Shannon, Mihaela Minulescu, Yvonne

Six designs were completed by the graphic artist and were presented to the directors and counselors at the Sinaia conference. There was discussion about the network name, appropriate logo and color scheme.

When the final design is decided upon, a bidding process will be instituted to choose a printer for this project and to model and reiterate how such a process operates in the procurement of such goods and services.

AISEC

Continued attempted communications with AISEC. They sent the program for the European Congress to be held in Bucharest August 18-25. However, we have not received any responses to our faxes expressing interest in attending the conference.

Immediate Impact:

The contract with ACDI was signed. The business seminar will be coordinated by Jim Marten and conducted by Mihaela Minulescu and Florin Danalache. It is scheduled for late September and early October. There is a possibility of repeating the seminar in February.

In my latest conversation with ACDI, I learned that their funding level may interfere with how they have conducted seminars in the past. In the future they may rely more on local expertise which is an opportunity for the CBE to conduct more collaborative seminars with ACDI.

HighlightsCompleted:

ACDI training contract signed  
S.W.O.T. analysis of centers conducted in Sinaia

Planned:

Tentative plans for return in January 1996  
Seminar in public/private linkages at request of Federation of Municipalities  
Meyers-Briggs personality workshop in conjunction with human resources or entrepreneurial seminar  
Continued communications with Scott Johnson, USAID about collaboration in public administration/economic development programs

**TO: Bob Tolar, Director, WSU/SBDC International Programs**  
**FROM: Jim Marten, Director of Training**  
**DATE: September 8, 1995**  
**RE: Activity Report for August, 1995**

**SERVICES PROVIDED SUMMARY FOR JIM MARTEN (CONTACT HOURS)**

	Training		Consultation	
	Male	Female	Male	Female
Counselors/ Faculty	0.0	0.0	54.0	26.5
Students	0.0	0.0	1.5	0.0
Government Officials	0.0	0.0	2.5	1.0
Business Community	0.0	0.0	0.0	0.0
Journalists/Media	0.0	0.0	0.0	0.0

**OVERALL PROJECT IMPLEMENTATION REPORT**

<u>Counselor Training</u>	Male	Female	Total
Professional Business Counselor Certifications	0	0	0
Master Business Counselor Certifications	0	0	0
<u>Total Center System Business Manager Training</u>			
Seminar attendance by business managers	0	0	0
Seminar attendance by students	0	0	0
Seminar attendance by government officials	0	0	0
Seminar attendance by others	0	0	0
<u>Management Training Program Only</u>			
State-owned enterprises participating	0		
Consultations with management teams	0		
Seminar attendance by managers of state enterprises	0		

**INDIVIDUAL HIGHLIGHTS**

**Completed:**

- ^ 1995 Management Training Program:
- Finalized planning for fall 1995 Program including staffing, timetable, and course content
- Recruited Center staff for positions on counseling, training, evaluation and selection teams

- Concluded negotiations with Private Ownership Fund and Romanian-American Enterprise fund to act as nominating agencies for program participants
- Developed tentative timeline for MTP2 Follow On Training which will continue work with selected companies from Spring 1995 MTP
- \* **Counselor Training**
- Facilitated complete revision and approval of Professional Business Counselor certification program at the Network Conference in Sinaia, August 11-12.
- Organized inter-center curriculum development teams to develop new training material for counselor training
- \* **Other Activities:**
- Assisted in the organization and facilitation of 1995 Network Planning conference
- Worked with potential Peace Corps Business volunteers in orientation to WSU Network activities

#### **Planned:**

- \* **1995 Management Training Program**
- Complete training and orientation of Romanian team members who will be managing and implementing a majority of the Program
- Hold informational meeting with Program nominees and select top five for participation
- Finalize schedule, budget and attendant logistics for fall Program
- Organize objectives, timeline and budget for MTP2 follow-on training in conjunction with WSU MBA and other staff.
- \* **Counselor Training**
- Finalize revisions to PBC certification training material and examinations
- Set strategy for certification of remaining MBC trainees
- Set schedule and curriculum for next MBC training class
- \* **Other**
- Continue prospecting and proposal development for external "fee for service" contracts
- Begin working with PUB students for third party evaluation of Center effectiveness
- Develop directory of available training programs already developed and available within the Network.

