

An Investigation of Strategic Planning and Organizational Change

Halton Regional Police Service

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Abstract

The Halton Regional Police Service completed a Strategic Planning process in 1991 and repeated the process in 1995. The success of these exercises will be discussed and critiqued in terms of effectiveness, particularly in terms of utilizing methods to counteract staff resistance to change. This paper will isolate the issue of resistance to change as a challenge to the success of Strategic Planning processes. The paper will also present conclusions from the analysis.

The paper will define Strategic Planning and isolate one particular method; the Harvard Policy Model, as the process utilized by Halton Regional Police Service. Further, the paper will discuss the study of organizational development (OD) and identify techniques used to counteract resistance to change.

The analysis of Halton's two strategic planning exercises will serve to demonstrate that resistance to change by employees should be a consideration within the process. Practical applications of techniques offered in the study of OD to counteract change resistance will also be highlighted.

Acknowledgements

The writer participated in both Strategic Planning processes completed by Halton Regional Police Service and consequently some information within this paper culminates through personal knowledge and experience. The writer also wishes to acknowledge the assistance and contributions of *Inspector Dan Okuloski, S/Sgt. Bill Ford, S/Sgt. Joe Barker and Mr. Keith Moore*. These members of the Service played integral parts in the Strategic Planning processes and were particularly helpful in the analytical development of the paper through personal comments provided in interviews and research documents.

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Municipal as well as corporate organizations can find many catalysts for change. There can be no doubt that organizations exist in constantly developing, evolving and adapting environments. Some changes are thrust upon them from external sources such as legislatively mandated requirements, and some changes are brought about by internally organized activities. Certainly one of the highly popular and widely studied catalysts for organizational change is commonly referred to as "strategic planning."

Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why it does it.¹

Similarly, many sociologists are students of organizational behaviour, and in particular, organizational development (hereinafter referred to as "OD"). This realm of organizational study focuses on two specific ends; (1) improvement in an organization's effectiveness and (2) improvement in the satisfaction of its members. OD uses a systems-oriented approach to change with an emphasis on humanistic-democratic values. This is coupled with the belief that facilitating the integration of individual and organizational objectives will increase the organization's effectiveness.² The study of "OD" recognizes that endeavours that lead to changes

¹John M. Bryson, Strategic Planning for Public and Nonprofit Organizations. A Guide to Strengthening and Sustaining Organizational Achievement (San Francisco: Jossey-Bass Inc., 1988), p. 5.

²Stephen P. Robbins. ed., Essentials of Organizational Behaviour, 2nd ed. (New Jersey: Prentice Hall, 1988), p. 224.

in the status quo will often meet with resistance. People are naturally reluctant to accept things that differ from the known; the familiar and the "tried and true." OD provides opportunities to equalize or overcome the resistance and reduce the struggle against change.

What is of particular interest is that there has not been a marked merging of philosophies with respect to strategic planning and organizational development.

Purpose and Methodology

It will be the purpose of this paper to present two case studies of strategic planning and relate the findings to the issue of resistance to change. It will be necessary to identify the general concepts of strategic planning and outline the steps or processes commonly followed during a strategic planning exercise. Further, the paper will discuss the study of OD; particularly the issue of resistance to change and techniques utilized to counteract the phenomenon.

The two case studies will involve the same organization; Halton Regional Police Service. Strategic planning processes were completed by Halton Regional Police Service during 1991 and again in 1995. The paper will review and critique the processes in each case by isolating the following issues:

- a) What strategic planning process was utilized and how effective was the process in terms of achieving identified goals;
- b) What specific methods were used during the strategic planning processes that counteracted resistance to change and what level of success was achieved; and
- c) What conclusions and recommendations can be made from these findings.

There will be an opportunity to contrast various features of the two processes through comparative analysis. Fundamental differences in the strategic planning processes will be discussed and compared. The three specific aspects of the processes that will be discussed are:

- a) Process;
- b) Implementation; and
- c) Leadership.

Finally, the paper will suggest that the working philosophy of strategic planning would be better served by fully recognizing and anticipating employee resistance to change within the strategic planning process and plan to overcome its effects.

By utilizing a public organization to illustrate the issues, the paper will demonstrate the overlapping relationship and importance of strategic planning with the concept of overcoming resistance to change - in a local government (albeit a Police Service - a special purpose body) - particularly in the current Ontario political environment of fiscal restraint.

Strategic Planning

Before venturing further into this discussion it will be important to have a clear understanding of the concepts of strategic planning. Indeed, writings about strategic planning have produced numerous definitions and interpretations of 'strategies.' Within the many papers, books and references available on the subject of strategic planning, at least five different models of strategic planning can be delineated.³ Bryson, Freeman, and Roering suggest that the "Harvard Policy" and "Stakeholder" models are probably the most common approaches to strategic planning in the public sector.⁴ At the onset of this paper, the definition of what will be considered "strategic planning" was provided. The Harvard Policy Model will

³Bryson, John M., R. Edward Freeman, and William D. Roering, "Strategic Planning in the Public Sector: Approaches and Directions." in Barry Checkoway, Ed., Strategic Perspectives on Planning Practice (Lexington, MA: Lexington Books, 1986) p. 73.

⁴Ibid., p. 73.

best fit with the definition used here and will be identified as the model that best describes the processes utilized in the two case studies presented.

In the Harvard Policy Model, strategists assess organizational strengths and weaknesses, identify opportunities and threats, and seek to align the organization with its environment. Organizations are enjoined to build on strengths, overcome weaknesses, exploit opportunities and block threats.⁵ Stakeholders (individual and organizational actors who have an interest or stake in the focal organizational) are identified as key to the process. There is a recognition that stakeholders have the capacity to influence the organization's direction. Leadership for the process is also identified as an important element. The role of strategic leadership is to manage relationships, maximize support and minimize opposition to organizational initiatives.⁶

We can discuss strategic planning as a process that requires broad scale information gathering, an exploration of alternatives and an emphasis on the future

⁵Nutt, Paul C. and Robert W. Backoff, The Strategic Management of Public and Third Sector Organizations (San Francisco: Jossey-Bass Publishers, 1992), p. 24.