#### **Institution Building:**

- \* Assisted in the design, organization, and facilitation of the 1995 WSU SBDC Romania Network Planning Conference

#### **Sustainability:**

- \* Finalized negotiations for an external training contract with outside organization. This agreement will provide direct funds for Center as well as develop staff skills in sustainability areas.

Month AUGUST Year 1995  
 To be completed by Center Directors

Center for Business Excellence  
 Ubrae Scarlet

**INQUIRIES**  
 Walk-Ins 15  
 Telephone 50  
 Other -  
**TOTAL INQUIRIES** 65 (estimation)

**CLIENTS COUNSELED**

Male 29  
 Female 4  
**TOTAL CLIENTS** 33  
 Business 33  
 Government -  
 Student -  
 NGO -  
**TOTAL CLIENTS** 33  
**TOTAL CLIENT SESSIONS** 55 ~ 103 counseling hrs.

**SEMINAR ATTENDEES**

Male -  
 Female -  
**TOTAL ATTENDEES** -  
 Business -  
 Government -  
 Student -  
 NGO -  
**TOTAL ATTENDEES** -  
**TOTAL SEMINARS** -  
**SEMINAR CONTACT HOURS** -

**TRAINING ATTENDEES**

Male -  
 Female -  
**TOTAL ATTENDEES** -  
**TOTAL TRAINING SESSIONS** -  
**TRAINING CONTACT HOURS** -

CRAIOVA CENTER

Month Aug. Year 1995  
 To be completed by Center Directors

**INQUIRIES**

Walk-ins	<u>12</u>
Telephone	<u>3</u>
Other	<u>-</u>
<b>TOTAL INQUIRIES</b>	<u>15</u>

**CLIENTS COUNSELED**

Male	<u>10</u>
Female	<u>5</u>
<b>TOTAL CLIENTS</b>	<u>15</u>
Business	<u>13</u>
Government	<u>-</u>
Student	<u>2</u>
NGO	<u>-</u>
<b>TOTAL CLIENTS</b>	<u>15</u>
<b>TOTAL CLIENT SESSIONS</b>	<u>18</u>

**SEMINAR ATTENDEES**

Male	<u>-</u>
Female	<u>-</u>
<b>TOTAL ATTENDEES</b>	<u>-</u>
Business	<u>-</u>
Government	<u>-</u>
Student	<u>-</u>
NGO	<u>-</u>
<b>TOTAL ATTENDEES</b>	<u>-</u>
<b>TOTAL SEMINARS</b>	<u>-</u>
<b>SEMINAR CONTACT HOURS</b>	<u>-</u>

**TRAINING ATTENDEES**

Male	<u>-</u>
Female	<u>-</u>
<b>TOTAL ATTENDEES</b>	<u>-</u>
<b>TOTAL TRAINING SESSIONS</b>	<u>-</u>
<b>TRAINING CONTACT HOURS</b>	<u>-</u>

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER  
ROMANIAN PROJECT ACTIVITY - SEPTEMBER 1995  
PREPARED BY BRETT ROGERS - WSU CHIEF OF PARTY**

**OVERVIEW:**

While September had no one central event such as August's Network Conference it was nonetheless marked with accomplishments. Two of the counselors from the Tismisoara Center completed the book which they had co-authored and turned it over to the publisher. Entitled "The Management of Production Businesses-- A Guide to Planning", the book will be distributed throughout Romania. Several rich opportunities to promote the book and the CBE Network have been arranged following publication some time in October. Credit to WSU and USAID for their financial support is given in the front of the book.

Planning for the autumn round of the Management Training for Privatization Program was completed. A two tier approach, using intensive follow-on training for selected participants from the Spring program and the standard curriculum for first time participants was decided upon. Final selection of all participants will be completed in early October.

Promotional efforts to increase visibility of the Centers within their respective communities continued. Work was begun on a network membership directory featuring profiles of Center staff members. Articles have been and are continuing to be written for the CBE Newsletter which is expected to be published in October and quarterly thereafter. Work on an informative home page for our World Wide Web/Internet address is nearing completion.

Office procedures and organization for each of the Centers are being evaluated and improved. Client enrollment forms are being updated for ease of use in a new database being developed by Mr. Eric Keerbs, one of the WSU interns available to us this autumn. Regular staff meetings at the Politechnica Center have resumed following a several month hiatus.

The WSU project underwent a review conducted by USAID as part of its new Monitoring and Reporting System. Agreement was reached on revised reporting requirements that will better document the impact of program activities.

Self-sustainability at the CBE moved forward another couple of steps as two additional training contracts were signed. The value of the new contracts that will be completed in October is well over \$14,000.

**INSTITUTION BUILDING:**

- Met twice with UPB Vice-rector Berbente to clarify staffing issues and discuss plans for the Human Resource Center.
- Furnished background information on the WSU project to RDA. Participated in completing a questionnaire for the UNDP.
- Met with other USAID contractors at quarterly all-sector meeting. Provided quarterly update on WSU project activities.
- Made presentation about the WSU project to a group of visiting Danish educators and business people.
- Traveled to Timisoara Center to clarify invoice voucher procedures and matching report requirements with Director Anca Dragoi. Also discussed modifications



- needed to the New Client enrollment form. Met with director of business incubator. Met with International projects director for Land O'Lakes.
- Traveled to Craiova to review client enrollment process and meet with counselors.
  - Attended monthly staff meeting at ASE Center. Gathered information for 1996 Work Plan.
  - Met with representatives from two organizations in Arad to explore possible counselor training program for a proposed center in that city.
  - Provided training in use of international trade resources in the CBE library to Peace Corps Volunteers from Constanta.

**SUSTAINABILITY:**

- Contracts signed with FIMAN/PAEM and RODAE Automobile S.A. Craiova to provide training. Value of contracts exceeds \$14,000.
- Developed timetable for having written self-sufficiency plans at each Center. The deadline for completion of plans is April 30, 1996.
- Continued to push for a uniform schedule of basic fees at each center. Continued to urge directors to determine methodology for gaining requisite permission from the respective institutions.

**IMMEDIATE IMPACT:**

- Two contracts for over \$14,000 to deliver training services continues upward progress in Center development. The flow of new funds will permit a wider range of activities.

**HIGHLIGHTS:****Completed:**

- New reporting requirements for AID will better document impact of our services.
- Sponsorship of business book co-authored by Network counselors.
- Significant progress made toward self-sufficiency as a result of training contracts being awarded.

**Planned:**

- Pursue pilot program with Peace Corps and RDA to link 21 Centers via E-mail.
- Continue preparation of work plan for 1996.
- Complete Job Descriptions and Work Agreements in conjunction with Director Cezar Scarlat for employees at the CBE.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT REPORT: SEPTEMBER 1995**  
**BY: SHANNON ALEXANDER**

**HIGHLIGHTS**

**Completed:**

- Finalized Standing Committee membership and meeting procedures. Began to schedule first round of meetings with committee members.
- Distributed and collected majority of questionnaires for the CBE Network Membership Directory.
- Collected CBE newsletter submissions and began to edit for publication.
- Re-wrote and re-designed CBE fact sheet to use as a promotional tool.
- Met with librarian at American Cultural Center to introduce CBE library coordinator and office administrator to her and the center's new business library resources.
- Met Danish business people and helped introduce them to the CBE center's activities.
- Continued to strengthen office procedures for the centers within the CBE Network.
- Began to coordinate the development of the itinerary for October visit from WSU Assistant Dean for Student Affairs.