⁶Berry, Frances Stokes and Barton Wechsler, "State Agencies Experience with Strategic Planning: Findings from a National Survey" in Public Administration Review (March/April 1995 Vol. 55, No. 2), p. 160.

implications of present decisions.⁷ Strategic planning set outs priorities for an organization in order to guide its activities and use of resources into the future. It is distinguished from long range planning or comprehensive planning because strategic planning focuses on identifying and resolving issues, emphasizes external and internal environments, identifies a vision of success through qualitative shifts in direction and is likely to be action oriented.⁸

Further, popular management literature has emphasized the importance of strategic planning as a method of focusing on mission, vision and direction for all organizations. Rosabeth Moss Kanter also asserts that through strategic planning "strong leaders articulate direction and save the organization from change in 'drift.'"⁹ Kanter argues that without strong leaders, an organization will lose sight of its goals and shift or "drift" in a direction that does not support the achievement of specified and predetermined goals.

The following summarizes the elements common to many strategic planning processes and typically associated with the Harvard Policy Model:

⁷John M. Bryson, Strategic Planning for Public and Nonprofit Organizations. A Guide to Strengthening and Sustaining Organizational Achievement (San Francisco: Jossey-Bass Inc., 1988) p. 6.

⁸Ibid., p. 8.

⁹Kanter, Rosabeth Moss, The Change Masters (New York: Touchstone Books, 1983) p. 294-295.

1. Define organizational objectives and mandate - identify the goals, values and mission of the organization. Answering the question "What are we in the business of doing?";
2. Define what that process will be, the scope and agree to process guidelines;
3. Assess the external environment - identify conditions, trends, influences, threats and opportunities. Identify and consult with external stakeholders on their priorities and viewpoints;
4. Understand and assess the internal resources, capacities, strengths and weaknesses. Ensure there is an understanding of the issues facing the organization into the future;
5. Identify issues facing the organization and formulate and define a vision of the future based on the information obtained;
6. Develop strategies to manage the issues and establish goals with action programs to achieve each goal; and

7. Implement the action steps to achieve strategic goals, ensuring there is continuous monitoring, evaluation and refining.¹⁰

It is important to note that goals must be stated in terms which are specific, measurable, achievable, reasonable and tangible (the acronym "SMART" is often used to abbreviate these characteristics). Without "SMART" goals, an organization may be unable to determine if the goals have actually been achieved.

Clearly, we can conclude that strategic planning will lead to organizational change for such fundamental elements as organizational structure, operating processes, mandate and budgetary guidelines.

Organizational Change

One thing you can count on is change. Unfortunately, too many managers don't understand how it works - and have trouble coping with the "people problems" it creates.¹¹

¹⁰Note: summarized from three main sources; John M. Bryson, Strategic Planning for Public and Nonprofit Organizations (San Francisco: Jossey-Bass Publishers, 1988), The Coopers and Lybrand Consulting Group, Strategic Management. An Introduction for Municipal Managers and Councils (Toronto: Queen's Printer, 1989) and Paul C. Nutt and Robert W. Backoff, "A Strategic Management Process for Public and Third-Sector Organizations" in APA Journal (Winter, 1987).

¹¹ W. Warner Burke and others, "Managers Get a "C" in Managing Change," in Training and Development (May 1991), p. 87.

Of course, the study of "change" does not begin or end in the field of Organizational Development. It has been studied through the ages by theorists and philosophers such as Kurt Lewin (unfreezing, changing and refreezing, 1945), Thomas Kuhn (structure of scientific revolutions, 1962) and as far back as Heraclitus's famous dictum; "nothing endures but change." We will, however, limit our discussions of organizational change to the studies known as OD.

Seven hundred executives were tested by W. Warner Burke Associates to measure knowledge of 25 key issues on how to manage organizational change. Analyses of manager's scores on the instrument reveal an alarming lack of knowledge particularly in the area of managing the people side of change. The study concludes that "this is not surprising given that most managers are more comfortable dealing with organizational tasks that involve personal issues . . . (rather than) focusing attention on why employees are resisting."¹² Since the environment is characterized by constant change, such insufficient understanding of this pervasive phenomenon is cause for concern. To guide managers into the realm of strategic planning process without critical information relating to the phenomenon of change is particularly disconcerting.

Rosabeth Moss Kanter points out in the book The Challenge of Organizational Change, resistance to change is not an inevitable by-product of change efforts, nor

¹²ibid., p.90.

is it purely emotional. She states there are reasonable and predictable reasons for the resistance such as the recipients feeling a loss of control, too much uncertainty or feelings that decisions are made too quickly. Further reasons cited include a loss of face, concerns about competence, concerns about extra work, the "ripple effect," past resentments and real threats.¹³

What is particularly useful in the study of organizational resistance to change is the discussion of tangible and specific methods or techniques that can be used to overcome the resistance to change. Judith Gordon, in A Diagnostic Approach to Organizational Behaviour, offers six examples that briefly can be summarized as;

1. Encourage participation of those affected by the change during planning;
2. Let the clients experience the need for change;
3. Maintain open and frequent communications;
4. Avoid a 'we-they' mentality;
5. Consider needs of individual employees; and
6. Encourage voluntary change.¹⁴

¹³Rosabeth Moss Kanter and others, The Challenge of Organizational Change (New York: The Free Press, 1992), p. 380.

¹⁴ Judith R. Gordon, A Diagnostic Approach to Organizational Behaviour, 2nd ed. (Boston: Allyn and Bacon, Inc., 1987), p. 694.