**Planned:**

- Attend first committee meetings for the Human Resources Committee and the Center Development Committee. Help organize membership and meeting goals according to the written procedures. Aid in the development of committee workplans to be presented to Directors Committee meeting in November.
- Finish formatting the CBE Network Membership Directory in English. Begin coordinating the translation of materials into Romanian version of directory.
- Finish editing, formatting and approval process for CBE Newsletter. Publish and mail it.
- Distribute approved version of the CBE fact sheet to counselor in charge of promotions to develop brochure and to the network administrator to develop home page. Work with these two individuals to ensure timeliness of project development and management.
- Continue planning the schedule for visit from WSU Assistant Dean for Student Affairs. Attend meetings at various centers and university campuses with the Assistant Dean to speak to counselors, university professors, university administrators and students about the importance of student services.
- Work with Timisoara center on developing tourism counseling expertise. Co-counsel at least two tourism clients already scheduled during October visit to the center.

**SBDC INTERNATIONAL PROGRAMS, WSU VANCOUVER**  
**ROMANIA PROJECT ACTIVITY SEPTEMBER 1995**  
**BY: SHANNON ALEXANDER**

**INSTITUTION BUILDING:**

*Definition: Helping develop capacity within institutions to better address needs in the transition economy and the free market economy to come. This may include faculty and administrator training, developing new programs (e.g., MBA, human resource management, continuing education, etc.)*

- **Network Membership Directory:** Developed and distributed questionnaire to collect information on CBE Network members. Finished collecting questionnaires, c.v.'s and photographs from three of the four centers. Began processing information into finalized format.
- **Standing Committees:** Assigned committee membership to each member who expressed interest in participating in a standing committee. Developed procedures/rules for the operation of and participation in standing committees. Distributed procedures and posted committee membership lists. Worked with American team to schedule first committee meetings. Scheduled first meetings for Human Resources Center Committee and Center Development Committees in October.
- **PR Meeting:** Reviewed mock-up design of new logo, business cards and letterhead with PUB center counselor charged with public relations/promotional materials. Agreed on concept and sent design back for final work up. Sample materials being produced for CBE Network approval.
- **Library Resources:** Coordinated gathering a list of needed resources with each center and outside expert sources. Sent list of American or English language publications to be ordered through WSU coordinating office for each center in network. Worked with PUB library coordinator to develop list and order Romanian language publications.
- **Office Organization:** Met with full-time PUB center employees to develop list of opening and closing, new client, and computer use procedures for the center. Purpose was also to establish communication on office procedures between these three individuals.
- **Staff Meeting:** Attended staff meeting at ASE center and met three new counselors in training. I also met new Peace Corps Volunteer, Rick Frisch.
- **Timisoara Visit:** Worked closely with office administrator to re-organize Timisoara office during September visit. Changed one private office into an additional counseling room because of need for space. Organized library into an "information center" to encourage counselors and clients to spend more time working there. Developed good working relationship with new Peace Corps Volunteer, Tereasa Gandhi.

**Romania Project Activity  
September 1995  
Alexander**

### **SUSTAINABILITY:**

*Definition: The capacity of the host country to carry on a program after USAID funding and US trainers are gone. This is a philosophical commitment to the program as well as a willingness to commit financial and human resources necessary to perpetuate it.*

- **Meeting with Lili Stoian, American Cultural Center:** Scheduled meeting to introduce PUB center's office administrator and PUB counselor in charge of center's library resources to Lili Stoian at the American Cultural Center. Toured library facilities and compared resources to avoid duplication of materials.
- **Hosted Danish Business Visitors:** Participated in hosting a group of Danish visitors organized through Institutul Roman de Management. Presented Human Resources activities of the center and helped keep meeting flowing on schedule. Conceived idea of using this visit as a public relations tool and issuing a press release to invite local media to the meeting.
- **CBE Newsletter:** Developing and organizing first issue of the CBE newsletter. Purpose is to promote individual center activities to other member centers and to promote network activities to outside organizations. Requested and gathered submissions by Romanian team members. Began editing submissions for final formatting in October.
- **Promotional Fact Sheet:** Re-wrote CBE fact sheet in English to use as a promotional tool. This fact sheet will serve as a handout for center visitors, the basis for a promotional brochure, and as the information to be posted on the CBE home page on the Internet. New version is undergoing approval process and will be finalized in the second week of October. Next step will be to organize same style of fact sheet at each of the other three centers.

### **IMMEDIATE IMPACT**

*Definition: The program results in immediate changes for the better within the country-- e.g., it puts "food on the table" if it is an agricultural program, or it increases profits, broadens markets, etc. if it is a management training program.*

- **Met with Dan Holotescu, Business Owner:** Mr. Holotescu and I met to discuss the prospect of promoting "agricultural tourism" within a zone currently without many touristic resources. We were introduced during my July presentation on tourism, and he dropped by the Timisoara center to renew the acquaintance. We have scheduled a counseling session with a Romanian counselor during my October visit to delve into specifics on the zone. He wants to persuade the Mayor's office on the benefits of tourism development within the zone, so that they will help to develop the needed infrastructure.

**TO:** Bob Tolar, Director, WSU/SBDC International Programs

**FROM:** Jim Marten, Director of Training

**DATE:** October 9, 1995

**RE:** Activity Report for September, 1995

**SERVICES PROVIDED SUMMARY FOR JIM MARTEN (CONTACT HOURS)**

	Training		Consultation	
	Male	Female	Male	Fem:
Counselors/ Faculty	36.0	18.0	14.0	12.0
Students	0.0	0.0	1.0	0.0
Government Officials	0.0	0.0	0.0	0.0
Business Community	0.0	0.0	12.0	0.0
Journalists/Media	0.0	0.0	0.0	0.0
Other Groups	0.0	0.0	9.0	13.0

**OVERALL PROJECT IMPLEMENTATION REPORT**

<u>Counselor Training</u>	Male	Female	Total
Professional Business Counselor Certifications	0	0	0
Master Business Counselor Certifications	0	0	0
<b><u>Total Center System Business Manager Training</u></b>			
Seminar attendance by business managers	0	0	0
Seminar attendance by students	0	0	0
Seminar attendance by government officials	0	0	0
Seminar attendance by others	0	0	0
<b><u>Management Training Program Only</u></b>			
State-owned enterprises participating	0		
Consultations with management teams	0		
Seminar attendance by managers of state enterprises	0		

**INDIVIDUAL HIGHLIGHTS**

**Completed:**

- \* 1995 Management Training Program:
- Completed pre-program training and orientation of all Romanian team members who will be managing and implementing the selection, training, consulting, and evaluation of the Program

- Held informational meeting with Program nominees in the Bucharest area and solicited applications for admission into the Program
- Finalized schedule, staffing, budgeting and attendant logistics for fall Program
- Organized focus, timeline, budget, and overall strategy for MTP2 follow-on consulting in conjunction with WSU Master Intern and other in country staff.
- Redesigned and implemented streamlined agreement for compensation and work outputs for Romanian team participation
- \* **Counselor Training**
- Finalized revisions of PBC certification Training Skills Assessment Test (TSAT) in conjunction with Network curriculum revision team
- Redesigned PBC certification training record system
- Set up framework of revised MBC training program
- \* **Other Activities:**
- Began working with a PUB graduate for third party evaluation of Center effectiveness
- Completed delivery a fee for service contract training program for ACDI as part of their technical training for the baking industry
- Assisted in the orientation of new Peace Corps Volunteers who are now working in the Network

**Planned:**

- \* **1995 Management Training Program**
- Complete selection of participants for Level One of MTP in Bucharest
- Complete evaluation strategy and system for both Level One and Level Two of MTP in conjunction with Network evaluation team
- Organize and deliver first three sessions of Level One training
- Complete company analysis and project identification for Level Two in Brasov and Timisoara areas
- Set schedule and strategy for mid-cycle evaluation of both Level One and Level Two MTP
- \* **Counselor Training**
- Solicit MBC trainee nominees from all Network Directors
- Organize trainers and develop curriculum for the next MBC training class
- Distribute new PBC training record, test and system to all centers
- \* **Other**
- Develop directory of available training programs already developed and available within the Network.
- Organize Network Training Committee meeting, elect officers, and set workplan for future activities.

**Institution Building:**

- \* Expanded relationships with other development agencies through potential partnering agreements for the Management Training Program

**Sustainability:**

- \* As part of completion of an external fee for service contract, developed internal procedures for contract negotiation, development, processing and consultant compensation.