Building on these ideas is the very foundation of organization development research. Research in OD has focused on the identification of behavioral change stimuli and techniques that will affect or alter the behaviours. Many of these techniques emphasize participation and collaboration. More specifically, members of a group or an organization are less inclined to resist a proposed change if there are particular characteristics evident within the group such as a high level of mutual trust and support, a high level of inter-communications and openness laterally, vertically and diagonally, a high level of personal enthusiasm and satisfaction, a synergistic approach to problem-solving and a high level of individual and group responsibility in planning implementation of change.¹⁵

(Organizational change) must be accomplished through methods that get the entire organization engaged and committed, both in favour of the shared vision and in a rigorous search for the truth . . . any coercive process, no matter how well intended, simply cannot ultimately result in commitment.¹⁶

Overcoming resistance to change can be a very important aspect of organizational planning in consideration of the consequences should it be ignored or not effectively countered. Steven Robbins cites some results which can be considered extreme, but will illustrate the point. Employees can sabotage change efforts,

¹⁵Stephen P. Robbins, Essentials of Organizational Behaviour (New Jersey: Prentice Hall, 1988), p. 224.

¹⁶Peter M. Senge and others, The Fifth Discipline Fieldbook. Strategies and Tools for Building a Learning Organization (New York: Doubleday, 1994), p.438.

increase costs and decrease effectiveness through lowered productivity, increased absenteeism and affect motivation to a debilitating level of strike action.¹⁷ Given these consequences, it seems to be of critical importance to avoid the resistance to change particularly while strategically planning the very raison d'etre of an organization.

Where Does Resistance to Change fit in the Strategic Planning Process?

At the onset of this paper, it will be important to recognize that the study of strategic planning does not entirely overlook resistance to change as a barrier to success. John M. Bryson, in his book Strategic Planning for Public and Nonprofit Organizations, does indicate that strategic planning is faced with human problems. He characterises individuals as having limited ability to handle complexities and recognizing gradual change.¹⁸ Once managers understand these characteristics, he suggests, there are techniques to enable the strategic planning process in recognition of these human tendencies. He likens individuals to frogs to suggest that people will adapt to change as long as the change is gradual; much like a frog that will remain in a pot of water and slowly die if one raises the heat only gradually.

¹⁷Judith R. Gordon, A Diagnostic Approach to Organizational Behaviour, 2nd ed. (Massachusetts: Allyn and Bacon, Inc., 1987), p. 693.

¹⁸John M. Bryson, Strategic Planning for Public and Nonprofit Organizations. A Guide to Strengthening and Sustaining Organizational Achievement (San Francisco: Jossey-Bass Inc., 1988), p. 200.

Bryson suggests, frogs and people will both resist the threat (boiling water/change) if it is presented quickly.

Similarly, Coopers and Lybrand Consulting Group, in their book Strategic Management, An Introduction for Municipal Managers and Councils, have included a sparse three paragraphs to discuss issues relating to resistance. Coopers and Lybrand state there should be recognition that there will be a resistance to change during the strategic management process. Managers are encouraged to break down that resistance by introducing change "enthusiastically...as a positive, necessary and natural force . . . (understanding) phased transition may (also) help reduce resistance and build recognition of the need for, and potential advantages of change."¹⁹

A further illustration is cited from an article in Canadian Business Review. The author argues there is a necessity for more strategic management and less traditional planning because of the rapidly changing political and socio-economic conditions. The article indicates that "unfortunately, most people find change difficult to accept . . . we will have to learn the best ways to inspire employees to

¹⁹The Coopers and Lybrand Group, Strategic Management. An Introduction for Municipal Managers and Councils (Toronto: Queen's Printer for Ontario, 1989), p. 52.

initiate and accept change and, consequently to become agents of change."²⁰ The article, however, fails to elaborate on this issue and goes on to discuss the point that fortunately there are always some individuals who seek out change. Williams suggests that it is the responsibility of management to seek out these people and use them in the strategic management processes. There are several enlightening methods indicated which are focused on those who have a tendency to accept change. No further information is provided on the how to counteract the effects of the vast majority who are naturally in resistance.

While it is evident that there has been some discussion of resistance to change within the study of strategic planning, it is an area which has not been emphasized. Certainly, collective resistance to change has not been recognized as a serious concern that has the potential to undermine the entire process.

In summary, it would seem the best solutions offered to counteract resistance to change tendencies within the study of strategic planning include ignoring it or providing a slow transition with the implication that managers may be able to "trick" organizational members into acceptance. While these tactics may be effective, it will be interesting to explore alternatives with a more focused attention to the factor of resistance to change.

²⁰Marshall M. Williams, "A Strategic Approach to Managing Change." Canadian Business Review, XVIII (Summer 1991), p. 19.

Public Agency Strategic Planning Review

It is interesting to note the findings of a 1992 strategic planning study conducted through the Florida State University which included a national survey in the United States. There were 987 surveys sent out to state program and regulatory agencies, with a return rate of 56% (548). The survey assessed agency experience with strategic planning through a series of questions and comments.

Sixty percent of the respondents reported some type of strategic planning in use within their organization and an additional 9 percent planned to do so in the future. The initiation of strategic planning was predominately reported as a decision of individual agency leaders. These leaders reported they had hoped to set program and policy direction, to emulate an exemplary practice drawn from the private sector and/or to respond to budgetary pressures. The report concluded that there is a largely positive perception of strategic planning's impact on a variety of important internal and external outcomes and that overall, strategic planning can be described as a successful public sector management innovation.²¹

²¹Frances Stokes Berry, "State Agencies' Experience with Strategic Planning: Findings from a National Survey" in Public Administration Review (March/April 1995, Vol. 55, No. 2) p. 159.

What is of particular interest to this paper, however, is the responses reported from the questions relating to challenges within the process. Of the sixty percent of agencies with strategic planning in use, one third advised there had been changes made to the process (while in progress) in reaction to problems of facilitation. One of the most common reasons cited for changes was as a reaction to initial staff resistance.²²

Why is this discussion important for Ontario Municipal Governments?

Literature pertaining to strategic planning programs for public/municipal organizations advocate a specific and pressing need for strategic planning due to the unique and difficult challenges in the public realm; particularly in the 1990s. It is argued that strategic planning requires strategic thinking and strategic thinking is required to be effective in time of fiscal restraint. Secondly, the strategic planning process emphasizes an assessment of the external environment and the desires of the organization's stakeholders. A public organization exists not to perpetuate itself or to maximize profit, but rather, to provide goods and services for members of the public.

²²ibid., p. 163.

It would seem the strategic planning process can be particularly useful in justifying and validating services to the public. The strategic planning process will assist members to answer the question "are we doing the right things?" and thereby become more accountable to the stakeholders.

Political climates change, the players change and focus is changed over time. It can be argued, if properly implemented, strategic plans can continuously provide for necessary readjustments and re-evaluations to account for these changing factors.

Further, it is becoming increasingly clear that there are inadequacies in the current local governmental systems in Ontario. Particularly, as Tindal and Tindal point out in Local Government in Canada, there are inappropriate municipal boundaries and fragmented municipal structures, an erosion of powers with the proliferation of special purpose bodies, commissions and senior levels of government, insufficient resources, increase in controversial issues and value judgements facing municipal governments and increase focus of ineffective leadership, coordination and accountability.²³ These perceived inefficiencies and inadequacies may lead to increasing challenges from the public and higher levels of government to reassess structure, systems, efficiencies and operational procedures.

²³C. R. Tindal and S. Nobes Tindal, Local Government in Canada 3rd ed. (Toronto: McGraw-Hill Ryerson Ltd., 1990), p. 74-75.

One clear example is the Greater Toronto Area study, commonly referred to as "The Golden Report" as tabled in January 1996 by the Task Force of the Future of the Greater Toronto Area. The task force was formed as a provincial initiative to respond to growing concerns about the health and workability of the city-region inclusive of 5 municipalities in the Toronto area.

Certainly it cannot be stated that effective strategic planning will resolve all the problems of local governments. However, there is a case to be made for strategic planning assisting in the self-diagnosis of problems and solutions. Moreover, minimizing the resistance to change efforts by municipal employees within an effective strategic planning environment would help in the formulation and augmentation of effective government.

Halton Regional Police Service

Halton Regional Police Service was established through the Regional amalgamation of the Towns of Oakville, Milton, Georgetown, Acton and the City of Burlington in 1974. It is a police organization of approximately 530 personnel and polices a population of 375,000.

In 1991 and again in 1995, the Halton Regional Police Service completed processes which can be defined as strategic planning. While it is interesting to compare the efforts in each regard, we will focus on one particular feature. In the first instance, no effort was made to counteract employee resistance to change. However, in the second undertaking, resistance to change was identified early in the process as a threat. Dealing with employee acceptance was considered a key element to ensure progress, co-operation and "buy-in" from members of the organization.

The two processes can also be compared in terms of fundamental differences in the methods used within the framework of the Harvard Policy Model of strategic planning. Three specific differences will be discussed;

1. Process - Top-down style verses participatory;
2. Implementation focus verses no implementation focus (budget integration as an effective tool); and
3. Internal versus consultant leadership.

Halton Regional Police Service - Strategic Planning Process - 1991

In January 1991, the Halton Regional Police Services Board and the Halton Regional Police Service embarked upon a process they characterized as "strategic planning." The police service had defined a strategic plan as "the process by which the guiding members of the organization envision its future and develop the necessary procedures and operations to achieve that future."²⁴

Strategic management was defined as the ongoing evaluation and updating process undertaken once the plan had been developed²⁵. Clearly, this particular strategic planning approach was seen as a "top-down" process involving only selected individuals. It will be the contention of this paper that this process can be considered a resounding failure.

In early 1991, the Halton Regional Police Service Board hired a consultant from the Institute of Environmental Research to act as the facilitator through a strategic planning process. During March 1991, a two day workshop was attended by selected senior management and the Police Service Board members. No contact was made between the facilitator and any members of the Service until the first day of the workshop. The purpose of the workshop, according to the written information

²⁴Halton Regional Police Service, Strategic Plan (unpublished: 1991), p. 1.

²⁵ibid., p. 1.

provided by the facilitator, was to review environmental information including Regional, Police Service, economic, political, social, demographic and ethnic profiles, crime trends, employment equity and other legislation that would have impact on the Service. As part of this review the participants identified their clients, their needs, expectations, and values.

During the workshop, five key issues were identified which formed the basis of the first strategic plan. The Halton Regional Police Service philosophy was also adopted by all workshop participants - as a mission statement. The mission statement had been originally developed in 1982 as a visionary philosophy. The mission statement is as follows:

The Halton Regional Police Service will respond to community needs through a combined strategy of preventive, proactive and reactive policing programs, using the concept of the constable centre generalist, the whole of which will be supported by a participatory management environment.²⁶

It is also important to note that this mission statement/philosophy was based on the adoption of six key value statements, which all issues had to support. These values are stated as belief statements - The Halton Regional Police Service believes -

- in upholding all Canadian legislation and preserving the fundamental principles set forth in the Canadian Charter of Rights and Freedoms

²⁶ibid., p. 4.

- in delivering an adaptive and dynamic service that understands and fulfils the policing needs of the Halton community
- that the true test of police efficiency is "the absence of crime and disorder and not the visible evidence of police activity" (Sir Robert Peels 9th Principle)
- in nurturing a relationship with the public that ensures that "the Police are the Public and Public are the Police" (Sir Robert Peel's 7th Principle)
- that the Service must be accountable and accessible to a well-informed public; and
- that management through participation can only be achieved through attentive listening, effective communication and daily personal contact. ²⁷

In May 1991, an in-house Strategic Plan Coordinator and five Planning Committees were selected by the Chair of the Police Service Board and the Chief of Police. The Planning Committees, under the direction of the Coordinator, were mandated to address each of the five key issues. The Coordinator was seconded from her regular Uniform Patrol functions for an unspecified time period. Committee members consisted of senior ranks and civilian management, members of the Police Association, the appointed Coordinator for the Plan and members of the Halton Regional Police Services Board. The Institute of Environmental Research Inc. was further contracted to facilitate the committee meetings. Meetings were held throughout of the month during which goals, objectives and action steps were developed with a purpose to provide clear direction in achieving the objectives.

²⁷ Ibid., p.3.

Each action step included a completion date and the person, committee or department assigned with the tasks.

It was clearly suggested in the strategic plan document that the process would be evolutionary in nature and would require daily application and continuous evaluation. The Service identified the ongoing evaluation and updating process as "Strategic Management."

By September of 1991 each of the five committees had developed their issues into one or more goals. Each goal was also expanded to include corresponding objectives and action steps - identifying the responsibility and completion dates.

The Coordinator was responsible for consolidating all the information received from committees into a comprehensive and clear format suitable for distribution to all members of the Service. Secondly, a condensed version was made available to the public. The formal report provided to all employees can be described as a large, glossy 100 page binder inclusive of numerous promotional photographs. The public sector version was condensed; containing less background information and less "process" description.

Once approved formally by the Police Service Board, all 530 members of the Service were issued the plan in the form of a binder. Supervisors were responsible for ensuring that employees were aware of the plan and familiar with the contents.

Each person identified as a "responsible party" to an action step was contacted by memorandum through the Chief of Police. They were instructed to complete the action steps as indicated and report progress to the Coordinator on a quarterly basis. In addition, quarterly meetings were scheduled, including all Directors/Unit Commanders, Deputy Chiefs, Chief of Police and the Strategic Plan Coordinator. The purpose of the meetings was to monitor and report on the status of goals, objectives and action steps. The binder included a page describing the intended implementation and evaluation plan. It also indicated, at the end of each calendar year, the Coordinator would prepare a detailed report on the progress of the Plan. It was anticipated that any "missed" steps or additional steps would be identified by the Coordinator along the way.

By the end of 1991, each District office received a large "bristol board" presentation chart entitled "Halton Regional Police Service - Strategic Plan". The board was mounted in each police station and charted the 20 identified objectives developed through the five goal statements. Each objective was identified as a number (one through 20) along the left side of the board and a grid chart was formed which used months of the year along the width of the board. A red line was positioned

horizontally at each number; ending with a black dot at the corresponding month the objective would be achieved.

During the first and second quarter of 1992, some objectives had been achieved, particularly if the objective related to a legislatively mandated requirements, such as Employment Equity. By mid-1992 the Sergeant appointed as Coordinator had returned to her regular duties and the Planner became the official strategic planning Coordinator. However, no progress reports were being received and the Committees no longer met on a quarterly basis. No further action steps were reported as being completed or achieved and the entire process was abandoned.

In a symbolic gesture of disbandment, all the large bristol boards were removed from their district locations by the end of 1992. As a footnote as well, recently two large boxes of binders were found in an obscure storage area within one of the police buildings. Enquiries revealed the contents to be strategic planning binders left over from 1992. The boxes were discarded in the garbage.

Process

Coopers and Lybrand, in Strategic Management, An Introduction for Municipal Managers and Councils, recommend the first phase of the Strategic Management process:

begins with the design of the strategic management process itself... including environmental scanning, internal review and stakeholder consultations to provide vital information concerning the municipality's current position and its strength, weaknesses opportunities and threats (SWOT).²⁸

This strategic planning document included as the first "chapter" - 39 pages entitled "Environmental Scan - 1991". In July 1991, (well after the workshop) this information was developed and incorporated into the plan, by the Planner of the Service (a member of the Service who had not participated in the May workshop).²⁹ The Environmental Scan included information relating to population growth, age distribution, ethnic origins, crime trends (property and violent crimes) , traffic statistics and police service requirements in terms of trends in increases of calls for service, human resources and costs in terms of expenditures per capita and household income (in comparison to other Ontario policing agencies of comparable size). The chapter concludes that "the purpose of this environmental scan was to provide information from which to identify justifiable issues for the comments and views from internal and external stakeholders, often by way of surveys. Time constraints negated this option. "³⁰

²⁸Coopers and Lybrand Consulting Group, Strategic Management. An Introduction for Managers and Councils. (Toronto: Queens Printer for Ontario, 1989),p.27.

²⁹Information obtained through interview with Mr. Keith Moore, Halton Regional Police Service Planner.

³⁰Halton Regional Police Service. Strategic Plan. 1991, p. 39.

The credibility and value of the environmental scan were obviously reduced because it did not contain internal or external stakeholder information or options. In addition, it was not developed until after the workshop and was not used at all to develop the key issues. The conclusions developed were extremely shallow and included statements as follows:

Halton police expenditures per capita compares favourably with other local and similar sized regional services;

Halton will face increasing budgetary pressure and financial accountability in the coming years to maintain this position; and

There is a very wide range of factors that impact upon the current operations and future development.³¹

The strategic planning process could have been improved by incorporating the results of a well-defined environment scan into the workshop phase with worthwhile and meaningful conclusions.

It is also interesting to note that the Planning Bureau of the Service had developed a strategic planning process report and presented it to the Chief of Police in 1990 (prior to this exercise). The Planning Bureau report suggested the importance of an environmental scan, identification of strengths, weaknesses, opportunities and

³¹ibid., p. 39.

threats and had identified stakeholders for the Service.³² However, the Planning Bureau report was not used in the development of the strategic planning process, nor was the Planner include in the process. Once the Police Services Board started to champion the process, there was no further involvement of Planning personnel.

Strategic Issues

John M. Bryson, in his book, Strategic Planning for Public and Nonprofit Organizations describes a statement of a strategic issue as follows:

First, the issue should be described succinctly...(it) should be framed as a question that the organization can do something about; ...second, the factors that make the issue a fundamental policy question should be listed... finally, the planning team should define the consequences of failure to address the issue.³³

Issues developed within the Strategic Plan by the Halton Regional Police Service in 1991 were "fuzzy" conceptual topics such as "service excellence" and "personnel development." The issues lacked concrete terms or subject matter that could be understood in terms of a policy question. For example, the second issue outlined in the Plan leads to a goal of increasing the public's understanding of policing. To

³²Information provided through interview with Mr. Keith Moore, Halton Regional Police Service Planner.

³³John M. Bryson, Strategic Planning for Public and Nonprofit Organizations. A Guide to Strengthening and Sustaining Organizational Achievement (San Francisco: Jossey-Bass Publishers, 1988), p. 57.

achieve this goal, one would have to know what the level of understanding is at this point in time and measure it after some action has been taken to improve it.

It would seem the plan would have been better served to have developed more well-defined issues and goals that could be measurable and relevant to the mission of the service. There was no measuring stick from which to determine if the goals outlined were the "right" goals - given the poor environmental scan, no stakeholder opinion and minimal "S.W.O.T." analysis.

Buy-In - Internal Acceptance

While it may be normal operating practice for members of the private corporate world to conduct meetings at extravagant conference centres, it is unusual, at best, in the policing world. The choice of location for the workshop was highly criticized by the employees of the Service and the Police Association. Conference facilities are available at the Ontario Provincial Police Academy in Brampton, Ontario, C.O. Bick Police College in Scarborough and in Aylmer at the Ontario Police College - at considerable less cost than the Kempbenfelt Conference Centre in Barrie. The choice of locations was largely influence by the consultant and the affiliated Board member who were more familiar with dealing with corporate businesses rather than police agencies.

The workshop was also a source of alienation for members in the fact that only selected personnel were invited to attend. Minimal information was provided to the members of the Service to educate them about the process and plan. The process would have benefited from better communication between the participants of the workshop and the "rank and file" of the organization. Indeed, a question and answer period immediately prior to the workshop and immediately following the workshop would have helped to reduce rumours and resentments becoming rampant.

Implementation

Dominant personalities prevailed in the development of the value statements. However, what is more interesting is the LACK of participation by some key individuals within the Service. For example, (as indicated previously) the Planner was not included in the workshop, nor was the Manager of Computer Services or the Manager of Finance. In addition, the committees formulated after the workshop did not consult or communicate with the individuals they suggested were responsible parties for each action step. It would seem there was no consideration for ability, resources, other priorities and time restraints in the assignment of action steps and their respective due dates.

The coordination role was a key element to facilitate the implementation. However, the person appointed had no experience or formal training in strategic planning before entering into the position. Nor had she attended the 2 day workshop to have been privileged to the discussions. In fact, the strategic planning course offered at the Ontario Police College had been attended by two other members of the Service and these two members did not participate in the process.³⁴ Obviously the implementation stage would have been improved with the participation of members who had been trained in the concepts of strategic planning and could instill credibility to the exercise.

In addition, the action steps that had been developed through the committee were so loose and poorly defined that the Steering Committee could not determine if they had been accomplished or not. One must be able to determine if something has been achieved or not to determine if success is achieved.

It would seem the plan defines the "implementation and monitoring" phase as simply the process by which progress reports were submitted. In many cases, however, managers had indicated that the reports were of poor quality and no feedback was received, once submitted.³⁵

³⁴Information obtained through interview with Mr. Keith Moore, Halton Regional Police Service Planner.

³⁵Information obtained through interview with Mr. Keith Moore, Halton Regional Police Service Planner.

Budget Integration

One criticism of past long-range planning processes in government is that they too often are not integrated into the regular budgeting cycle and thus do not fundamentally reallocate the organizations priorities toward achieving its future goals.³⁶ It was clear from the Florida study that state agencies had begun making a linkage of budget processes and the strategic planning process; and found this to be particularly helpful in the implementation and success of the process.³⁷

In this particular case, the consultant fees and cost of binders for the plan had no "planned" budget but were charged to the Police Services Board Trust Fund. Moreover, the implications or results of the plan were not integrated into the budgeting process. The Halton Regional Police Service develops their annual operating budget through individual program accounts presented initially as Status Reports. These Status Reports identify the recommended goals of the program and the previous year's successes in terms of these goals. The Status Reports will further identify the future goals of the program and what monetary and human resources support is required to achieve the future goals.

³⁶Jack Rabin, Gerald Miller and W. Bartley Hildreth, Handbook of Strategic Management. (New York: Marcel Dekker, 1989)

³⁷Frances Stokes Berry and Barton Wechsler " State Agencies' Experience with Strategic Planning: Findings from a National Survey" in Public Administration Review (March/April 1995, Vol. 55, No. 2), p. 163.

No integration of strategic planning goal recommendations were developed through the 1991 or 1992 Status Reports. "The budget process should be adapted to reflect and reinforce strategic planning; strategic planning should not be an outgrowth of the budget process."³⁸

Leadership

Implementation was hampered in that the Steering Committee had no direction, no education or training, accountability and lacked leadership.

It could also be argued that the implementation was far from successful due to the lack of commitment by the personnel involved. The leadership roles for the Halton Regional Police Service in 1991 and 1992 were such that the Board membership was being changed due to the expiry of several politically appointed seats and the Chief himself was opting to retire. Chief Harding did in fact retire in 1993 without any closure being made to this process.

³⁸The Coopers and Lybrand Consulting Group, Strategic Planning. An Introduction for Municipal Managers and Councils. (Toronto: Queen's Printer for Ontario, 1989), p. 47.

Summary of Strategic Planning Process - 1991 Case Study

The experience of Halton Regional Police in a strategic planning process during 1991-1992 was particularly poor in comparison to the overall theoretical framework as provided by leading theorists indicated in this report (Bryson, Nutt, Kanter, Coopers and Lybrand) and in comparison to successful cases as reported in the Florida study (Frances Stokes Berry, Florida State University). While there was a focus on mission, direction and vision, there was no clear steps acted upon to build on present capacities and strengths. As Rosabeth Moss Kanter has indicated - the change "drift" which should be avoided through strategic planning - did in fact occur. Further, a lack of budget integration contributed to a poor implementation process and ultimate disbandment.

The top-down exercise would seem to have alienated many of the middle-level managers and employees. Implementation was hampered through this alienation when assigned personnel were unable to meet targeted goals and relevant factors such as realistic time frames, buy-in and follow-up processes were not included in the strategy.

As indicated by Frances Stokes Berry in her survey of 987 state agencies, leadership is also a very important factor in strategic planning success. "We expected that agency executives would adopt strategic planning as a symbol of

their personal leadership... results from the survey generally confirmed this hypotheses."³⁹ However, it is clear that the consultant used in this process did not know how to work with the organization and the Chief of Police and members of the Police Services Board did not hold the process as a "symbol" of their personal leadership.

Halton Regional Police Service - Strategic Planning Process - 1995

By 1993, Halton Regional Police Service was anticipating significant cuts to approved budget levels through provincial reductions of transfer payments and social contract legislation. Since 84 per cent of the police budget is personnel costs, permanent savings in salaries can only be generated by reducing positions. In 1994 and 1995 some organizational changes were initiated. However, given it was unlikely the provincial reduction would be returned to budget, the Police Service Board directed that a comprehensive review of the organization be undertaken. The project objectives were three fold:

³⁹Frances Stokes Berry and Barton Wechsler. "State Agencies' Experience with Strategic Planning: Findings from a National Survey" in Public Administration Review (March/April 1995, Vol. 55, No. 2), p. 161.

1. Review and streamline various processes for maximum effective use of resources;
2. Create an Organizational Design that will meet the challenges of expected future growth; and
3. Target permanent cost savings of \$1,500,000.

The main theme of the Organizational Review Project was to "eliminate, combine or automate" those activities which would take away from the Services' ability to effectively deliver services or which mean more paperwork and bureaucracy.⁴⁰

The initial phases of the process included the request for volunteers from all ranks, levels and departments of the Service to participate in task forces which would serve to review every program, bureau and job task in the organization. Out of an organization of 530 individuals, over 100 people agreed to joint a team. Each individual in the organization was advised of the project through inter-office memorandums, electronic mail and supervisory advisement. The new Chief of Police, Peter J. Campbell, indicated it was his intention to encourage all members of the Service to become more participative in designing changes to the way we do

⁴⁰Halton Regional Police Service. Organizational Review Project. The Challenge of Change. (unpublished) 1995, p. 4.

business... our successes and real solutions to everyday problems will only come from staff involvement.⁴¹

Documentation was received from other Police Services in Canada to review reporting relationships, productivity and staffing issues. In addition, an extensive public survey was completed to determine stakeholder priorities.

One key element of the process was Communications. One of the 7 task groups formed was solely mandated with maximizing communications throughout the organization about the project and its progress. A special telephone hotline was set-up, on-line electronic mail line was implemented, regular electronic bulletins on status of the project were completed, a video was produced, newsletter "Directions" was published and distributed monthly, suggestion form was distributed to all staff and all task leaders and the Chief were available at special informal meetings and District patrol parades to answer questions.

It is interesting to note this project had defined "stakeholders" as taxpayers, all levels of governments, all residents, business and industries, other community agencies and social services.

⁴¹ibid., Introduction by Peter J. Campbell, Chief of Police

The results of the project can be summarized as a total of 170 recommendations for change including a reduction in annual budgetary costs of \$1,213,000, a reduction of 14 positions and an overall reorganization of the entire organizational structure.

The actual implementation of the 170 recommendations has not been achieved to date and the measurement of success is not particularly clear since most of the recommendations were not framed in a "SMART" goal format. Timeframes and specific action plans were not developed by which success could be measured. Changes resulting in monetary/budgetary savings were however tangible and measurable.

Process

In January 1994, 2000 randomly selected residents of Halton were sent a survey asking questions relating to their experiences, priorities and expectations of police in their community. Of the 2000 surveys sent out, 725 were received by the cut off date and used for the report and analysis. The return rate of 36 per cent is high by survey standards, particularly for a mail survey. The statistical reliability for the survey is 95 per cent plus or minus 4 per cent. From the information gleaned from the survey results, project task leaders were able to develop very significant goal orientations for the Service. For example, Halton residents perceive residential

break and enters, auto theft, vandalism, theft from autos and youth loitering as the top five "major" problems in their communities.

In addition, the largest majority of respondents believe the police should spend more time attending schools, controlling illegal drugs and criminal enforcement activities and that an overwhelming majority of respondents believe that the public and police have a shared responsibility in providing a safe community.

Leaders within the project were able to mould the "change" process with justifiable and concrete concerns from the community. It was clear to the entire Service that the future for Halton Police included community based policing and that future priorities would be developed through the wants and desires of the organization. The information from the survey was made very available to the members of the Service and through the public in full page advertisements within the local papers. Change became the requirement based on factually based information.

Implementation

For more effective change efforts, it usually makes sense to include recipients among the implementors and strategists. Much resistance to change occurs because recipients bring the own interests, goals, and group memberships to the change table. In some cases, often as a result of their

perceived powerlessness, recipients form their own formal associations to attempt unilaterally to increase their own power in the responding role.⁴²

Considerable attention is focused in "OD" on team building as it is recognized that organizations are made up of people working together to achieve common goals. Kanter, in the above quote also cautions that unless carefully conceived, even the change programs aimed specifically at empowerment and employee participation can backfire. In this particular project, team-building was of significant importance and was carefully developed through the efforts of 7 teams.

It was further recommended that the entire policing process would be changed into a "team approach" for the purposes of facilitating community based policing. The Community Based Policing Task Force concluded that the development of a system that most appropriate supports the adopted Service Delivery Philosophy, is a "TEAM" approach.

There were many benefits to the Team-approach that were identified in various work environments, with the following being specific to policing in Halton:

policing ownership, using natural and real geographic barriers, ensure or is conducive to consistency, increase resources for a problem solving environment, more flexibility, empowerment, increases staff development,

⁴²Rosabeth Moss Kanter and others. The Challenge of Organizational Change. (New York: The Free Press, 1992), p. 17.

removes isolation, enhances consultation, reduces need for specialization and integrates response.⁴³

It was also important for TEAM-trainers themselves to be trained. There was considerable expense paid for members of the organizing group to be provided with team building training modules before the training process was initiated.

The Community Based Policing Task Force also identified the need to address appropriate support for effective communication, monitoring and guidance, leadership activities and training in order to successfully develop the transition (i.e. the change). There was an identified requirement for external training consultant, personnel to develop, facilitate and plan the training process, personnel to carry out the training process and support positions for the approach. Inherent in this planning process, the group also identified the obstacles to the implementation; including resistance to change itself and the requirement to team-build.

Budget Integration

The recommendations derived from the process were integrated into the budget process to the extent that the entire budgetary system was revamped. Of particular importance was to put the budgeting and implementation processes within the same

⁴³Ibid., p. 8.

cycles and provide realistic time frames for both. Budget reductions was in fact a main objective within the process and became a key factor in determining success. Budget requests had to be tied directly back to the recommendations provided through the plan and be based on the plan's identified strategic issues, goals and objectives. Further, it was important to establish benchmarks to establishing outcome performance measures so that an evaluative component could be completed.

Leadership

Chief Peter J. Campbell joined the Halton Regional Police Service in January of 1995; roughly at the same time as the project was initiated. Clearly this process became linked to his leadership from the beginning. He provided a focal point for the process and established this process as being the benchmark for leading the Service into the future. Chief Campbell was very vocal in his support of the project but was careful to ensure that members of the Service felt a sense of "ownership" for it. He did not want employees to feel that the process was dictated by him and illustrated this by ensuring others led discussions and meetings. "Brain-storming" meetings were conducted with large groups of people being randomly re-grouped into smaller groups for discussions on pre-assigned topics. The Chief would be assigned to a smaller group, just like any other member. He indicated his opinion

was only as important as anyone else. Often consensus was reached regardless of the Chief's opinion being known.

Leadership in terms of communicating goals and mandate was very focused and clear. Chief Campbell wanted members of the Service to know what he expected, but wanted the members themselves to get there.

Summary of Strategic Planning Process -1995 Case Study

The 1995 process can be assessed as an example of strategic planning as it contained all the measurable components typically associated with the Harvard Policy model of strategic planning. The success of the process can also be measured through the achievement of identified goals. Budget integration, clear leadership direction and participatory emphasis can all be seen to have contributed to this success. However, what is of particular interest is the factors that can be identified as contributing to counteracting resistance to change. Clearly, employees had much to "lose" in terms of possible job insecurity, shrinking program budgets and possibly being forced to "do more with less."

Earlier in this paper, we identified specific tactics which can be used to minimize resistance to change. Examples included the following;

1. Encourage participation of those affected by the change during planning;
2. Let the clients experience the need for change;
3. Maintain open and frequent communications;
4. Avoid a we-they mentality;
5. Consider needs of individual employees; and
6. encourage voluntary change.⁴⁴

In reviewing the 1995 case study we can conclude that most of these elements were present during the process. For example, the process was clearly based on participation and employee involvement, maintained open and frequent communications through a variety of communications mediums, avoided a we-they mentality by involving all levels of the organization and considered the needs of individuals employees by providing the opportunity for the employees themselves to develop recommended changes.

To further support these findings, we reference studies that have indicated there are several commonalities among successful processes of change;

- Change had top management support;
- Change is built on the unique strengths and values of the corporation;

⁴⁴ Judith R. Gordon, A Diagnostic Approach to Organizational Behaviour, 2nd ed. (Boston: Allyn and Bacon Inc., 1987), p. 694.

- The specifics of the change were not imposed from the top (instead all levels of the corporation participated broadly and openly in all stages of the process;
- Change was holistic;
- Change was planned;
- Changes were made in the guts of the organization;
- Change was approached from a stakeholder viewpoint ;and
- Change became ongoing. ⁴⁵

Again, we are able to compare this list of characteristics with the 1995 case presented herein.

Conclusion

Strategic planning calls for an entrepreneurial mind set and constantly challenging assumptions. Strategic planning also means frequently working through many variables and scenarios and coming up with short term responses. In fact, organizational success may indeed rest with the ability to manage the process of change.

⁴⁵James O'Toole, Leading Change. Overcoming the Ideology of Comfort and the Tyranny of Custom (San Francisco: Jossey-Bass Inc., 1995), p. 74-75.

At the onset, the purpose of this paper was stated to include a discussion of resistance to change within the strategic planning process and from the vantage of two particular case studies. We have been able to determine that in the first case presented from Halton Regional Police Service, there was little, if any, effort to take into consideration employee resistance to change. We can also conclude that the process in fact was not effective in achieving its goals. The second case, however, does illustrate factors that OD studies report as being effective countenances to resistance to change.

The cause/effect relationship of the uses of these techniques and the subsequent success or failure of these projects has not been adequately proven. However, it is clear a participative process, implementation focus and budget integration as well as effective internal leadership may have contributed to the effectiveness of the exercise. Recommended components to counteract resistance to change as provided from OD theorists certainly was evident within the cases provided herein.

The University of Florida study cited in this paper predicts that strategic planning is poised to have even bigger and more important impacts in the future.⁴⁶ They conclude that the growth and diffusion of strategic planning might take several forms. One avenue suggested involved the diffusion of strategic planning efforts

⁴⁶Frances Stokes Berry, "State Agencies' Experience with Strategic Planning: Findings from a National Survey" in Public Administration Review (March/April 1995, Vol.55, No. 2) p. 165.

downward in the organization. Perhaps it can be further speculated that in fact downward movement will be the only way strategic planning will be effective in the future since it also will contribute to counteracting employee resistance to change.

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